

## Chapter 2

# Lesson Observation: Policies and Contexts

**Abstract** In this chapter, I focus on presenting the economic and historical context of lesson observations. I begin with an overview of research about lesson observations from a global perspective. In setting the scene, I provide a brief summary with examples from Australasia examining the differences in surveillance and audit requirements placed upon educational sectors. Next, I discuss the historical summary of the political and social context of observations in England. I explain how issues of accountability and performativity are relevant concepts to explore in greater detail because observations have in some ways become a political tool so that education is seen as ‘responsive’ to demands from stakeholders. Pressure on individuals from these Neo-liberal policy changes including the need for education to become more accountable and policies transparent has become a contentious issue, triggering industrial disputes. These issues form the backdrop to highlighting the value of this book in exploring the UK context. It also provides insights into the complexities of individual lived experiences of observations, in terms of the harmful impact on professional identity. The reasons for the potential stress and anxiety within managerial strategies such as observations are outlined in the final section of this chapter, before summarising these contexts and drawing conclusions.

### Lesson Observation: Global Commercialisation

As I summarised in Chap. 1, educational sectors of all kinds with a student-centred ethos are increasingly pressurised by New Right, neo-liberalist politics. The extent to which tensions are visible and debated is equally varied. But increasingly, the commercialisation of educational environments through various measurable outputs is gaining emphasis and creating pressures on micro- and macro-levels (Roberts 2007, p. 350). The growing globalisation of educational opportunities (both geographically and virtually) includes a transparency of data designed to inform potential customers who can weigh-up aspects of effectiveness, value-for-money and quality of experience. However, as commented in the previous chapter, when

the ideology of learning as intrinsically emancipatory collides with an accountability agenda, tensions are inevitable. This is especially relevant within situations that attempt to “draw a straight line” between learning outcomes and teacher effectiveness (Skourdombis and Gale 2013, p. 894).

This book explores one important strategy that attempts to measure teacher effectiveness. In England, teachers at every stage of their career and within all sectors are familiar with these strategies: formal, alpha/numerical-graded lesson observations. These are widely used in many different educational environments to measure and improve the content and quality of pedagogical delivery and support professional development. Formal lesson observation policies take many forms, and the third section of this chapter will summarise what these forms are within UK FE, within the framework of the international literature.

One of the many drivers of the marketised environment within which educational systems must now compete with each other are results from the Organisation for Economic Co-operation and Development (OECD) and specifically their published Programme for International Student Assessment (PISA) (OECD 2015). Global rating and measurement systems such as PISA play a major part in the increasing analysis of the perceived quality and effectiveness of education through rankings in league tables (Takayama 2015). Published triennially, the PISA results consist of data from standardised tests conducted on 15-year-old students in over 70 countries. It is hardly surprising that positioning countries with different cultural contexts in terms of high/low academic achievers from this ongoing assessment is controversial, although many educationalists argue it is a valuable tool *in conjunction* with other measurements (Takayama 2015). In 2014, an open letter to PISA signed by numerous international academics was published in the UK newspaper, The Guardian (Meyer 2014). The letter criticised the results collected by PISA because of the way these quantitative outcomes could be unfairly levered by individuals and organisations for commercial gain. It seems inevitable that educational outcomes in the form of results like these are used for promotion purposes and commercial gain, which in turn emphasise marketised forces, especially when the OECD itself holds no overall objectives towards improvements in educational systems.

Like the more micro-level aspects of quality-control measurements in classrooms such as lesson observations, these kinds of entirely quantitative education data seem over-reliant upon outcomes which lack the social, historical and cultural contexts (James and Biesta 2007). Indeed, Harris and Zhao (2015) observe how the data itself are flawed because (reflecting the arguments against the UK eleven-plus assessment) the test questions are biased in the way they are presented and assessed. Hence, it is important to raise the issue of the way that external, global measurements of educational systems are published because it is these data which form the engine that drives the need for institutions of all kinds to compete in the international marketplace. Yet ironically, these same measurements may be contributing to a polarised landscape of inequalities in education (Ball and Youdell 2008).

Fundamental to this marketised environment is an acceptance that the concept of an aspiration towards (to use a phrase from the UK Government’s rhetoric)

‘continuous improvement’ is a universal good. However, it is worthwhile problematising this phrase. As O’Leary (2012) points out, ‘continuous improvement’ is often defined as distance travelled when examining statistics which are themselves questionable. The continually moving goalposts from government in terms of how success is ‘measured’ exposes more problems in the debate by reducing the sense of control that teachers’ feel over how their practice is defined and measured. This lack of control is a partial contributing factor of the stress and anxiety caused to some staff by observations, as I explain later in this book.

There is also the issue of how this kind of quantitative data is presented and interpreted, for instance some countries may not have the resources or national capital with which to respond to the PISA judgements (Lingard and Jn Pierre 2006). Media may report a country’s progress, but restrictions in freedom of speech, and/or media bias may distort these data. Similarly, the limitations in quality research institutions available in some countries can restrict policy developments which may otherwise have been strategic in enhancing educational equality and outcomes. It is also important to note how, from some perspectives, ‘continuous improvement’ is not widely accepted because of cultural differences in *how* success is perceived. In some countries, the ideology of quality means the concept of ‘continuous improvement’ may not be viewed as aspirational or achievable. For example, in Australasian culture, the phenomenon of ‘Tall Poppy Syndrome’ makes it difficult for individuals to be outstanding in their field and accept acknowledgements of achievements. This is because it risks unsettling individuals or even causing feelings of resentment from those who may fear change or competition (Kirkwood and Viitanen 2015). I return to these issues in my concluding chapters.

In order to frame some of the unique aspects of lesson observations within England, where the research for this book was situated, it is useful to first summarise policies and practices surrounding quality control, assurance and CPD of teaching and learning elsewhere, especially in countries where audit cultures are, by comparison, currently less formal and therefore less corrosive. For illustrative purposes only, I therefore briefly outline the situation in some Australasian contexts and use some examples which I later draw on to compare and contrast with the UK research which forms the basis for this book.

## Observations in New Zealand’s Education System

The New Zealand’s government department that evaluates the education and care of students, the Education Review Office (ERO) is similar to (and partly modelled on) UK Ofsted (Thrupp 1998). I fully explain the details of Ofsted in the sections below, but is important to remember how interpretations of accountability, and indeed of our own roles within these procedures, are seen differently in different cultures (Bourdieu 1991). ERO reviews—like Ofsted—are collated into institutional and national reports that provide benchmarking information to boards of trustees, managers of early childhood education services and the Government on

the quality of education provided. Unlike Ofsted, however, ERO does not (currently) report on tertiary education sectors, only schools and early childhood services (ERO 2015). Research has asserted how ERO reports are distinct from Ofsted equivalents, because they are subjected to numerous conversations between the institutional representatives involved, before being formally ‘agreed’ and subsequently published. This illustrates how, although controversial in nature, in these situations a space is available for professional dialogue which may explore the contexts of these learning centres (Thrupp and White 2013, p. 29).

There are approximately 150 New Zealand ERO’s Review Officers who undergo extensive training and have powers to initiate reviews, investigate, report and publish findings on the provision of education in line with the requirements of the NZ Education Act 1989. These reviews include observations of lessons and supporting classroom documentation such as lesson plans. Schools and early childhood services are usually reviewed once every three years. Where schools or centres are found not to be performing to the required standard, reviews may be more frequent, e.g. annually. Correspondingly, where a school has an established reporting history and demonstrates good processes of self-assessment and achievement, then ERO reviews are less frequent (e.g. every five years). However, learning outcomes and auditing procedures of student achievements have been criticised as lacking in close scrutiny and levels of accountability are considered low compared to the UK (Morris and Paterson 2013). The potential for expanding the ERO inspection regime to tertiary institutions is uncertain.

