

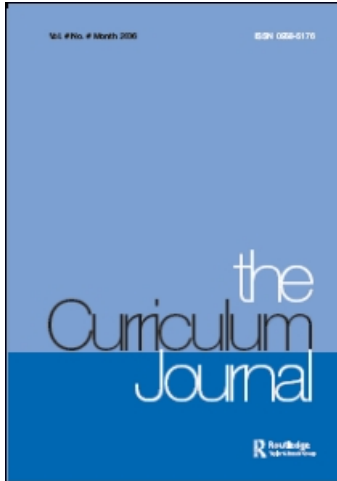
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David Pedder^a; V. Darleen Opfer^a; Robert McCormick^b; Anne Storey^b

^a Faculty of Education, University of Cambridge, Cambridge, UK ^b The Open University, Milton Keynes, UK

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‘Schools and Continuing Professional Development in England – State of the Nation’ research study: policy context, aims and design

David Pedder^{a*}, V. Darleen Opfer^a, Robert McCormick^b and Anne Storey^b

^a*Faculty of Education, University of Cambridge, Cambridge, UK;* ^b*The Open University, Milton Keynes, UK*

This article introduces the *Schools and Continuing Professional Development State of the Nation* study (SoNS). Discussion of English policy together with an account of the study’s aims and research design provide a context for the other articles included in this special issue. A key assumption behind the research, and the prevailing CPD policy context in England, is that organisational conditions in schools are highly influential in the development of sustained and effective classroom-based, collaborative, inquiry-oriented CPD. Therefore, the aims of the study investigated the range and kinds of support that schools in England provide as well as the range and kinds of CPD activities in which teachers were able to participate. Teachers’ professional learning practices and perspectives were researched in relation to three main themes: (a) the benefits, status and effectiveness of CPD; (b) the planning and organisation of CPD; and (c) access to CPD. These questions were explored through a mixed methods design consisting of three strands: (a) literature review; (b) qualitative research (school snapshots); and (c) a national survey of primary and secondary teachers in England. Discussion of processes and procedures of data analysis is followed by a summary of our conceptual model of schools and teachers’ CPD.

Keywords: CPD policy; effective CPD; teachers’ professional learning; research design; sampling; data collection and analysis

Introduction

The purpose of this article is to provide an introduction to the ‘Schools and Continuing Professional Development in England – State of the Nation’ (SoN) study¹ and a context for the other articles included in this special issue. In this article we provide an account of the English policy context of teachers’ continuing professional development together with the aims and research design of the SoN study, which forms the background for all the other articles in this special issue.

*Corresponding author. Email: dgp23@cam.ac.uk

Background to the ‘State of the Nation’ (SoN) study

The Training and Development Agency for Schools (TDA), who commissioned this research, has played a key role, as an agency of government, in supporting standards-based reform in England. As part of the five-year strategy of the Department for Children, Schools and Families (DCSF; formerly called the Department for Education and Skills) in 2004, the remit of the TDA was extended beyond quality assurance of initial teacher education to include development of the school workforce through the creation and promotion of professional and occupational standards, support of performance management arrangements and stimulation of a sufficient supply of high quality CPD (Continuing Professional Development) (DFES 2004). More specifically, the TDA was asked by the DCSF to: (a) bring coherence to the occupational and professional standards used throughout the school workforce; (b) provide clear, high quality guidance on CPD and human resources and give leadership to local authorities in this area; (c) monitor the quality and coverage of CPD in regions and subjects; and (d) coordinate specific CPD programmes where appropriate. In January 2005 the TDA (formerly the Teacher Training Agency) published its advice to the Secretary of State at the DCSF on the extension of its remit to include CPD.

The TDA then wanted to build on the evidence base used in their advice in 2005 to establish if there had been any changes to the practices and perceptions of teachers’ CPD since 2005 and to inform future direction. A main purpose of the SoN study was therefore to extend this evidence base in order to gain a more comprehensive understanding of prevailing practices in teachers’ CPD overall and so to inform future development of the TDA’s CPD strategy.

CPD policy context in England

By 2008, when the ‘Schools and Continuing Professional Development in England – State of the Nation’ study started, the Training and Development Agency for Schools (TDA) had published a number of strategy documents through which it completed the revision of the professional standards for classroom teachers, established national priority areas for CPD supply, created guidance on effective CPD and impact evaluation, and had continued to coordinate the Postgraduate Professional Development (PPD) programmes for teachers. Through its strategies and its extended remit, the TDA has been instrumental in promoting CPD in England as a centrally devised and locally delivered mechanism for policy implementation (e.g. Day et al. 2007).

Centrally devised and locally delivered CPD: a mechanism for policy implementation

The first national strategy for teachers' CPD was launched in 2001 (DfEE 2001) and aimed to enhance capacity in schools for effective professional development, accompanied by central CPD funding direct to schools. CPD was to be shaped by schools' identification of teachers' development needs linked to performance management and school improvement priorities. Although funding was devolved and CPD was made a predominantly school-based activity, central direction was still highly influential. In the prevailing context of standards-based reform in England, the main purpose of CPD had changed from a focus on the personal professional development of individual teachers to a system to support schools in achieving their improvement priorities targeted at policy implementation and its effective management.

Under the New Labour government, CPD was a vital mechanism for implementing the National Strategies for Literacy, Numeracy and Key Stage 3. The Strategies extended government control over the content and processes of teaching and learning, based on selected evidence of 'what works' for teachers in all contexts, and were accompanied by a national programme of training, centrally devised and locally delivered. As Day et al. (2007) report, training was scripted and regionally disseminated to local authority consultants, who were centrally funded, who then provided training for teachers in schools, thus providing a 'cascade' model for teachers' training in schools.

Central guidance and direction of CPD, combined with local management, delivery and responsibility, are also seen in the development by the TDA in 2005 of the *Professional standards for teaching* framework (TDA 2007a), which set out a set of expectations, competences and standards that teachers in England are expected to meet at different stages throughout their career: qualified teacher status (QTS), main and upper pay scales, excellent teachers and advanced skills teachers (ASTs) (TDA 2006). Professional development needs of teachers were to be integrated with systems of performance management, professional standards and school self-review aimed at optimising student performance on national tests and school improvement, and this continues as a central focus of the latest national CPD strategy developed by the TDA (TDA 2009).

