

Developing subject knowledge and
creativity in business and
economics teachers

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Abstract

This thesis is rooted in my professional work as a business and economics teacher-educator. It aims to explore what constitutes good teaching in business and economics education. Two research themes run through the thesis: the importance of creativity in teaching-and-learning and the importance of teachers' subject knowledge. My central argument is that strong subject knowledge combined with a creative approach is the key requisite to good business and economics teaching.

There are three substantive theory chapters. Chapter 3 critically examines the notion of creativity and its relevance to secondary school teaching. While there is a creative arts agenda, I argue that creativity is under-conceptualised in the business education classroom. Chapter 4 examines the importance of subject knowledge and its relationship to pedagogical knowledge. Issues of teachers' tacit knowledge and teachers' expertise in transforming content knowledge into a form that is accessible to pupils are explored. Chapter 5 takes a critical look at the business and economics curriculum and offers an explanation of why the current curriculum provision is as it is; historical perspectives and political pressures are examined as part of the explanation.

The thesis includes two substantial research chapters. Chapter 6 examines the teaching of Taxation and reports on a funded research project undertaken on behalf of the Inland Revenue, HM Customs & Excise and HM Treasury. The research methods included an extensive quantitative survey which yielded 200 responses and qualitative approaches which included seven focus group sessions. A tension between easy-to-use resources and the need to develop students' critical thinking is uncovered. Chapter 7 looks at the use of business and economics fieldwork in Krakow, Poland as part of a PGCE course in business and economics education. There is an examination of how beginning teachers' subject knowledge may be developed and how creative approaches can be encouraged.

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Declaration

I hereby declare that, except where explicit attribution is made, the work presented in this thesis is entirely my own.

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Preface

Professional context

I look back at my own school education with a mixture of emotions. I remember being an anxious pupil at primary school where I found learning exigent and my teachers apparently unsympathetic to my difficulties. In 1973 I failed my 11-plus examination and I remember overhearing a conversation between my parents and a family friend who told them not to worry because I could still become a 'plumber or something'. I do recall feeling a failure at the time.

I survived my secondary schooldays where I went to a very tough school. Yet I look back at these five years with affection and I am grateful to the many enthusiastic and dedicated teachers who nurtured my personal and academic development. I was one of a handful of pupils who passed their O-levels and consequently I was offered a place in the sixth-form of the grammar school to study A-levels. These were another two difficult years for me; it seemed to me that the teachers only appeared to be interested in helping the brightest of pupils who were of Oxbridge calibre, and coming from a Secondary Modern school I was perceived not to be one of those. I look back in dismay at the poor education that I received during these two years.

I graduated from university in 1983 with an economics degree, but at that time I was unsure what career to pursue. I worked for two years in industry in the textile and confectionary sectors, but I lacked a sense of professional fulfilment. Looking for a change in direction, I embarked on a PGCE in economics and social studies in 1985. I recall my initial excitement of studying in an environment that had an ethos of mutual respect and collaboration and the infectious enthusiasm of my two tutors. I think for the first time in my life I became excited by the concept of learning. Just a few

weeks into the course, I spent a week's observation in a secondary school and by coincidence it was my old secondary school and my former history teacher persuaded me to be brave and to teach a lesson. It was to a Year nine group and I remember spending some seven hours planning the lesson and preparing resources. The time was well-spent for I recall the 'buzz' of teaching the lesson and the satisfaction of receiving applause from the class at the end. It was clear to me then that I had made the right career change.

My schoolteacher career lasted eleven years: five in a south London comprehensive school and a further six in a west London mixed-ability secondary school where I ran the business and economics department. It was in my eleventh year of teaching that I was seconded to the Institute of Education on a 50% basis in the capacity of a PGCE tutor while continuing my teaching and management responsibilities at school. I enjoyed the new role so much that in the following year I resigned my teaching position to become a dedicated teacher educator, a role that I have now pursued for nine years. In the early days of my Institute career, I very much saw myself as a teacher who could share his experience with his beginning teachers. However, I now understand that the role of a teacher educator is a much deeper one and some of the facets of the teacher-educator role are explored later in this thesis.