I have commented elsewhere (Edgington 2015) how educational language in New Zealand surrounding what may be perceived as ‘good teaching’ or ‘best practice’ seems less weighed-down with rhetoric, partly because those debates are still in a developmental stage (Thrupp 2014; Thrupp and White 2013). For instance, publicly available National Standards in teaching were only recently introduced (in 2012). EROs measurement strategies therefore now include controversially defined Overall Teacher Judgements (OTJs) that are graded against a four-point scale, all too familiar to the reductionist approach I experienced in the tertiary sector from UK’s Ofsted. But in contrast to the UK environment, there has been some considerable resistance to the New Zealand Ministry of Education’s implementation of institutional SARs. In particular, nearly half of all schools expected to report the Māori-medium version of data—*Ngā Whanaketanga*—did not submit this requirement in 2013 (Thrupp 2014). This is partly because accountability of this nature—and its potential consequences—contradicts the Māori philosophy of a more holistic approach to the curriculum—and learning in general (Edwards et al. 2007). Furthermore, it raises important questions about the interpretation of words and phrases that surround teaching and learning practice that aim to encourage a multicultural approach (Heaton 2011).

As I explain, tertiary education sectors worldwide have been subject to tremendous change, and a particularly influential driver of this change continues to be the audit culture of quality assurance processes (Ball and Youdell 2008). This is because educational outcomes from organisations like the OECD’s PISA reports form apparently comparable competitive data. External audits of accountability are

therefore evolving to reflect internal policies that aim to bring together evidence from all stakeholders, specifically student outcomes and evaluation data. Another (fairly recent) example of this accountability is found in the university sector, which has potential consequences for 'spill-over' into the FE sector.

Universities in New Zealand are inspected by Tertiary Education Commission (TEC) and also the Academic Quality Agency (AQA). The AQA conducts audit cycles in five-yearly reviews, which, like the UK Ofsted inspections of schools and colleges, includes an analysis of the institutions' SARs against evidence of policy and student outcomes. Their objective is to act as a quality assurance organisation, by benchmarking aspects of policies, guidelines and outcomes against research-informed best-practice. According to their website, the "Key principles underpinning AQA academic audits are: peer review, evidence-based, externally benchmarked, and enhancement-led." (AQA 2015). Tertiary institutions not classified as Universities (e.g. Polytechnics) are not covered by the AQA and instead fall under surveillance from the Tertiary Education Commission (TEC) and the New Zealand Qualifications Authority (NZQA). This indicates a separation of different types of teaching and learning and how these may be assessed for quality outcomes.

Investigating TEC and AQA's criteria for teaching quality in their respective sectors reveals some complexities and recent developments. Because tertiary education in New Zealand has not yet been fully gripped by the neo-liberal model compared to other educational sectors overseen by ERO, criteria for judging and enhancing teaching quality in terms of delivering learning outcomes or assessments, appear vague or even absent altogether. Examining the annual reports from TEC, for example, reveals student achievement criterion is not always clearly defined and auditing regimes that confirm such statistics are not (yet) part of agency briefs. It is also crucial to note that despite claims of close affiliations with similar organisations such as Higher Education Authority (UK HEA) and APQN (Asian Pacific Quality Network and the International Network for Quality Assurance Agencies in Higher Education (INQAAHE), there is no explicit objective connecting the criteria or collection of evaluation data about the quality of teaching by lecturers through lesson observation. Nonetheless, other aspects related to teaching quality are often evaluated instead. The evaluation of teaching per se can be shrouded in secrecy in some universities in New Zealand, where, other than data from learning outcomes, the only evidence of teaching quality is via student evaluation questionnaires, which are often retained by the teacher/lecturer concerned and defined as confidential documents (Hendry and Oliver 2012). Below is an extract from the AQA report from a New Zealand university which illustrates this point:

The Self-review Report states that Deans are responsible for monitoring individual staff performance but *both the Self-review Report and staff interviews confirmed that the only person who sees an individual's teaching evaluation is that individual, unless the individual is applying for promotion.* The Panel has *serious concern* about this approach and the University itself indicated it is likely to review this policy in the near future. Information about an *individual's teaching performance must reach the Head of School/Department* at least to enable him or her to act constructively (whether to commend good teaching or to

address any performance issues). So long as evaluation information remains only with the person being evaluated there is a *substantial risk to the University that it is unable to detect or address unacceptable performance* (AQA 2015, p. 48, my emphasis).

It can be seen from this quotation that student evaluation is directly connected to perceptions of staff competence. This is in contrast to the UK perspective, where arguably the emphasis is placed on *teacher performativity*. One of the continuing concerns about the sole use of student evaluations as a monitoring tool for teaching quality in an Australasian tertiary context is shared by educationalists in the UK context: students' answers might be manipulated by strategic questions set out by the lecturer. Seeking feedback on aspects of the teacher's performativity already acknowledged as 'stronger' than others can unfairly skew the data, compared to a more valid, cross section of the whole learning experience (Boud 1995; Hendry and Oliver 2012). When we consider that often these data are used by the academic staff in Australasian institutions specifically for their own promotion application purposes, the original objectives of sincere collection and reflection of students' evaluation data about teaching and learning quality seem to have lost its way (Barnard et al. 2011).

In a vocational institution reflecting more closely the context of the UK FE sector, the Bay of Plenty Polytechnic's peer observation scheme is embedded in its 'staff teaching competency framework' for CPD purposes. Staff reported positive results because of the opportunity to share and discuss their pedagogical approach and enhance assessment strategies. Research outputs from these initiatives are in development (Honeyfield 2015). Crucially for the focus of this book, the success of that initiative is largely attributed to the 'buy-in' of staff through their *voluntary participation* and the choice of whether or not to use formal documentation during the process. However, a common theme from the lead academics involved in these projects is how staff are motivated to engage with the initiatives not through intrinsic student-centredness but instead, when emphasis is placed on individual promotion opportunities (Hatzipanagos and Lygo-Baker 2006; Hendry and Oliver 2012). Reflecting and evaluating teaching and learning for learnings' sake rather than teacher performativity often seems missing from these accounts, which contrasts with the outcomes from the UK-based research presented in this book.

## Observations in Australian Tertiary Education

There are also limited formal requirements in many Australian tertiary institutions, including Technical and Further Education (TAFE) sectors, for reporting outcomes of formal teaching and learning observations—from management or external bodies. However, some have also developed informal strategies. The literature surrounding these initiatives—which are mainly case studies—is sparse. However, it is clear that there is increasing pressure for peer review observations to be used as part of a toolkit in addressing institutional needs for an open commitment to enhanced

teaching quality. Although peer review is not the focus of this book, it is interesting to see how these initiatives have progressed in various institutions. For example, from the university sector, Hendry and Oliver (2012) report on a peer-observation scheme at the University of Sydney aimed at early career academics. Staff supported the value to their teaching practice in engaging in professional dialogue with more experienced teaching staff. Similarly, Barnard et al. (2015) undertook an action research project with volunteer participants at Queensland University Technology (QUT). The project used the theoretical framework of ‘communities of practice’ (Hughes et al. 2007; Lave and Wenger 1991, 1999) to attempt to lessen the perceived power relationships often present within the observation situation. The success of this particular action research project has led to the adoption of some the processes of peer review observation being integrated into the QUTs CPD programmes for academic staff.