Establishing interplay between the national framework of *Professional standards for teaching*, performance management and CPD undergirded New Labour's construction of the so-called 'New Professionalism' for teachers. An important focus of the State of the Nation study was to investigate the extent to which alignment between these three aspects of

the 'New Professionalism' was in place and, importantly, whether and to what extent schools have developed strategic planning and evaluation systems and practices as a basis for establishing, and removing obstructions to the establishment of, coherent links between professional standards, performance management and CPD.

CPD, enforced compliance, and restricted notions of standards of achievement and professional knowledge

A key policy goal of successive governments has been to enforce the compliance of teachers to the national reform agenda. They have set about doing this by harnessing teachers' day-to-day practices, how they think about their work, what they know, and what they aspire to achieve through their work, to central prescriptions, targets and indicators related to raising standards. These prescriptions are embodied in the national strategies, high stakes tests of pupil attainment, league tables and procedures of external inspection (e.g. Whitty 2006; Day et al. 2007; Furlong 2008; Jones et al. 2008; Swann et al. 2010).

Parameters around what teachers do (and learn to do), and what they think and aspire to for themselves and for their schools were set very tight within this strict national policy framework of a highly regulated and controlled education system. This centralised approach raises questions about whether teachers are to be trusted to manage their own affairs and whether prescribing pedagogies and demanding compliance with official expectations is the best way to enhance the quality of pupils' learning, and the teaching and professional learning of teachers that support it.

Scope for teachers to develop effective CPD practices is considerably narrowed by such enforced compliance to successive governments' reform agendas since 1988. The TDA's definition of effective CPD refers to the importance of collaborative planning and teaching and cross-school networks (TDA 2007b). A great deal of research points to the effectiveness of CPD that is collaborative, classroom based, experimental and research-informed (e.g. Cordingley et al. 2005a, 2005b; Pedder et al. 2005; Bolam and Weindling 2006; CUREE 2008). Such CPD involves a great deal of devolution of policy initiative and pedagogic renewal and innovation to teachers in classrooms. However, enforcing compliance and tying teachers' learning so closely to a narrowly construed performance-oriented policy agenda undermines the professional independence and self-esteem that teachers need if they are to develop the risk-taking that is intrinsic to the experimental and collaborative professional learning practices and values that lie at the heart of effective CPD.

Further limitations on the development of effective CPD practices arise from the government's emphasis on networking and 'rolling out' selected evidence of 'what works' and what is 'excellent instruction'. This,

together with the marginalisation of higher education institutions (HEIs) in both initial teacher education (ITE) and CPD, has led to what Furlong (2008) refers to as the ‘hollowing out’ of teachers’ professional knowledge and a systematic reduction of opportunities for teachers to engage critically with research and evidence and to debate the nature or value of proposed forms of ‘excellent instruction’.

Indeed, space and support for teachers to reflect critically and examine larger questions about what is educationally appropriate for their pupils with respect to the content, context, processes and purposes of education, from the perspectives of their practical experience, value commitments and research have been eroded significantly as teachers are groomed in the role of ‘passive follower’ instead of ‘critical interpreter’ (Putnam and Borko 2000). Government policy seems to view CPD as a strategy for imposing its policy and accountability agenda by seeking, in Furlong’s words, ‘the endlessly re-trainable employee as policies change and develop over time – from literacy and numeracy, to Every Child Matters, to “personalisation”’ (Furlong 2008, 735).

Promising features of policy reform

While many commentators have argued that in the standards-based policy reform context that is currently established in England, being ‘professional’ has come to mean being ‘compliant’ with officially prescribed ‘professional standards’, and structures and procedures for their audit and measurement – part of a ‘managed’ form of professionalism – others have argued that certain aspects of policy reform outcomes, although unintentional, have been positive for teachers.

David Hargreaves, for example, in 1994, was arguing that at the school level there was a growing synthesis between a more sophisticated conception of teachers’ professional development and a strong commitment to institutional development. Hargreaves (1994) proposed that: (a) there is little significant school development without teacher development; and (b) there is little significant teacher development without school development. Both Hargreaves’s propositions are helpful in recognising the need for more integrated policies and practices for optimising both institutional and professional development. Running through his analysis is a model of collaborative professionalism and teamwork in contrast to more traditional models of professionalism that emphasise individualism and professional autonomy.

More recently, Geoff Whitty (2006, 2008) has argued that while contemporary policies have been problematic in many respects, they have contained some ‘progressive moments’ – or at least, he states, ‘created new openings for the development of more progressive practice’. He refers by example to recent interest in and emphasis on inter-professional

working and pupil voice. He argues that these practices may contribute to the development of new, more interactive forms of professionalism that transcend both 'traditional' occupational professionalism, based on the model of teacher autonomy and professional control derived from the established professions, and the current 'managerial' or 'managed' or 'organisational' professionalism implicit in recent reforms. Whitty considers 'collaborative' professionalism and 'democratic' professionalism as two provisional identities which, together with recent progressive moments of policy reform, carry some promise for teachers in developing effective CPD. Teachers are encouraged and supported in developing collaboration with parents, pupils and other professionals. This carries the potential for orienting teachers to an expanded horizon of repertoires, possibilities and interpretations of professional learning and practice constructed in increasingly interactive contexts at the intersection of different fields of activity.

Aims of the 'State of the Nation' study

Given the complexities of teaching and learning within a policy context of accountability and standards-based reform, and in a climate of expectations that young people are supported by their teachers in the development of lifelong learning, citizenship and independence, teachers' professional development needs to go beyond mere acquisition of knowledge and skills if they are genuinely to rethink and redefine their roles and relationships with their students and to reassess their expectations of what their students can achieve. As discussed in the section above, enforced compliance, prescription at the level of pedagogy, restricted notions of standards and professional knowledge, and increased surveillance of classroom teaching can limit opportunities for undertaking the kinds of CPD that support teachers to respond to the complexities and expectations placed on them by policymakers and researchers alike. However, developments in inter-professional working and pupil voice initiatives open on to new possibilities for collaboration and new partnerships in learning. A central aim of this study was to find out the range of characteristics of professional development activities in which teachers in England participate.