I now have a number of different roles at the Institute of Education, but my most defining one is that of Subject Leader of the Business and Economics Education PGCE. In this capacity, I am responsible for developing a curriculum appropriate for the needs of business and economics education beginning teachers. It has thus made professional sense for me to pursue an EdD to help me broaden and deepen my knowledge of teaching and learning and in pursuing the EdD I feel privileged to have been able to locate my research in my professional work.

The EdD: taught course, the institution-focused study and the thesis

The first phase of the EdD involved writing six 5000-word essays on various aspects of research and professional practice. In 'Methods of Enquiry 1' I examined values and ethics in business education. I criticised the positivistic epistemology of economics, arguing that the paradigm was outdated and I argued the need for a hermeneutic approach. I suggested that the decline of economics in schools and in higher education might be partly due to economists¹ clinging onto an outdated and flawed paradigm. In contrast, the rise of business studies, which employs a more pragmatic mixed-methodology, has enjoyed increased popularity².

In 'Methods of Enquiry 2', I reported on a small research project that I had conducted in a secondary school in west London. My research investigated the capability of A-level business studies students to articulate business ethics issues. The research instrument I used was an essay which the students sat under examination conditions and I analysed their answers using an axial coding technique. I used a control group of General Studies students to provide a basis of comparison. Given the small sample no generalisable conclusions were possible, but my research did point to shortcomings in the conceptualisation of ethical problems by those sixth form students involved in the research.

In 'Foundations of Professionalism' I looked at how government-led changes in initial teacher education had an effect on the professionalism of new teachers. On the one hand, a more prescriptive curriculum, Ofsted inspection and the need to meet published competences helped bring about a rise in

¹ I refer to the educational economic community, namely teachers, lecturers and academics

² There has been a significant rise in the number of students taking GCSEs, ASs, A2s and applied qualifications such as AVCE. A quantification of examination entries is offered in chapter 5.

standards by benchmarking minimum requirements and clarifying minimum standards. However, on the other hand, there was a strong deprofessionalising element to these reforms. I argued that many teachers were reduced to 'delivering a prescribed curriculum' in place of developing as reflective practitioners or indeed scholars.

In 'Curriculum Policy and Practice', I examined the Business and Economics Education PGCE in terms of a curriculum. I explored the idea that a curriculum is much more than a programme of study and I explored the tensions between advocates of outcomes-based models and process models of curriculum development. This essay included a critical look at the TTA/DfES Competences (later to be renamed Standards). I was, nevertheless, optimistic that the PGCE offered by the Institute of Education did produce rounded and balanced teachers despite the logistical constraints imposed by the TTA.

In 'Advanced Research Methods', I examined issues of ontology, epistemology and methodology in relation to educational research. I argued for a position of 'transcendental realism'³, one that is critical of both positivist and hermeneutic approaches. I aver that taking an eclectic approach to research, using research instruments that are 'fit for purpose', is pragmatic and legitimate.

In the 'Specialist Routes' essay, I attempted to examine the preconceptions that beginning teachers of Business and Economics Education bring with them about the use of non-didactic teaching methods and how these may change during the course. The research question was ambitious, too ambitious, for a 5000-word assignment. The research instrument, a questionnaire, proved to be inadequate for its purpose and furthermore, in retrospect, I can see fundamental flaws in the questionnaire design. Nevertheless, the process of doing this essay proved valuable for I learned a

great deal about research and the limitations of positivistic research instruments in the social sciences.