However, outside the university sector, examples from TAFE are rare. Reasons for this are unclear, although cultural factors undoubtedly play a part. In the UK, students are increasingly defined (and define themselves) as customers in a competitive marketised education environment; the transparency and accountability of the learning ‘products’ they have bought are therefore subject to scrutiny for value and effectiveness, with consequences for the institution should these not meet expectation (Meyer 2014). In comparison with Australasian culture, UK institutions face constant risks of litigation which partly forms a motivating factor in their drive for ‘continuous improvement’ and quality assurance systems.

## **Lesson Observation Policies in England: Why They Are Relevant**

In the UK, schools, tertiary and Higher Education (HE) institutions comply with demands from stakeholders and inspectorates for SARs that, in turn, fulfil public-sector funding requirements. Importantly, arbitrary quantitative statistics derived from these measurements are perceived to have significance and to be comparable and controllable between teachers, institutions and over time (O’Leary 2013b). Burdens from the global economic recession (bringing risks of redundancies) contribute to an audit culture that can be demoralising for educationalists. Furthermore, reductionist surveillance strategies like formally graded observations can decontextualise learning and deprofessionalise staff. Specifically, research from the UK and US suggests the intrinsic evaluative and performative nature of some observation policies is often bureaucratic and punitive in nature, creating unnecessary stress and anxiety for staff (Darling-Hammond 2014; O’Leary 2013a). In short, rather than being developmental, observations can be seen as a tool for pointing out perceived weaknesses in teaching, echoing the deficit model from disabilities studies that I highlighted in Chap. 1 which holds relevance to my own learning and research perspectives.

The extent of these surveillance strategies is made clear by Page (2014), who outlines in her thesis the numerous different types of lesson observation (serving different purposes) that a typical qualified, experienced teacher in the English FE system may be subjected to:

- Interview (e.g. as part of shortlisting processes for a particular role)
- Teacher training (whilst studying towards a teaching qualification and/or CPD)
- Quality assurance (QA) (as part of the institution’s policies)
- Ofsted (regular visits from Government inspectorate)
- Peer (e.g. informal or as part of CPD) (as discussed above)
- Mentor (formal or informal, as part of CPD and/or institutional QA)
- Appraisal (employment contract/promotion application)
- Intervention (e.g. as part of institution’s competence or disciplinary management strategies)

Potentially, all of these observation events could occur at least once annually, sometimes more. There are also potential opportunities for overlap—a QA observation for example (usually administered by a ‘Quality Assurance Department’ within the institution) could also be used as an ‘Appraisal’ or ‘Intervention’ observation, even though the guidelines for each of these observations may differ. If there is some ambiguity about the objective, documentation and outcomes to an observation, then this may increase any anxiety about the performativity within the situation. In a small classroom environment (in contrast to a large lecture hall common in Higher Education), this can have a significant impact on the teacher and the students. Given the potential tense atmosphere in which some of these observations exist, it is unsurprising that evidence of high levels of stress and anxiety among FE staff exists (Cockburn 2005). This is something I explain in detail later in this chapter and is a recurrent theme of this book.

Lesson observations, then, can arguably be seen as symbolic of the embodied tensions between educational policies that force management to be seen as accountable and responsive to economic and political pressures, versus the autonomous, creative and hidden nature of teaching and learning (Palmer 1998). It is paradoxical that addressing students’ holistic and developmental needs are prioritised by policymakers, yet this same consideration may not be extended to teachers. Importantly, although “part of the wallpaper” for most teachers in the UK (Page 2014, p. 47), I have shown how in contrast, lesson observation policies appear less ingrained in some countries’ educational systems (Hendry and Oliver 2012). However, if we accept the inevitable advance of the ‘tentacles of the market’ influencing more explicitly neo-liberal, managerialist policies worldwide, then exploring concepts of performativity within lesson observations for FE staff in England could prove valuable for diverse educational settings.



Research suggests that England's FE sector adds a crucial cultural context to the wider English education system (James and Biesta 2007). The historical and economic reasons for this are fully explained in the sections that follow, but for the purposes of highlighting how affectivity of observations fits within this context, it is necessary to provide here a brief summary of the main issues. This is because, historically, the emphasis within FE has always been to see the sector as a provider of vocational courses such as apprenticeships. The hierarchy, in terms of the perceived value of this education compared to academic qualifications, has a long and complex history and forms part of the embedded use of unhelpful binary definitions that I seek to deconstruct in this book.

## Teaching Qualifications and FE Staff

It could be argued that the industrial decline of the 1970s led to government rhetoric which laid the blame for the shortage of skilled staff with FE institutions. Importantly, an aspect of this controversy centred on the fact that FE staff were often sourced from the industries in which they were teaching so, understandably, held no formal teaching qualifications. However, often individuals held high-level qualification in their vocational area. Inevitably, various government reports highlighted how FE lacked 'responsiveness' to the needs of the economy and that one reason was the poor quality of teaching (Unwin 2003). Subsequently, the 2001 teaching reforms meant FE teachers lost autonomy as more accountability and compliance was seen to be needed. Government recommendations called for all FE staff to obtain teaching qualifications and maintain professional development (Armitage et al. 1999). This call was repeated in subsequent government papers and reports. Indeed, in 2007, this compliance was made an official requirement in the form of Qualified Teaching and Learning Status (QTLS) (Nash 2012). Yet, in a confusing turn typical of the policy changes that FE is subjected to, the requirements for FE staff to obtain teaching qualifications were withdrawn after the Lingfield Report (2012). Because of the changes in the qualification requirements over time, there are a variety of teachers with different kinds of teaching qualifications, which have been accomplished through courses that were/are differently weighted towards theoretical and practical study. Nonetheless, significant progress has been made in achieving high levels of qualified teaching staff over the past thirty-four years, with latest figures indicating approx. 80 % of staff having achieved or enrolled on a teaching qualification (Dept. of Business Innovation & Skills 2012). The current progression route towards qualification in the FE sector usually starts at *Preparing to Teaching in the Lifelong Learning Sector* (PTLL),<sup>1</sup> to the *Certificate of Teaching in the Lifelong Learning Sector* (CTL),<sup>2</sup> concluding with DTLL (Diploma in Teaching in the

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<sup>1</sup>Examining Body City & Guilds, 7303' sits as levels 3 & 4 on the UK Education Framework.

<sup>2</sup>As above: City & Guilds, 7304 Levels 5 & 6.

Lifelong Learning Sector) which leads to full QTLS. This evolution contrasts sharply with teaching in the HE sector, where in the UK contexts data relating to staff teaching qualifications has only recently been openly discussed and remains largely ambiguous and unrecorded by HE institutions (Grove 2015).

It is worth noting at this point that all but one of the fourteen participants from the fieldwork for this book held a teaching qualification, with many already completed or engaging in higher level study at the time of the interviews. Professional identity is an important consideration in an exploration of the emotional impact of lesson observations—especially when dynamics in a perceived power relationship might be skewed by the context of the individuals’ qualifications. This is an issue I explore in the theoretical concepts used within this book’s research, described in Chap. 3.