However, we did not limit ourselves to a focus on the characteristics of CPD undertaken by teachers in England. A key focus of government policy aimed to promote teachers' CPD as centrally directed but also as local activity based in schools. And so, from a government policy perspective, there was clear recognition of the importance of schools in supporting the implementation of CPD as a strategy for realising its policy priorities. There is plenty of research evidence demonstrating the importance of the organisational conditions in schools that support

sustained and effective classroom-based, collaborative, enquiry-oriented CPD (e.g. Imants 2002; Bolam et al. 2005; Pedder 2006; Pedder and MacBeath 2008; Vescio et al. 2008). In light of policy developments and research-based understandings we therefore aimed to investigate the range and kinds of support that schools in England provide for teachers' professional learning as well as the range and kinds of CPD activity which teachers are able to access and in which they were participating.

Specific aims of the 'State of the Nation' study

The specific aims of the SoN research were to examine prevailing teacher learning practices and perspectives in schools in England in 2008 in relation to three main themes:

- the benefits, status and effectiveness of CPD;
- the planning and organisation of CPD;
- access to CPD.

More detailed questions related to each of the three main themes were listed by the TDA in their tender specification.

Benefits, status and effectiveness of CPD

- (a) What do teachers and head teachers see as the benefits of CPD?
- (b) How important is CPD seen to be for the retention of teachers? What evidence is there of CPD improving the retention of teachers?
- (c) Are there different views of CPD's effectiveness among teachers and the senior management team in different types of school (e.g. pupil referral units (PRUs), special schools, primary/secondary, academies and specialist schools) or at different career stages (i.e. trainees, newly qualified teachers (NQTs), main-scale teachers, senior teachers (STs), advanced skills teachers (ASTs), excellent teachers, deputy head teachers and head teachers)?
- (d) Which CPD activities or resources do head teachers find effective and good quality?
- (e) How many of the characteristics of effective CPD identified by TDA are commonly present in CPD activity in schools?
- (f) How important is it to teachers that their CPD is accredited?
- (g) What kinds of CPD are seen to be value for money? How is value for money measured?
- (h) How is CPD seen to be having an impact in terms of raising standards and narrowing the achievement gap?

Planning and organisation of CPD

- (a) What is the role of local authorities in CPD?
- (b) Is there inter-professionalism in CPD planning in schools (e.g. to support the extended schools agenda)?
- (c) Is CPD in schools determined consistently by the priorities for school improvement (i.e. is CPD approached strategically, how are the needs of the individual balanced with the needs of the school in CPD planning, and how, and by whom, are the CPD activities agreed)?
- (d) How does CPD feature in performance management reviews?
- (e) Do plans for CPD link to career aspirations as well as immediate needs?
- (f) How are CPD choices influenced and informed by the professional standards?
- (g) What resources and sources of information do teachers use and how helpful do they find them?
- (h) What mechanisms are used to evaluate CPD activities?
 - (i) How, and why, are external experts used in CPD? What is seen to be the impact of this?
 - (j) How are ASTs and excellent teachers used in CPD in schools?
- (k) What are the roles of other players in schools' decisions about CPD (e.g. governors, higher education institutions [HEIs], subject associations)? Are these roles different in different contexts?

CPD access

- (a) What proportion of teachers engage in which types of CPD (e.g. take-up of external courses, proportion involved in mentoring and coaching as a part of their daily work, proportion engaging with national strategies resources, etc.)?
- (b) How accessible are different types of CPD activity?
- (c) What are the barriers to teachers taking part in CPD?
- (d) Are there differences between the needs and requirements of teachers in different types of school or at different career stages?
- (e) In what areas are there gaps between demand and supply?
- (f) How much time is spent on each form of CPD, during and outside working hours?
- (g) What proportion of the school budget do senior management teams believe is spent on CPD (i.e. cost of courses, cost of supply cover, cost of resources, etc.)? How is CPD defined in this context?

- (h) What are the most commonly identified CPD foci (i.e. how much CPD is accessed to support the curriculum, assessment for learning, leadership, etc.)?
- (i) Are there differences between the CPD accessed at different career stages or by different types of school?
- (j) What kinds of delivery modes are utilised (e.g. professional networks, courses, e-learning, etc.)?

Research design of the ‘State of the Nation’ study

In order to explore these questions a mixed-methods design consisting of three strands was developed and undertaken in 2008:

- a literature review of reports of empirical research into teachers’ professional learning and development since 2004 (see McCormick et al. 2008 for the full report);
- qualitative research with nine primary and three secondary schools (see Storey et al. 2008 for the full report);
- a survey of a national representative sample of primary and secondary teachers in England (see Opfer, Pedder, and Lavicza 2008 for the full report).

Literature review design and method

The TDA made it clear that the literature review strand should focus on the first two themes and not the third. The purpose of the literature review was to update previous work since 2004. Thus the research question guiding the literature review was: what is the evidence available from the reviews of empirical studies on the views of teachers (of various kinds and roles) on: (1) the benefits, status and effectiveness of CPD they experience and provide; and (2) the planning and organisation of CPD provided in and for schools?

A number of steps in the review process were followed. First, criteria for selection were drawn up; second, a search (both opportunistic and systematic) was conducted using the criteria; third, a selection from the searches was made; and fourth and finally, a review of the chosen items was carried out. This process resulted in a set of ‘record cards’ that were then used as the basis of this review. The elements of each of these steps will be described below.

Criteria for selection

It was agreed that each study reviewed should:

- be relevant to one or both of the two headings of benefits, status and effectiveness of CPD, and planning and organisation of CPD;

- focus on teachers' and school leaders' views on CPD (wherever it is undertaken);
- favour empirical, and particularly qualitative, studies;
- concern CPD in England (but with some account taken of UK and international studies);
- be published within the years 2004–2008.

These criteria were used at the initial sift in the search procedure (e.g. by rejecting any source that was outside the date period), and then at the penultimate stage of item selection for review.

Searching process for relevant items

There were two kinds of searching: one that was done opportunistically for major reports, and studies that were usually commissioned by government or other educational agencies – e.g. the TDA and the General Teaching Council for England (GTCE) – drawing on the research team's knowledge and that of the advisory group. In some cases the TDA provided internal documents, or at least those not available on its website. This opportunistic approach also included exhaustive searching of the websites of the Department for Children, Schools and Families (DCSF), TDA, GTCE and Current Education & Children's Services Research (CERUK), using titles as the main guide to relevant reports. This resulted in 28 reports being available for review.

The second kind of search was based on systematic searches of the educational databases, namely the British Educational Index (BEI), the Australian Educational Index (AEI) and the Education Resources Information Centre (ERIC). These gave access mainly to articles and conference papers. These databases were searched, using a variety of search words, for each of the publication years 2004–2007. The search words included: professional development, teacher professional development, teacher inservice/in-service, teacher INSET, teacher learning and teacher improvement. Large numbers of items (over 10,000) were cited in some of these searches and the numbers were reduced by using 'England' as a further limitation. Each of the lists of items was examined and items were selected based on title and abstract, where necessary, and 'long lists' prepared from these.

Selection of items for review

The long lists were further reduced and prioritised to enable a manageable number of sources to be reviewed in detail. The priority 1 list used the criteria 'b to e' in subsection 2.1; the priority 2 list relaxed the criterion related to 'England'; and the priority 3 list used the criteria 'b, d and e'

(i.e. it allowed non-empirical studies). In the event, the priority 1 list contained 44 items that were selected for review. There were nine items that had been included in the original priority 1 list, which had turned out on examination of the actual article not to meet the criteria, and four items that were not retrieved as they were unavailable conference papers or journals, and appeared to be marginal.

This gave a total of 28 reports and 33 articles and conference papers that were then retrieved from websites (those listed earlier for reports and Education-line for papers) and from the Open University Library (for articles). In all cases electronic copies were obtained. To these were added a set of four papers from our own research on Assessment for Learning (AfL) that reported on teacher learning and CPD in this context.

Review process

A review record was constructed and trialled, guidelines of the process were produced, and each member of the team was given an allocation to review. The resulting review cards for the sources were collected and analysed under themes related to the TDA questions. (Further details of the review process are given in Appendix 3 of the *Literature review report*, McCormick et al. 2008.)

Qualitative research design and methods (school snapshots)

The second strand of the research involved qualitative research with colleagues at 12 schools across England – nine primary (ages 5–11 years) and three secondary (ages 11–18 years). Schools were selected to reflect different types, allowing for size, location, sector and so on (see Storey et al. 2008 for more details of our sampling and qualitative research strategies). No attempt was made to generalise from the qualitative findings beyond the sample, although the notions of analytic (Yin 1994), naturalistic (Stake 1995) and fuzzy (Bassegy 2001) generalisations provide appropriate foundations on which to develop the wider relevance of findings such as those developed from the snapshot strand of the study.

Data generated from the 12 school site sources provided snapshots of perceptions and actions, set within specific contexts, and focused on aspects of the three core themes investigated during the period of data collection. We aimed to ‘drill down’ to understand in more detail the subjective perspectives of staff at different levels of the school organisation in relation to CPD. Another purpose of the qualitative work was to probe more deeply into some of the issues covered by the survey research and to focus on some of the areas that are largely absent or underdeveloped in the literature (Bolam and Weindling 2006).

These research gaps relate to elements such as: the links between CPD and performance management review processes; CPD and the 2007 *Professional standards* framework (TDA 2007a); and the ‘fit’, if any, between CPD and career-stage development and professional standards (see Pedder and Opfer 2010, in this issue).

The schools and their contexts

1. Green Hedge Primary School

This is an average-sized primary school of around 200 pupils serving local villages in a largely rural area in the Midlands. Created from the amalgamation of two village schools, Green Hedge occupies an attractive new site with purpose-built buildings in spacious grounds. Levels of social disadvantage are relatively low, as is the proportion of pupils entitled to free school meals. No pupil has a statement of particular need.

2. Bellwood Primary School

A community primary school serving a medium-sized town in the London commuter belt, Bellwood’s catchment intake is varied, with a large proportion of children drawn from social housing in former council homes, some now in private ownership. A mixed area of middle- and working-class families, the majority of children are from the latter. The majority also have English as their home language, but some have French, Gujarati, Bengali or Cantonese, and a very small number arrive with no English. Foundation-stage profiles show a low starting point for children entering school, but there is evidence of ‘value-added’ attainment, with some children performing very well by the end of Key Stage 2. The proportion of free school meals is well below average, the percentage of special educational needs (SEN) is in line with the national average, and the number of pupils identified as ‘vulnerable’ is high.

3. Ballandyne Junior School

This is a community junior school in the suburbs of a small city in the north of England with 214 pupils and 14 teachers (including the head teacher). Pupils come from a range of different social backgrounds and the school is surrounded by mixed housing. Pupils are mostly of white British background. The proportion of pupils with learning difficulties or disabilities is above average, as is the percentage of pupils with statements of special educational needs.

This is an established, successful, well-organised school. A 2006 Ofsted inspection judged the school a grade 1 (outstanding) for overall

effectiveness, with grade 1 for all the sub-categories except teaching and learning (grade 2). Pupils here make ‘outstanding progress’.

4. *Falcon Junior School*

This community junior school is situated in an economically and socially disadvantaged area of an army town in south-east England. There are approximately 240 pupils, including several looked-after children. The proportion of pupils with learning difficulties and disabilities and those with statements of specific needs is well above average.

The vast majority of pupils have white British backgrounds, but increasing numbers of pupils are arriving from eastern Europe, at an early stage of learning English. The number of pupils eligible for free school meals is well above the national average. A 2007 Ofsted inspection judged the school to be providing an acceptable standard of education; previously it had been in ‘serious weaknesses’. The quality of care and promotion of pupils’ personal development were noted as significant strengths. Pupils’ attainment in Year 3 is exceptionally low, and is still low at the end of Year 6, but their overall progress is judged satisfactory.

5. *Lofton Grange Junior School*

A junior school with 249 boys and girls in the north of England, this two-form entry junior school is uniformly white and largely working class, with roots in the now defunct local coalfields. Falling rolls – a natural demographic – may mean that two classes in each year group may not be viable in the future. The head teacher characterises the parental body as ‘passive’.

There are seven full-time qualified teachers, one of whom is male; none is an advanced skills teacher (AST) or an excellent teacher. There are two part-time qualified teachers and nine female learning support assistants (LSAs). The head teacher is also the CPD training manager. Aged 50+ she has been teaching for 33 years, five of these in her current post. She has postgraduate degrees and the national professional qualification for headship.

6. *Valley Road Primary School*

The school has over 800 pupils aged 3–11, from nursery to Year 6. Situated in Greater London, it has a higher proportion of pupils from minority ethnic backgrounds and those without English as their first language than most schools in England. All teachers and leaders who took part in the school snapshot describe it as a very supportive school.