## The Political Context of Lesson Observations

The Further and Higher Education Act of 1992 severed the link with local education authority controls. The impact of this ‘incorporation’ meant that colleges entered an era of ‘new managerialism’ where commercial factors were seen as one way of addressing the needs of an ‘audit society’ (Randle and Brady 1997). Courses were pruned down to those which could demonstrate profitability; classes grew in size and staff tasked with achieving ‘performance indicators’. In short, although some cost-efficient savings were achieved, arguably quality was sacrificed for quantity (Gleeson et al. 2005). Colleges competed against each other for the same students, which inevitably led to closures and amalgamations. These dramatic changes continued with the additional financial pressures from Public/Private Finance Initiatives (PFIs) and government funding restrictions (University & Colleges 2013). Although benefitting from a reprieve in the UK Government spending review in November 2015, because of its unique position in the sector, FE seems repeatedly to suffer as a potential target for cost-cutting measures whilst paradoxically forced into carrying the weight of responsiveness for the changing economic workforce.

With the economic and government pressures in mind and with additional commercial requirements present, calls for continuous improvement endure. Indeed, pressure from government targets and economic forces impacts directly on the students’ classroom.

These pressures have forced observations in some FEs to appear more ‘objective’ (a problematic term that I discuss fully in Chap. 4) to its Senior Management Teams (SMTs), leading sometimes to prescribed non-negotiable, judgemental ‘pass or fail’ criteria. This is in contrast to a developmental approach which seeks equality in the relationship between observer and observee,<sup>3</sup> argued—as I explained above in the

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<sup>3</sup>The term ‘observee’ is used throughout this book to define the individual who is observed during a lesson observation. Although not included in the Oxford English Dictionary, this term is always used in Ofsted documents, hence its relevance for inclusion here.

previous section of this chapter—to be more frequently a factor of observations that occur in HE (Ewens and Orr 2002). Although peer observations such as those discussed above generally include those that occur between colleagues, in the UK FE context, the value of these sessions is at risk of being dismissed because of the increased focus on numerical scoring used in managerial policies such as SARs.

Furthermore, numerical judgements are often set using external criteria, and again, often seen as non-negotiable. This was partly a result of the Ofsted report “*How Colleges Improve*” (Ofsted 2008b), when the quantitative grading system of 1–4 (grade 1 being the highest attainable, defined as ‘outstanding’ and 4 being the lowest and termed ‘inadequate’) became contradictory when the grade depicting ‘satisfactory’ (a grade ‘3’) was deemed “unsatisfactory” (Ofsted 2008a, b) in a statement ‘satisfactory isn’t good enough’ (Ofsted 2008b, p. 13). This was taken up by the Chief Inspector of Ofsted at that time, Sir Michael Wilshaw, who announced the relabelling of ‘Satisfactory’, to ‘Requires Improvement’ (Ofsted 2012), and is now emphasised in subsequent documents outlining the UK government’s inspection framework (Ofsted 2014). Despite the surreal linguistic confusion of these terminologies, debates around these definitions continue to appear off-limits to the FE staff caught up within them.

The combined pressures of commercial performativity, quality reporting and public-sector funding requirements means that the difficulties in defining and measuring the diverse and complex nature of teaching practice is often ‘pasted over’ (Coffield and Edward 2009). This has been emphasised by more recent burdens from the ongoing economic recession, austerity measures and reduced funding which inevitably bring risk of redundancies. Because of these different pressures, an holistic, qualitative and developmental approach is often dismissed in favour of a simplified ‘tick-box’ method (Secret Teacher (Anon) 2016). There is plethora of research attempting to unravel some of the complexities involved in the subtle nuances involved in ‘good’ teaching and learning, and sharing ‘best practice’ (Coffield 2000; Nias 1996; Strong et al. 2011). However, because the apparently inherent ‘inauthentic’ nature or ‘performativity’ in observations differs from ‘everyday’ teaching practice (Page 2011), observations have been claimed to be ineffective (Boocock 2012). Processes surrounding observations can be bureaucratic and reductionist in nature, viewed by some as divisive and filled with anxiety (O’Leary 2012). But what exactly is meant by the terms ‘inauthentic’ and ‘performativity’ in this context? What are teachers’ perceptions of these terms and how are teachers’ and managers’ emotional experiences of observations related to them? These are the issues which remain unarticulated in the current literature but which I seek to investigate in detail in this book.

As I explained in Chap. 1 and in the beginning of this chapter, educational environments worldwide are under pressure from New Right, neo-liberalist politics which over recent decades have increasingly emphasised the marketisation and commercialisation of institutions through various measurable outcomes (Benade 2012; Peters 2011). Educationalists have highlighted inevitable tensions when the ideology of learning as intrinsically emancipatory collides with an accountability agenda that attempts to generate subjective connections between learning outcomes

and teacher effectiveness (Skourdombis and Gale 2013). I summarised earlier in this chapter how for a variety of reasons, evidence suggests the accountability agenda is less divisive and more informal in some countries like New Zealand and Australia and provided some examples of this. However in the UK, it is deeply embedded within education and has been for some time (Avis 2005). The UK therefore presents a valuable example in the study of performativity within this context because of its relatively extreme marketised environment which has evolved over recent decades.

Lesson observation as part of SAR policies in England's schools and colleges are often annual processes. Undoubtedly, if carried out sensitively, these lesson observations can provide one important strategy towards attempts to measure teacher effectiveness. But often education institutions rely too heavily on these snapshots of teaching. I argue that trying to measure these types of embodied surveillance strategies can be harmful. This is because the prescribed, punitive nature of some lesson observation policies creates teachers who avoid spontaneity and creativity for fear of 'failure' (Page 2014). Indeed, they are reductionist in nature through decontextualising learning and deprofessionalising staff because by definition they aim to assess only the externally observable (Cockburn 2005). Furthermore, the graded outcome from an observation emphasises an underlying binary divide in the language used in education, which draws arbitrary distinctions between 'success' and 'failure'—regardless of the inter-relatedness of the micro- and macro-contexts. Understandably, this approach can heighten emotional tensions for all individuals involved.

Pressure from research and ongoing media publicity of this issue has led Ofsted to announce changes in some of its observation policies (Ofsted 2012; Vaughan 2014). These changes include abandoning the use of formal grades to measure the results of an observation. But avoiding the use of grades in judgements of teaching observed during an inspection does *not necessarily* have a positive impact on managerial processes. Whilst I acknowledge the need for a type of quality control and developmental audit procedure, there also needs to be consideration of individuals' perceptions of the specific type of performativity required of them during an observation and the potential emotional consequences. The following section in this chapter presents the socio-political context of the UK FE sector, contexts which helps illuminate these emotional tensions of staff involved in observation processes which forms the investigation within this book.

## **The Historical and Sociopolitical Context of the UK FE Sector**

The UK FE sector consists of over four-hundred post-compulsory (tertiary) institutions; some three million students of all ages are enrolled on diverse types of courses which, to varying degrees, may be defined as 'academic' or 'vocational' in

nature in a wide range of disciplines. The statistics show an ‘average’ college has 5574 students and employs 642 staff (of whom 307 are teachers) and that it spends £21 m a year (Lifelong Learning UK 2011). But of course few of these institutions can be described as ‘average’: the broad range of students—and the appropriate staff to support them—is unique to this sector. And its diversity is integral to the complexities of managing the service. Indeed, in Chap. 1, I explained how, at the beginning of my return to education, I experienced for myself the difficulties students had to overcome in order to achieve their learning objectives, both in terms of teaching quality and adequate learning materials. Others have highlighted how this educational sector has therefore suffered neglect in terms of investment from government (Ainley and Bailey 1997) prompting Randle and Brady (1997) to famously refer to FE as the ‘Cinderella service’. Twenty years on, it seems this term still has relevance, as becomes clear in this book’s findings.