As one senior leader reported, ‘No one is left floundering. No one.’ This was borne out in the accounts of the different teachers who were interviewed.

7. *Thomas Paine Primary School*

The school is housed in a light and spacious new building in an area of social deprivation in the north-east of England. It opened in 2002, amalgamating three previous schools. There is a swimming pool as well as out-of-hours community facilities on the site funded by the National Lottery. It is surrounded by council housing with indices of social disadvantage, including second-generation unemployment and a high proportion of free school meals.

Standards are well below average on entry and average on leaving. Ofsted reports this as a good school with strong, focused leadership and outstanding local partnerships. It is larger than average, with nearly 400 pupils aged 4–11. There are 17 staff, including an SEN coordinator (SENCO), a hearing impaired teacher, and some part-time staff. Most pupils are white and nearly a quarter are on the SEN register – a higher percentage than average.

8. *Redway First School*

Housed in a traditional Victorian building near the town and the sea, the school runs its own after-school club and breakfast club on the premises and has links with Sure Start. The socio-economic context of this school in the north of England is mixed since the town is an area of deprivation but near an affluent coastal pocket. This is reflected in a number of transient children living in temporary bed and breakfast accommodation set alongside new-build housing. There are 210 pupils on roll aged 3–9. Standards are lower than average on entry and above average on leaving, this being credited to good teaching and extremely strong specialists from the locality and region.

9. *St Mark’s Primary School*

This is a one-form entry school in the north-west of England, taking children from foundation through to Key Stage 2. There are 220 boys and girls, almost entirely white working class, but with a few children of medics from the nearby hospital; 30% of students are eligible for free school meals. There are eight full-time equivalent (FTE) teaching staff, predominantly female, and six are over 50 years of age. Two of these, including the head teacher, who is also the training manager, are 60. The head teacher is retiring at the end of the summer term after 34 years’

teaching, 21 of these as a head teacher. There are only two candidates for her post. There are five FTE classroom assistants.

The age profile of the teaching staff and their long service at St Mark's mean that many parents of current students were also taught by them. This is seen to contribute to a strong family feel within the school. The school is in deficit to the tune of £50,000. Because of the age profile of the staff, with most being at the top of the salary scale, the current salary bill does not help to reduce the deficit. The school has no ASTs or excellent teachers. A 2008 Ofsted report gave it grade 2 ('good') across the board, with a couple of provisos.

10. Heatherstone High School

Heatherstone is a very large 11–16 comprehensive in the south of England, near to a popular seaside town. Pupils come from a wide range of backgrounds, with a lower than average proportion entitled to free school meals. Most pupils are white British and only a few speak English as an additional language. The proportion of pupils with learning difficulties, statements of special educational needs or disabilities is below average. The school has specialist status for sport and is the centre of a school sports partnership with local primary and secondary schools. It holds Healthy School and Sportsmark Gold Awards. It is a designated eco-school, a European Project school, and an Enterprise Pathfinder school.

In 2007, an Ofsted inspection rated the school as 'good and improving with some outstanding features'. It characterised the head teacher as 'charismatic', 'committed', and 'well supported by the senior leadership team' and observed that 'parents and carers are very supportive' in what is 'a popular choice' of school by them. Heatherstone is also a specialist training school that takes students from a number of universities in the area.

11. Droley Comprehensive School

This is a large suburban 11–16 mixed comprehensive. When the school was last inspected by Ofsted there were 1273 pupils. The percentage of pupils eligible for free school meals is about half the national average. There are few minority ethnic children or children with English as an additional language. The percentage of those with special educational needs is less than the national average, and those with statements approximately at the national average.

As well as the 90 teaching staff there are 16 learning support assistants, two assistant year managers in pastoral support, seven speech and language staff, three foreign language assistants and 20 technicians. The

Speech and Language Centre staff form part of the school and also offer services to the town and surrounding rural area. The leadership team comprises a head teacher, three deputies and three assistant head teachers.

12. Rockcliffe High School

This girls' grammar school occupies a very small site in a town centre by the sea in the south of England. It has buildings dating from about 1920, and some office space and music teaching in a neighbouring house. Sports facilities are poor. There are 741 pupils, with 161 in the sixth form.

In 2007 an Ofsted inspection awarded a grade 1 (outstanding) for every one of 41 inspection judgements except for 'the attendance of learners' (an arithmetical statistic, missed by 0.1%). The school was described in the report as having a 'calm and tolerant atmosphere' and a learning context where 'behaviour is exemplary'. In September 2007, the school was designated a specialist humanities school with an objective of strengthening community links.

The school was the unit of analysis on the assumption that the school – through its ethos, its custom and practice, its culture, its leadership policies and practices, and its recent history – shapes CPD processes and systems and teachers' perceptions of these.

The data-collection process

Interviews, focus group activities and discussions formed the two main qualitative data-collection strategies. Questions for the interview schedules were arranged into focus areas and amplification or prompt/follow-up questions devised for each of these areas. School-linked and other documentation provided a third source of data.

These data were sorted and analysed to address, in more depth, key aspects of the three questions that related to teachers' perceptions of CPD. The methods of data collection used in the qualitative study were trialled in three schools before the project began, and advice from teachers in these schools relating to improvements in content and process was discussed and utilised.

Each data-collection school was visited for one or two days (hence our term 'snapshots'), depending on size. Teachers (up to eight in the larger schools) were interviewed. Data were sought from a range of career stages and roles (e.g. head of department, curriculum area, union representative, leader of CPD) and, where possible, part-time teachers.

A focus group meeting in each school also took place, each consisting of four to eight members. The groups provided new data not covered by

the interview, typically from union representatives, supply or part-time teachers, teachers with 'Every Child Matters' or personal, social and health education (PSHE) responsibilities, teachers from groups not selected for interview, and so on. They also included teachers at distinct career stages.

The focus group sessions involved three structured activities and a follow-on discussion. Sixty-five teachers were interviewed; new sources of data in the focus groups were 64, totalling 129 different sources of qualitative data in the schools. (Further details of the data-collection instruments can be found in the *Qualitative research report*, Storey et al. 2008.)