FE’s humble beginnings began in Edinburgh in 1821, when the first ‘Mechanics’ Institute’ was opened. The increasing industrialisation of the UK had created a need for employees to improve their skills. Here was a place where fishermen could learn new navigation methods and labourers could become shipbuilders (Huddleston and Unwin 1997). During the 1800s, these institutes grew in number and proved particularly popular amongst the male middle-classes, many of whom saw new career opportunities for themselves in managing the increasingly successful cotton mills and shipbuilding industries (Hyland and Merrill 2003). Later, recognising the elements of poor literacy within its membership, the leaders of the 600+ Mechanics Institutes decided that rather than addressing the root cause of this issue, it would instead separate its programmes into either skills-based, vocational courses or academic scientific courses for the more highly educated. This arguably formed the beginning of the division between the vocational and scientific educational provision that persists today. (Years later, this division was to be further embedded into society and psyche, when the 1944 Butler Education Act artificially separated the school provision into technical and academic.)

By the mid-1960s, there was an increasing ‘binary divide’ (Merrill and Hyland 2003) between academic and apprentice-style educational provision and although the latter were expanded, they were arguably used by employers as a cheap source of labour dominated by the construction and engineering industries (Armitage et al. 1999). Youth unemployment rose to over two million by 1980 (ONS 2015). The FE sector inevitably therefore continued to expand; many were enrolled on Vocational Employment Training (VET) schemes, which proved to be a useful tool for government’s Manpower Services Commission which was set up to supervise national employment training schemes under the Employment and Training Act (1974) (Armitage et al. 1999). But importantly, FE also gained students from the adult population: changing social attitudes and economic pressures persuaded many who wanted a ‘second chance’ to revisit educational opportunities (Randle and Brady 1997). Indeed, rather than achieving the government target of a mainly young student population, by the end of 1980, the majority of FE students were mature part-timers (Huddleston and Unwin 1997). This is important because many of the staff within FE have *themselves* benefited from FE provision—as mature students

and/or within vocational or initial teachers' training (ITT) (Bathmaker and Harnett 2010; Bathmaker and Avis 2005; Lucas 1996). This is a crucial aspect to consider when exploring the professional identity of FE staff which as I explain later in this book is intrinsically linked to concepts of performativity and accountability.

## **Education's 'Responsiveness' to Political and Economic Needs**

Political educational perspectives fundamentally shifted during the 1970s world recession (Unwin 2003). In 1973, Britain joined the European Economic Community (EEC) and consequently imports from countries outside the EEC significantly reduced (Hyland and Merrill 2003). The UK planned and developed substantial economic import and export infrastructures during this decade. However, spiralling costs arising from the 1970s Oil Crisis led to a sharp industrial decline and a shortage of skilled workers (Edwards 1997). Discourses from worldwide governments (notably in the UK from Callaghan's Ruskin College speech 1976) and from organisations such as the Confederation of British Industry (CBI) blamed this perceived lack of responsiveness on the state-run education systems (Shilling 1989).

Education and training (of which FE was viewed as an integral factor) had undergone a global change in being identified as 'the key' to a country's economic success (Brown and Lauder 1996). However, despite the rhetoric that was repeated over the next forty years, FE was not to gain favour as the government's body of choice to deliver these requirements—and arguably, remains out of favour today (James and Biesta 2007). In a follow-up to the Russell Report (1973), the Haycocks Report (1978) also began to lay the blame for the shortcomings of Britain's (un)skilled workforce at the gates of FE. When numbers of semi-skilled manufacturing jobs in the UK greatly reduced, newly emerging service-sector industries were simply not geared up to provide training, which prior to this time was provided within the manual workforce in apprentice-type schemes (Edwards 1997). Research in the 1980s suggested that, in the UK, there were five times more unskilled employees than skilled (Hampson 1988). Because FE staff frequently migrate from their (commercial) vocations, rather than formal teaching careers (Avis 2002), it was perhaps inevitable FE staff (many of whom at that time had no formal teaching qualifications) were specifically blamed for these perceived failures (Robson 1998).

This was the backdrop to what Randle and Brady (1997) described as an era of 'new managerialism' which spread to all parts of the public sector in England during the early 1980s. It took the form of policies taken from the commercial sector which were judged to be successful in terms of efficiency and profitability and therefore fully transferable (Ball 2003). Seen within a global context, this was a response to how education has needed to adapt to the fundamental changes in modern society lifestyles (Bauman 2000; Featherstone 1991; Leadbeater 2000;

Murphy 2000). Some cultures are still currently adjusting to these changes. Advancements in technology mean staff with skills in emotional labour are sought, rather than semi-skilled labourers (Hochschild 1983). (This is an issue I return to in Chap. 3.) However, because of the position of FE within the education system, it was perceived that it should 'respond' to these changes—despite the sensitive and ambiguous nature of these skills and the teaching and learning that surrounds them (Colley 2012).

Observations are integral to this issue because within this context, they arguably have come to form the epitome of the performativity of these managerialist strategies (Ball and Youdell 2008; O'Leary 2012; Whitehead 2005). In particular, they embody pressures within strategies that attempt to oversee, control and measure what is perceived as 'best practice' in the classroom (Ewens and Orr 2002). It is this reduced sense of trust and autonomy that impacts upon teachers' perception of their professional identity. This introduces tensions between the normalised acceptance of a professional being held accountable and the difficulties in trying to quantify what this accountability means in practice (Page 2014). In short, quality assurance policies like observations form an important aspect of the complexities within and between the roles, rights and responsibilities of education staff (McQueen 2014).

## **Changes and Incorporation: Socio-Economic and Historical Contexts**

With the above historical development in mind, increasingly during the 1980s/1990s, education was beginning to be seen as a product—not simply as a social good (Hyland and Merrill 2003). It was as a result of this widening marketisation, that the Further and Higher Education Act (1992) brought a new independence from local authority control for FE colleges which would become completely independent from local authority control with a board of governors responsible for its own employees. The Further Education Funding Council (FEFC) was formed which allocated and controlled funds and insisted on uniformity across all management budgets. However, allocation of this funding was not determined by quality assurance measurements like observations. Arguably this was because there was no national strategy for Initial Teacher Training (ITT) or CPD (of which observations are intrinsically a part), and this varied widely between (and sometimes within) colleges (Lucas 1996). FE faced pressure from the outside world: not only did it shoulder the blame for previously not meeting the needs of industry, but now it was tasked with ambitious targets for increasing enrolments, becoming more 'responsive' to society and in turn becoming accountable in being measurably 'better value' for the taxpayer (Randle and Brady 1997).

In some aspects, FE did deliver its targets: for instance, over the four years from 1993 to 1997, student numbers in FE increased by 33 % and some inequalities in gender and age provision were addressed. However, funding per student *decreased*

by 21 % (Ball 2003) and pressures on staffing and resources meant that these dynamics may, in part, have accounted for the perceived ‘slipping standards’ reported by later government inspectors (Ofsted 2004a). However, the criticisms of the actual *teaching practices* within FE from Ofsted (and other bodies) were arguably due to other complexities, for instance, in whose interests were potential ‘improvements’ in teaching and learning (James and Wahlberg 2007)? And how were these *definitions* and standards changed over time (O’Leary 2013b)?