Survey aims and design

The survey strand of the 'State of the Nation' study was designed to capture a nationwide sample of teachers, head teachers and schools to identify patterns of variation in the CPD practices, values and beliefs of teachers at primary and secondary schools in England. Two questionnaires were administered: a teachers' questionnaire and a leader questionnaire. Teachers and head teachers were asked to complete the teacher questionnaire. This survey is described in detail below. Head teachers and other members of senior leadership teams, including CPD leaders, were also asked to complete the leader questionnaire. This asked for additional demographic information about schools related to pupil background characteristics, staffing levels and staff turnover. They were also asked about the allocation of resources to CPD and to record their value-for-money judgements about different kinds of CPD in relation to impact, format, focus and activity.

Sample

The survey set out to draw a nationally representative sample of teachers for participation. The sample was drawn from the total number of schools using a 5% confidence interval (CI). To be able to determine the number of schools required in the sample we used the student/teacher ratios for every geographic area and the average school size (number of students) in England, since average school size was not available for each region. Using these numbers we estimated the number of teachers per school within a region and calculated the necessary number of schools to be sampled; 329 primary and 59 secondary schools were selected for the study, making 388 schools overall. The final school sample was randomly selected from a database and the sample was checked for appropriate representation of school types by region. The only difficulty was in selecting academies, because there were only a few of them compared to

the numbers of other school types in 2008, and most of these were in the London area. All academies were included in the sample. Independent schools were not included.

Response rate

Our overall response rate for the survey was 39%, with 56% of secondary schools and 36% of primary schools responding. While a 39% response rate (151 schools) is not considered statistically generalisable, it is on the high end of the range of response rates reported in recent literature – significantly larger than previous studies of teacher professional development in England and proportional in size to similar studies conducted in the United States. The response rate from secondary schools of 56% (33 schools) is approaching statistical generalisability, where 50% is considered adequate and 60% is considered good for conducting analyses which assume generalisability. The secondary school response rate is especially high in the current research context where a 36% response rate has become the average. Overall, 1126 teachers' surveys were returned by teachers and senior leaders in participating schools. In addition, 251 leaders' surveys were returned by senior leaders in the same participating schools.

Response rate for large, national surveys is becoming more and more of an issue for conducting research of this kind. In spite of attempts to increase response rates with a variety of techniques, Dillman et al. (1999) suggest that response rates for all kinds of surveys have been declining since the early 1990s. This tendency especially accelerated after the emergence of web questionnaires. People are receiving an increased number of solicitations to participate in research studies or marketing research, and they are becoming less likely to respond. A meta-study of 68 surveys in 49 studies by Cook et al. (2000) found an average 39.6% response rate among these studies. Similarly, Schonlau et al. (2001) reviewed studies and examined their response rates, and found that they ranged from 7% to 44%. The *response fatigue* discussed as a reason for decreases in response rates is particularly applicable to developed countries such as the UK and US, where people are frequently asked to complete various questionnaires. With recent increases in testing and accountability reporting requirements, teachers and schools more generally are, perhaps, particularly susceptible to response fatigue.

Despite these issues, low response rates may not always suggest bias in the result and researchers can apply a variety of techniques to deal with non-response (Dey 1997; Groves et al. 2001).

At the school level, responding schools mirrored schools in the country as a whole within $\pm 3\%$ on school level, school type, location,

achievement band and proportion of pupils qualifying for free school meals. There was some deviation from expected proportional response by region with more responses received from the north-east (+15%) and south-east regions (18%).

Comparing the demographics of responding teachers to national population estimates, we found that responding teachers match national proportions within $\pm 2\%$ on: ethnicity, gender, school level of employment, position type, career stage and years of experience. A closer look at teacher ethnicity provides a good example of the closeness of our achieved respondents to the population. According to Department for Education and Skills (DfES) statistics in 2005, 91% of teachers identified themselves as White British, 2% as Asian, 1.5% as Black and 0.5% as Mixed. Of teachers responding to our survey, 91% identified themselves as White British, 1.5% as Asian, 1.1% as Black and 0.4% as Mixed.

With such close matches between respondents and population estimates at both the school and teacher levels of our sample, we feel confident that the study presented here does represent national patterns of teacher learning and professional development in England.

Survey design

The teachers' survey was designed to generate systematic quantitative data. Questions were shaped by a concern to understand more about the following facets of CPD:

- the role of teachers' beliefs in CPD choice and impact;
- teachers' CPD values and practices;
- CPD content, delivery, duration and form;
- school conditions for supporting CPD;
- individual and school-level barriers and access to quality CPD for teachers.

The teachers' survey built on reliable and valid instruments that Opfer and Pedder had developed and used in recent large-scale research studies (Pedder et al. 2005; Pedder 2006; Opfer, Pedder, and Lavicza 2008; Pedder and MacBeath 2008). The surveys are available for download at two sites: <http://www.tda.gov.uk/upload/resources/pdf/a/appendix2teachersurvey.pdf> and <http://www.tda.gov.uk/upload/resources/pdf/a/appendix3leadersurvey.pdf>.

The survey was structured in four main sections, each focusing on a theme that reflects the facets of CPD mentioned above:

- Section A: Professional learning practices and values (14 questions).
- Section B: Continuing professional development (14 questions).

- Section C: Organisational practices and systems (24 questions).
- Section D: Teacher background characteristics (7 questions).

Section A of the survey focused on individual learning practices and values for professional learning. Teachers were asked to make two kinds of responses to 14 questions. The first response focused on teachers' professional learning practices in which they are engaged. Staff could choose from the following response categories: not true, rarely true, often true and mostly true. The second response in Section A focused on their own values, indicating how important they felt a particular professional learning practice was for them. (See Table 1 for an example of this dual scale format.) The response categories were: not important, of limited importance, important, or crucial.

The dual format of Section A described above (and also used in Section C) takes into account our understanding of the methods literature on ensuring reliability of teacher self-report. Self-reports of instructional practice have generally been found to be consistent with other measures such as observation and classroom artefacts, when teachers' descriptions are linked to specific practices and activities (Smithson and Porter 1994; Burstein et al. 1995; Mayer 1999; Rowan and Correnti 2009). Teachers' self-reports tend to be less reliable when they are asked to provide quality judgements about practices, or when they are asked about pedagogical concerns not tied to specific practices. Thus, the format tying teacher values about a practice to a specific description of a practice should result in more reliable estimates of teachers' beliefs than questions that ask them about their values in the absence of practice.