There were further pressures for the FE sector when ‘incorporation’ produced pressures to reduce costs. Many managers employed more part-time and sessional (hourly paid) and/or fractional staff which resulted in significant changes to college culture (Biesta 2011; Gleeson et al. 2005). Arguably, because of the pressures of marketisation and the need for more flexibility in the FE workforce (in responding to the ever-changing needs of policy, funding and student enrolments) by 1997, 52 % of FE staff were part-time (Hyland and Merrill 2003). Communication between FE staff became increasingly problematic when the practicalities of (paid) co-ordinated attendance at departmental meetings and training sessions grew increasingly difficult (Ball 2003). This was exacerbated when students’ timetables had to be manipulated in order to conform to the FEFC’s new criteria of ‘core’ funding within the three specifically predetermined dates or ‘stages’ of learning: ‘entry’, ‘on-programme’ and ‘achievement’.

Avis (1996) reported that where courses had previously been run efficiently through strong team support, this began to falter because part-time/sessional staff would often not be able to attend and/or not be illegible for paid attendance at meetings (Robson 2005). Furthermore, prior to 2001, FE teachers were not required to hold a formal teaching qualification, and numbers of unqualified teachers in FE increased, reportedly reaching 50 % in some colleges (Ofsted 2004a, b). As each institution could now control its own pay grades and structures, further complexities arose as staff migrated to colleges offering the best salaries, terms and conditions. Observations became in some ways the driving force of these changes, as I explain below.

## New Labour’s ‘Social Inclusion’ Agenda and FE

With the landslide victory of New Labour in the 1997 UK General Election, ‘education’ and ‘social inclusion’ become new Blairist buzzwords and thereby integral to FE’s new delivery target. However, for some colleges, a decade of ‘new managerialism’ had created new problems. Significant growth in some FE colleges meant quality was sacrificed for quantity; classes became much bigger, courses had less ‘contact’ hours,<sup>4</sup> and the more labour-intensive pathways were swapped for

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<sup>4</sup>Contact hours are strictly enforced measurement of minimum time limits for teaching or ‘delivery’ of an element of a course specified by the exam boards.



those that were more wide-ranging or combined two courses into one. Research at the time suggested that FE managers (often drafted in from commerce) became seemingly preoccupied with the commercial aspects of delivery as colleges were forced to compete against each other and against private training providers for the same students (Ball 2003; Gleeson et al. 2005). Inevitable tensions arose between managers who had commercial sector backgrounds (often informed via freelance consultants) and teaching staff with vocational experience (Randle and Brady 1997).

Throughout the 1990s, educational management centred on striving for efficiency, through the increased use of perceived scientific, quantitative approaches to measuring and controlling workforce output through 'Key Performance Indicators' (KPIs). Political policies evolved from these contexts that aimed to measure 'successful learning' via performance indicators *including* observations which aimed to assess teaching competences. As I will explain, the *performativity* is an important concept here, as it highlights the complexities inherent in notions of pedagogy where the subtleties and complexities inherent in individual learning are arguably impossible to accurately 'measure' (Gleeson and James 2007; Whitehead 2005). As a result of the changes described above, not least the pressures of new managerial procedures like observation policies, difficulties emerged for staff on micro- and macro-levels, in the classroom and outside. In particular, tensions were emphasised between individuals' perceptions of 'competency' and 'professionalism' as adhering to managerial constraints—compared to a view of professionalism as agents in control of their role (Gleeson et al. 2005). Furthermore, research has suggested that for some FE staff, their identities are closely wrapped up with their (previous) vocational identities—rather than primarily as a 'teacher' (Bathmaker 2005; Clow 2001; Lucas 1996). With this in mind, it is interesting to note that some lecturers feel obligated to spend more time on perceived bureaucratic paperwork, compared to the perceived 'real value' of their roles: time spent supporting the learning of their students (Colley et al. 2007; James and Biesta 2007). Reflecting on my own experiences, and confirmed by Whitehead (2005), lecturers' duties over recent years include creating entirely new courses, analysis of their financial sustainability against budgets, marketing to students (and for commercial sponsorship where possible), interviewing potential students (and their parents), running 'Taster-' or 'Open Days' and more. In particular, validation of any 'new' courses by examining authorities means considerable time is spent writing reports and completing forms by already over-stretched staff and with limited resources (James and Biesta 2007). The somewhat inevitable result of these changes led to significantly less time in the classroom. However, rather than sacrificing the personal reward implicit in teaching and learning, research has suggested that some FE teachers take these aspects of their role 'underground' (James and Diment 2003), for example through investing private time and money into interactions with their students. This issue is further explored in the following chapters, but first, I continue with the historical overview which provides insights into the contextual evolution of lesson observations in FE.

In 2001, New Labour set up a new quango: 'The Learning and Skills Council' (LSC) which replaced the FEFC and the TECs and would oversee the planned

rebuilding projects and the ‘train to gain’ qualifications. The student profile in FE had continued to change: in 2003, students over 24 years of age and studying part-time had grown to make up over 73 % of enrolments (Merrill and Hyland 2003). FE colleges were also now focused on strategic partnerships with HE institutions (Boocock 2012). These changes and partnerships had many positive benefits to students and institutions as a whole, such as a more consistent level of provision in terms of teaching time and assessments (Robson 2005). However, they perhaps inevitably provided new internal difficulties. The division between HE and FE staff was often more than simply the physical location of the teaching rooms or campus. In my experience, supported by research, the perceived hierarchy of HE teaching compared to FE lecturer status sometimes contributes towards complex emotions in the staffroom, for instance in the form of bitterness over salary or employment contract terms and conditions (Gray 2010). Teaching staff were at that time required to hold a formal qualification endorsed by the relevant authority (Ofsted 2004b). It was hoped that professional qualifications would help to increase the perceived ‘low status’ of the profession (Robson 1998), something that also had implications for self-identity and self-esteem of FE staff. However, the formal teaching qualifications were heavily criticised, perhaps because the professional standards were reduced to vocational, competency-based units—the pass criteria of which were similar in style to an National Vocational Qualification (NVQ) (Avis 2002). It was seen that a more reflective, value-based, professional teaching qualification was required for improving the professional practice of FE teachers (Universities Council for the Education of Teachers (UCET) 2004), one that was more sensitive to the diversity of FE teachers’ needs (James and Biesta 2007). The parallels between the perceived weaknesses of the assessment of these professional standards are revealing when compared to shortcomings of the tick-box evaluations which have become so controversial in observations. But how do perceptions of tick-box policies affect FE staff and why is this problematic for them?

## **Assessment and Performativity in England’s Further Education**

Prior to the government policy changes in FE (summarised above) that led to their incorporation in 1992, most observations were conducted as part of ITT or as part of a new teacher’s probationary period (Cockburn 2005). With the introduction of a more managerial approach, driven by definitions and criteria set by Ofsted, the focus was now on performativity. However, performativity is arguably not designed to celebrate, or indeed value, the unique qualities, particular enthusiasms and creativity of the educational professional (Palmer 1998). Instead, it attempts to evaluate that which can be measured, weighed and ‘objectively’ assessed. Teachers thereby find themselves increasingly concerned with ensuring paper trails are accurate, rather than delivering learning outcomes (Whitehead 2005, p. 17).

Importantly, research suggests these pressures conflict with views of many FE staff who valued teaching because of its autonomy and spontaneity, which some propose may be founded on the 'cultural norms' of professional isolation and scarce resources (Cockburn 2005). This is reflected in teachers' perceptions of how their work is established on resourceful empathy and intuitive artistry (Colley 2006; Nias 1996). Indeed, some FE staff prefer to define themselves as 'teachers' rather than 'lecturers'; job titles may represent different aspects of complex pedagogical and professional identities, as I explain in the analysis of the participants' interviews upon which this book is based.

In relation to observations, it is important to note that Cockburn (2005) and others (e.g. Boocock 2012; James and Biesta 2007) criticise a tick-box approach to assessment and predetermined views of 'best' teaching practices. Similarly, research by Copland (2010) also suggests these issues are the cause of tensions within observations in ITT contexts. More specifically, she argues (in line with others such as Jones (1993)) that open dialogue through joint preparation and participation in prebriefings and feedback meetings provide enhanced opportunities for sharing the contexts of the classroom and thereby developing teaching practice (Burnell 2015). Hence, lesson observations which omit this important element are argued to be inadequate in addressing the complexities inherent in FE cultures. Observations have therefore understandably become closely linked to issues related to 'deprofessionalisation' which, as I described, became an underlying theme of FE research during the mid- to late-1990s onwards. The characteristics of this 'new managerialist' approach—symbolised in policies such as observations—were seen to be attempting to reduce teaching professionals to 'performative automatons' (Ball 2003).

The implementation of measures designed to improve teaching and learning provision in FE may appear to be a valid response to the needs of this growing sector. However, tensions grew between (past) staff practices, the value placed on learning and institutional pressures to be seen as 'responsive':

Performativity, through its chain of targets and accountability, operates within a 'blame culture' where accountability becomes a means by which the institution can call to account its members. In many respects performativity is reminiscent of Fordist work relations in as much as the worker is tightly surveilled, with attempts to render transparent the details of practice. (Avis 2005, p. 212)

Unquestionably, because of this accountability agenda, the dynamics of the FE classroom fundamentally changed: rather than being developmental, the observation carried an implicit judgement about competence in the form of a formally graded assessment (O'Leary 2011). It has been claimed that there is a paradoxical nature to concepts of professionalism in FE (Gleeson and James 2007). The personal values, autonomy and artistry involved in the skills of FE teaching juxtapose against pressures for more 'objective' quantifiable measures of what is perceived as 'better' or 'best practice' (Cockburn 2005). Because concepts of competence and integrity are intrinsically linked, the association between surveillance of teaching practice and being seen as a novice (by the self and/or other) 'unprofessional' or

even ‘incompetent’, understandably leads to feelings of anxiety (Cockburn 2005; Page 2011). These concepts are discussed in more detail in the following chapters. However, importantly in the context of the historical development of observations, these risks exist not only on an individual level, but on an *institutional* level. ‘Failure’ may lead to a perception of humiliation as a result of incompetence, rigorous reassessment, reduced funding and eventually closure.

In 2007, arguably in response to the Foster (2005) report’s recommendations, the Adult Learning Inspectorate which oversaw teaching quality in FE and Ofsted (the body responsible for school inspections) were merged. SMTs in FE felt compelled to respond to the requirements of Ofsted (Robson 2005). In part, this meant adhering to the Ofsted criteria of graded observations, which in turn contributed to the elements of funding determined via quality standards. However, in relation to the practicalities of observations, neither the Institute for Learning (IfL) nor the Association of Colleges (AoC) offered any specific recommendations for colleges’ observation procedures (Page 2014). Many institution’s policies have therefore evolved and developed over time. However, rather than a ground-up approach (as arguably can be seen from the Australasian examples discussed earlier in this chapter), these were top-down, forced responses from management to demands from Ofsted.

The objective of lesson observations in this context is therefore perceived as having an audit function allowing analysis towards identifying observable ‘strengths and weaknesses’ in teaching practices, as perceived by the observer. It is thereby often used as a quality assurance *and* quality improvement management system rather than primarily as a staff development tool (Cockburn 2005). Ofsted’s inspections have carried an implicit refrain of ‘continuous improvement’ (Ofsted 2008a) over the backdrop of the historical context I have outlined above. Ofsted’s graded approach and terminologies used has debatably evolved to *defining* standards rather than inspecting them (O’Leary 2011). As Boocock (2012) explains, the implications for Ofsted’s criteria being used in observations had a knock-on effect for measurements of activities within the classroom:

To achieve a higher grade in the observation process lecturers were required to deliver lessons in which behavioural (i.e. ‘measurable’) learning objectives were linked to student-centred learning opportunities [...] which were differentiated [via] learning styles (e.g. the Kolb learning inventory), learning difficulties and levels of literacy and numeracy. Crucially, such differentiation was expected to lead to the achievement of the learning objectives as evidenced within planned learning checks, such as quizzes ... (Boocock 2012 p. 5).

Because of the power of bodies such as Ofsted and internationally, PISA, in terms of funding and league tables, SMTs perhaps understandably can take a literal translation of the terms and criteria for quality and practice, rather than create bespoke self-assessment strategies sensitive to the unique cultural contexts of the individual institutions and/or their staff. Aspects such as reflecting upon any feedback is undervalued and underexplored, when this is an intrinsic aspect of lesson observation.

Research suggests that to remain effective, feedback to any evaluative assessment (whether formative or summative) must be provided as soon as possible after the event (Hammersley-Fletcher and Orsmond 2005). However, feedback in some observations is delayed by days or weeks and sometimes retained altogether for the exclusive use of management (Burnell 2015; Cockburn 2005). Formative feedback is often ignored or afforded less significance in the presence of a formal graded outcome (Ecclestone 2005; Race et al. 2005), because assessment by definition is often closely linked to its summative outcomes—rather than any formative value (Ecclestone 2005). This seems ironic when it is Ofsted's recommendations which have arguably driven the need for quantitative outcomes, as opposed to a more formative, developmental approach (Robson 2005).

Whilst acknowledging the integral influence of Ofsted on the development and perception of observations in FE, the complexities of this debate lies outside the scope of this book which focuses on the emotions involved in non-Ofsted observations. Observers in these situations could be peers, but are perhaps more likely to be line managers, advanced practitioners (APs) or SMT members of the college. So rather than strangers, observers/observees are likely to be from their own institution; this has consequences for the power relationships and the intrinsic emotions involved.

## Stress and Anxiety of Graded Observations

Because of their own experiences, observers may be aware of the potential symbolic power of the numerical grade and its ability to conflict with the teachers' perception of their professional identity (O'Leary 2012). Often an intrinsic part of the training required to be undertaken by observers involves consideration of these sensitivities, particularly when providing feedback—which should contribute to individuals' reflections on the session. Nevertheless, no matter how sensitively handled, feedback can sometimes (perhaps understandably) trigger defence mechanisms in (both) individuals which may inhibit an open professional dialogue about the content of the lesson (Cockburn 2005). This aspect is central to my investigation into the lived emotional experiences of individuals involved with observations in FE. Closely linked to this psychosocial perspective are the difficulties inherent in the subjective judgement within a lesson observation. These are noted by Cockburn (2005) as being because “the presence of an observer is thought to change the situation and make the behaviour of the observed contrived and artificial” (p. 377). Furthermore, as O'Leary (2011) notes:

By attaching a grade to the subjective judgement of the observer, people are seduced into believing that such judgements have greater objectivity and authority than they can, in reality, claim to have (O'Leary 2011, p. 8).

This may be because as Gibbs and Simpson (2005) point out, important aspects of learning are not related to the teacher's performance per se, but more accurately reflected in these four *student*-centred factors:

1. Motivation to learn
2. Interaction with peers
3. Reflective activity
4. Interdisciplinary method.

These complex pressures from the many different areas of theoretical, historical, economic and managerial factors have meant quality assurance measurements like observations must be seen to be ever more ‘objective’. However, it appears that the elusive ‘objectivity’ is rarely problematised as a definition on a practical level within UK Ofsted reports (Ofsted 2014) or FE colleges’ own documentation (Page 2014). Perhaps partly as result of the increased commercialisation and marketisation of FE discussed above, together with SMTs recruited from commercial sectors, it appears that often ‘objectivity’ in this context is perceived to be accomplished through being detached or ‘dispassionate’. As Lupton (1998) points out, often this is because emotions are viewed by some as the antithesis to logic. This runs contrary to the large literature which asserts the spiritual and psychosocial aspects of teaching and learning (e.g. Palmer 1998).