Section B consisted of 14 items related to different CPD activities: levels of participation; reasons for participating; organisation, planning and leadership; opportunities for professional growth; content; processes; and benefits and impact of different kinds of CPD activity.

Following Garet et al. (2001) and Desimone (2002), we asked teachers to report on the features of their professional development activities in two ways. First, we asked them to describe the professional development activities in which they had participated in the last 12 months, and then we asked them to choose one activity to describe, on which they had spent the most time. For all the CPD activities and the chosen CPD activity, we asked them to describe the activities in relation to the features of 'effective' professional development identified by Garet et al. (2001) and Desimone (2002). Additionally, for the activity on which teachers spent the most time, we asked them to describe the activity in terms of levels of participation; reasons for participation; organisation, planning and leadership; opportunities for professional growth; content; benefits; and impact. The 12-month time period was used for these questions of activity because other researchers have demonstrated that, when surveyed at the

Table 1. Example of dual scale format used for Section A of the SoNS Teacher Survey.

ABOUT YOUR PRACTICES How true of your professional learning are these practices?		ABOUT YOUR VALUES How important are these practices for creating opportunities for pupils to learn?						
Not true	Rarely true	Often true	Mostly true	Section A	Not Important	Of limited importance	Important	Crucial
				I carry out joint research/evaluation with one or more colleagues as a way of improving my practice				

end of a year, teachers have good recall of practice for that given year (Porter et al. 1993; Gamoran et al. 1997).

The focus of Section C shifted to organisational practices and systems for supporting teachers' professional learning. Teachers were asked to make two kinds of responses to 24 questions. (See Table 2 below for an example of the dual scale format used in Section C.) The first response focused on teachers' perceptions of practice and the extent to which they regarded a particular practice as happening, or not happening, in their school. Staff could choose from the following response categories: not true, rarely true, often true or mostly true. As in Section A, they were then asked to make a second response, this time about their own values, indicating how important they felt any given school-level practice was in creating opportunities for them, as teachers, to learn. The response categories were: not important, of limited importance, important, or crucial.

In Section D teachers recorded a range of demographic information allowing for comparisons to be made between teachers according to length of experience, career stage, level of leadership responsibility, gender, ethnicity and disability or special educational needs (SEN) status. To compare teachers' responses based on their school characteristics, we distinguished between the following: region, sector, location and achievement band.

Data-collection procedures

In administering the survey, we identified a member of the senior leadership team at each of our sampled schools to act as school contact for the project. Surveys were mailed to these contacts, who had responsibility for administering and collection of the completed questionnaires. The local school coordinator then mailed the package of completed questionnaires back in a postage paid envelope and the responses were entered by scanning. Combining posted letters, postcards, telephone calls, faxes and emails, we maintained a regular, focused communication strategy with schools through a series of repeated contacts to encourage response. An honorarium of £100 was also offered to participating schools in order to optimise response.

Analysis of the different data-sets

Our initial analysis of qualitative and quantitative data-sets focused on developing descriptive insights in order to address the research questions included in the TDA tender specification. As we considered insights from the literature review strand and brought them together with findings from quantitative and qualitative data-sets, it became

Table 2. Example of dual scale format used for Section C of the SoNS Teacher Survey.

ABOUT YOUR SCHOOL How often is this true for your school now?		Section C		ABOUT YOUR VALUES How important are these practices for creating opportunities for you to learn?		
Not true	Rarely true	Often True	Mostly true	Not Important	Of limited importance	Crucial
School systems encourage impact evaluation of professional development activities.						

evident that the policy implications of our descriptive findings were significant. In this special issue, we bring together and summarise findings from a descriptive analysis of our different data-sets, and set out explicit recommendations for policy and practice in relation to each of the main themes.

In analysing the results from our three data sources, we were primarily interested in identifying overall patterns and themes emerging from the data rather than focusing on the analysis of variables in isolation. To aid in this thematic analysis and also to reduce the number of variables involved, exploratory factor analysis was conducted on Sections A and C of the survey. These analyses allowed us to identify sets of common values and practices related to professional learning at both the individual and school levels. Details of the development of these factors and reports of their analysis appear in Opfer and Pedder (in press) and in Opfer et al. (in press a and b).

We used cluster analysis of our survey data to identify distinctive groupings of teachers across our sample according to the values and practice scores they recorded for the different dimensions of professional learning identified through factor analysis of teachers' responses to items in Section A of the survey. We carried out separate cluster analysis to identify distinctive groupings of teachers according to the practices and values they recorded for items in Section C of the survey related to organisational systems and conditions in schools for supporting teachers' professional learning.

Through using cluster analysis we were able to compare schools in terms of the different 'mix' of practices and values held by their teachers on all dimensions of interest. A key step towards understanding the extent and nature of diversity both within and between schools, and the challenge such diversity raises for schools in developing effective CPD programmes, is to map differences between schools and among different groups of staff within schools in terms of their practices and values.

The next steps in our analysis involve us integrating analysis of qualitative data from the school snapshots with quantitative analysis of our survey data based on the outcomes of our factor and cluster analyses. In future analyses we aim to develop distinctive and contextualised representations of the profiles of our snapshot schools in relation to the practice and values responses of their staff for the professional learning and organisational systems sections of the survey. In doing this, we shall examine the qualitative data developed with colleagues at each of our snapshot schools in order to understand and compare, in greater contextual detail than is possible with survey analysis, the structures, cultures, practices and values that underpin CPD policy and leadership at different snapshot schools.

However, in our other analyses and writings, we have extended beyond these mainly descriptive kinds of analyses in order to develop and test a conceptual model of teachers' professional learning. The focus of analysis here has been on our survey data. In developing our model of teachers' learning, we aimed to specify three types of influence, each involving the teaching and learning practices of teachers. We also aimed to conceptualise dynamic processes of interaction among them. Individual teacher influences encompass their prior experiences, their orientation to and beliefs about learning, and how these are enacted in their classroom practice. School-level influences involve the contexts of the school that support teaching and learning, the collective orientations and beliefs about learning, the collective practices or norms of practice that exist in the school, and the collective capacity to realise shared learning goals. Finally, because we were interested in teachers' professional learning, we included in our conceptual model the influences of the learning activities and practices in which teachers take part. The model is specified in greater detail in Opfer and Pedder (in press) and Opfer et al. (in press a and b).