Putting aside, for a moment, the problematisation of the term ‘objective’ within the UK context, SMTs seeking to present observations outcomes as more ‘objective’ ensure (for example) that the observer is unknown to the teacher prior to the observation. Similarly, that the observer has no experience in teaching the observed subject area (Cockburn 2005). This has parallels across educational sectors, where Hatzipanagos and Lygo-Baker (2006) found that observations in HE were often conducted by individuals outside the lecturer’s area of expertise—indeed, this is something that some voluntary peer review observation schemes also encourage (Hendry and Oliver 2012). Furthermore, sometimes, the observer is not a qualified teacher (but will instead have undergone some type of in-house ‘observer training’). The observer therefore may also lack the *context* of the teacher, the learners or the lesson (O’Leary 2013a, b, c). In this way, some SMTs see the observer as remaining ‘detached’ from the teaching by observing a lesson unannounced (e.g. within a set time frame of one week’s timetabled lessons). Although for some teachers this perceived anonymity may be helpful in what is perceived to be a judgemental situation, the danger of this detachment maybe to dehumanise (Linstead 1994) as this approach inevitably leads to arbitrary judgements based only on the externally observable (Bourdieu 1984). This can arguably lead to assumptions on behalf of the observer, within the context of an assessment of competence (Avis 1996). In turn, this can be unsettling for the staff involved and lead to negative emotions that can impact well-being.

Levels of stress and anxiety in teaching professions are the highest of any comparable job, with FE teachers *in particular* being subjected to longer teaching hours, fewer holidays, lower salaries and poorer working conditions than any public sector teaching position in the UK (James and Gleeson 2007; Robson 2005; University and Colleges Union 2011). Perhaps understandably, staff turnover is high, with many teachers leaving after the first year (Boocock 2012; Robson 2005). The perceived unending bureaucracy of the neo-liberal policies I summarised in Chap. 1, including

department meetings, observations, Ofsted agendas of SMTs, all add to the ongoing stressors and potential ‘burnout’ (Stoeber and Rennert 2008). Research suggests that one of the main causes of this tension is because lecturers often feel they do not have enough space to exercise pedagogic judgement (Colley 2012) and increasing pressures from marketisation means some staff are subjected to workplace bullying (Lewis 2004). No wonder then, that with observations reportedly adding further to this anxiety, they have been described as a common ‘flashpoint’ in many colleges (O’Leary 2011, 2013c). This is arguably because, rather than being developmental, observations represent for some a symbolic representation of a deficit model; an inherent risk of judgement as an ‘incompetent teacher’—and the serious consequences this label may carry. In the largest national survey of lesson observations undertaken by O’Leary (2013c), thousands of FE staff participated in a mixed-methods study. Quantitative findings confirmed that 85 % of the nearly 4000 participants from a wide variety of FE institutions did not agree that lesson observations were an effective way to assess a teachers’ competence. Indeed, the qualitative data illustrate a ‘groundswell’ of strong feelings about the

‘counterproductive effects’ of observation, highlighting the predominant perception among many of the project’s participants that the use of observation in the sector was deemed problematic rather than productive (p. 55)

Significantly, taken into the context of the wider accountability agenda within education systems that I described at the beginning of this chapter, the pressure for increased accountability arguably drives the quantitative evidence of graded observations that is perceived (by management and others) Ofsted require. Indeed, the stress and anxiety reported from FE staff goes alongside the ongoing changes of deprofessionalisation of FE described above. This has contributed to the perception of an audit culture that for many FE staff has evolved into a discouraging ‘tick-box exercise’ (O’Leary 2011). As Cockburn (2005) notes that, partly as a result of ‘The Hawthorne Effect’—which emphasises the contrived nature of a performance where an individual is being ‘tested’—there is an inherent power relationship within an observation. In the light of this, O’Leary (2012) uses a Foucauldian lens to illuminate the apparent ever-present ‘pan optical’, managerialist approach to observations—arguing it is one of domination, not enablement. Summarising the tensions between the performativity of teaching and learning and the complex nature of the emotional labour involved, Ball (2003) comments: “...beliefs are no longer important—it is *output* that counts. Beliefs are part of an older, increasingly displaced discourse” (Ball 2003, p. 233).

Unsurprisingly, there has been ongoing defiance against formally graded internal lesson observations. After an increase in imposed punitive and draconian changes, University and Colleges Union (UCU) reported how lesson observation policies have become the subject of the largest number of local industrial disputes compared to any other single issue in FE (UCU 2016). With their Union’s support, staff at numerous colleges including Tech City College, Leicester’s Gateway College and Hull College (to name three examples reported in the media) undertook strike action because of concerns that management had an unfair and draconian approach

to lesson observations (Ali 2016; Dryden 2014; Morris 2015). Lesson observations have also been the focus of the majority of conference motions in the sector over recent years. Staff campaigns attempting to encourage developmental models of lesson observation are gaining momentum, especially after the publication of the report by O’Leary (2013c). However, despite some recent positive changes, some institutions’ management insist on retaining or even tightening punitive graded lesson observation policies, so unsurprisingly lesson observations remain a highly contentious issue in FE (UCU 2016).

The conflict between the needs of management in adhering to the pressures from economic and political quarters, versus the creative ‘hidden’ nature of teaching and learning in FE is integral to the performativity of observations. However these debates leave little space for a deeper understanding of the *how and why* of individuals’ emotional lived experiences of observations. The ongoing economic crisis is placing ever more pressures on FE staff; inevitably sometimes this challenges their commitment to students and prevents reflexivity or workplace learning. Of relevance here is that research has suggested emotional suffering is likely to emerge within a judgemental atmosphere which in turn erodes team-working, and therefore has a negative impact on professional and personal identities (Colley 2012). There is a social justice issue here that needs to be addressed. Accountability needs to be rebalanced, groups like Ofsted and SMTs need to adhere to policies of transparency and engage in professional dialogues which encourage open debate of assessment to teaching and learning.

## Conclusions

In this chapter, I have explored the rationale and context of lesson observation policies within the global educational environment. By briefly examining the policies and strategies of classroom observation from some examples of the international literature such as Australia and New Zealand, the UK FE sector is usefully positioned on the extreme end of a continuum in an increasingly politicised, marketised audit culture. I have illustrated how the evolution of neo-liberal, New Right policies has forced institutions to be seen to be responsive to the needs of the economy by providing accountability policies that are fully transparent and, more importantly, quantitatively measurable. These responses have infected micro-aspects of classrooms in England and have contributed to a workplace that unnecessarily pressurises staff and potentially prevents a positive learning and teaching environment because of the stress and anxiety it causes. This book contributes to research in this area in illustrating how these policies are ineffective in measuring teaching quality and that this unfair, judgemental approach through managerialist strategies is deprofessionalising staff and is having a significant detrimental impact on the sector as a whole.

The scene is set for the next two chapters in which I examine the theoretical concepts that give meaning to the micro-level aspects of these pressurised,



managerialist policies. This theoretical framework will provide insight into the lived experiences of the staff involved in lesson observation policies that forms the basis of this book.

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