We propose that the relationships between values and practice enacted at the individual teacher level re-enact themselves at the school level, creating joint or socially produced conditions for teacher learning – a school-level orientation to professional learning. Thus while an individual teacher's decisions about professional learning may result from a confluence of teaching practices, values and past experiences, school-level decisions about professional learning may result similarly from the interaction of systems, supports and collective values about learning. Moreover, these collective values and decisions about school-level learning then influence heavily individual values and decisions about learning. Further, while an individual teacher's orientation may lead him or her to participate in professional learning activities, the access, support and encouragement to participate are heavily determined by the school.

Thus, our conceptual model suggests that we cannot understand teacher learning by investigating these influences on teacher learning in isolation from one another. To understand and explain why and how teachers learn, we must consider how a teacher's individual learning orientation interacts with the school-level learning orientation and how both of these orientations together impact the activities (and features of activities) in which teachers participate.

Figure 1 incorporates the three influences that have been shown to mediate teachers' learning: features of the learning activity, individual learning orientations and school-level learning orientations. The non-linear structure of the model recognises the amalgamation of practice, learning orientations, and individual and collective learning contexts that must occur for teachers' learning to take place. We believe that this

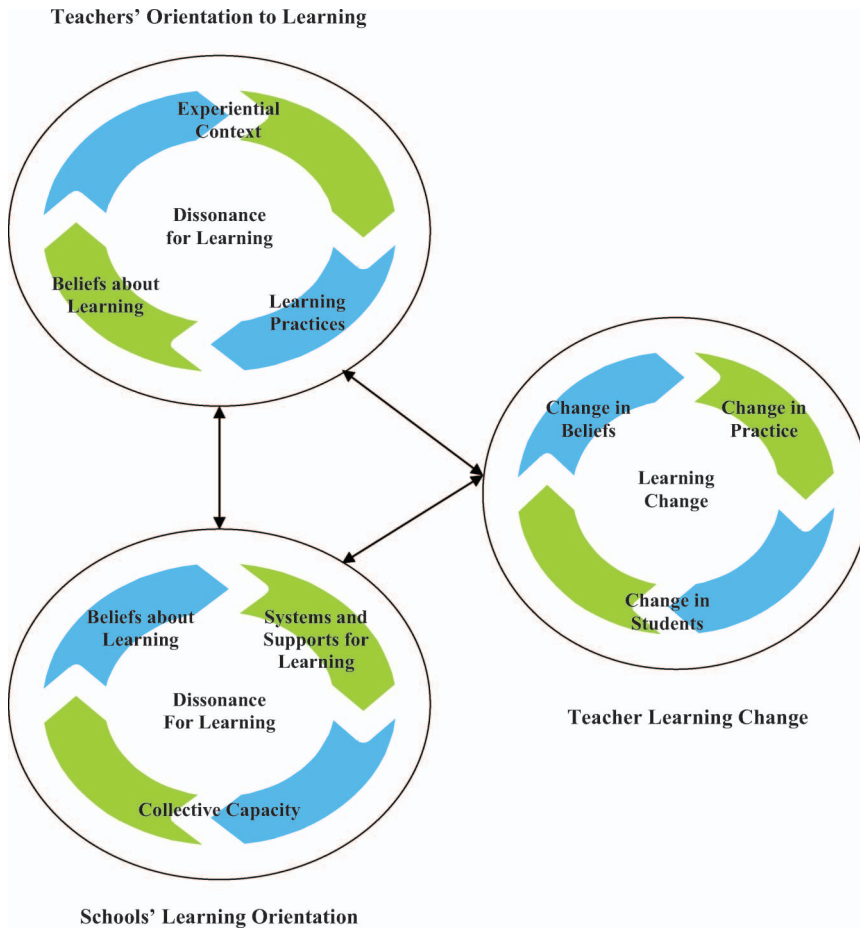


Figure 1. A dynamic model of teacher learning.

model, while complex, better illustrates the multi-causal and multi-dimensional nature of teacher learning, but it also has implications for how we investigate teachers' learning.

We have reported development of the conceptual model and the methodological implications for investigating teachers' learning in detail elsewhere. We have also reported the results of our testing of the model through the use of structural equation modelling procedures (see Opfer et al. in press a and b).

The following four articles in this special issue draw together relevant data from our different data-sets to consider a set of broad issues and recommendations for policymakers and practitioners. In order to avoid unnecessary repetition, summaries of our research design and methodological thinking in each of the following articles are brief. Readers are referred back to the relevant sections of this introductory article for more detailed presentation and discussion.

In the next article in this collection, McCormick reports findings from the literature review strand and considers evidence from empirical studies conducted since 2004. In our third article, Opfer and Pedder report findings linked to policy issues and recommendations related to the benefits, status and effectiveness of CPD. Pedder and Opfer then focus on policy issues and recommendations in relation to the planning and organisation of CPD. In the fifth article Opfer and Pedder examine policy issues and recommendations associated with teachers' access to CPD.

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Note

1. Schools and Continuing Professional Development (CPD) in England – State of the Nation research project (T34718) was directed by David Pedder (University of Cambridge) and co-directed by Anne Storey (Open University).

Notes on contributors

David Pedder is currently a senior lecturer at the University of Cambridge Faculty of Education. His teaching and research interests are concerned with understanding processes, practices, perspectives and conditions that support improvement in teaching and learning in schools and classrooms. He conducts research with teachers and students in primary and secondary school and classroom contexts. He uses qualitative and quantitative research methods to test and develop understandings about innovation in classroom teaching and learning, teachers' professional learning, and school improvement.

V. Darleen Opfer is a university senior lecturer in research methods and school improvement at the University of Cambridge. She has research interests including interest group influence, the political aspects of policymaking, and the impact of national policies on schools, teachers, and students. She has completed both large- and small-scale policy evaluations for national and international agencies. Funded research projects have included the impacts of accountability policies and teacher professional development on teacher practice, schools' efforts to close achievement gaps, and teacher and head teacher mobility and attrition.

Robert McCormick is an emeritus professor of education and has worked in the areas of curriculum, assessment, teacher learning and ICT in education. He is currently involved in research on a teacher development project in Bangladesh.

Anne Storey has now retired from the Open University, where she worked on the PGCE programme and specialised in research on teacher professional development.

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