The second phase of the EdD involved writing a 15,000 word Institution Focused Study. My IFS looked at the changing role of Higher Education in initial teacher education with the Institute of Education being a case in point. In the IFS, I took forward the concept of curriculum examined in one of my previous essays and I attempted to conceptualise the Institute's PGCE courses in such terms. I examined the relationships between curriculum, culture and pedagogy in the light of increased pressure from central government in the form of prescribed programmes, TTA/DfES Standards for initial teacher education and the Ofsted regime that sought to check the compliance of ITE providers. I used a mixture of research methods in this assignment. I used secondary research to identify transatlantic trends in ITE and a mixture of quantitative and qualitative research instruments to examine the Institute of Education experience from both teaching and learning perspectives.

The thesis that follows this preface represents the final phase of my doctoral journey. The regulations stipulate that it should be between 25,000 and 40,000 words in length and I have used the maximum amount allowed to be able to adequately develop my ideas and arguments. The thesis is rooted in my professional practice and in it I have been able to develop many of the themes explored in phases 1 and 2.

In Chapter 3, I explore the concept of creativity for I believe this concept to be crucial with regards to good teaching. Teachers need to be creative in their planning if they are to construct interesting lessons and, indeed, if they want to develop the creative talents of their pupils. Creativity 'enablers' include teachers' willingness to take risks, for example in using role-plays or simulations in their teaching repertoire. A disposition to using such teaching

³ An anti-positivist position that accepts the world as real, but not fully understandable. Natural and

techniques was explored in the specialist routes assignment and a repositioning of my research interests from investigating non-didactic approaches to teaching to creative approaches features in the thesis. Barriers to creativity such as the imposition of governmental regulation accompanied by a rigorous and uncompromising inspection framework were investigated in a number of the 5000-word assignments and the IFS.

In chapter 4, I explore subject knowledge and pedagogy. This chapter clearly sits comfortably with my professional work as a teacher-educator and can be seen as complementary to all the previously submitted assignments. In chapter 5, I return to the theme of curriculum which was explored in one of the 5000-word assignments and the IFS.

I have never looked upon the EdD as just a qualification to be passed but, rather, as a personal journey of learning. The journey is one of professional development and the various assignments that I have undertaken reflect my professional interest in what constitutes good teaching in business and economics education. This interest manifests itself in a number of strands. One is concerned with the nature of reality and here epistemological, methodological and ontological considerations have been considered and examined. Another strand is concerned with my work as a teacher-educator and this has proved to be the strongest link in all of my work.

I started my doctoral journey as a teacher, as someone who was good at making the complex appear simple, straightforward and understandable. I now understand what it is to be a scholar and I have come to appreciate complexity, uncertainty and the co-existence of multiple realities.

social sciences may share the same methodology, but not necessarily the same method.

Chapter 1: Introduction

This thesis covers three key areas that are discrete and yet also inter-related. It is about teaching: good teaching. It is about teaching and teacher education. It is also about teaching business and economics.

In writing this thesis, I believe that I am making an important contribution to the field of business and economics education by combining existing theory of knowledge, pedagogy, curriculum and creativity to form a new conceptualisation of what constitutes good teaching in business and economics.

In the preface, I looked back to my own schooldays. I will now exemplify a particular point with reference to the person whom I consider to have been my best teacher at secondary school - Mr Thomas, who taught me History.

I remember that, at primary school, History was my worst subject. History was about learning dates. I remember learning dates for homework - arbitrary dates that meant nothing to me. I remember being tested and getting the dates wrong and being hit over the hand with a ruler after being accused of not doing my homework properly. Not surprisingly, I hated History and loathed learning it.

At secondary school, with Mr Thomas, learning History became a so very different experience, and my attitude towards it was transformed. This was because Mr Thomas had the skills, enthusiasm and insight to make the study of History genuinely engaging. He made it become not only alive, but also relevant. During lessons on pre-historic man, we made spears from bamboo, stone and string and (in the days before risk assessment came so much to the fore) tried them out in the playground. We participated in role-plays in the classroom, and we had debates. History was so relevant and so interesting

that it became my favourite subject. I remember enjoying doing homework, making notes from the textbook and writing-up the activities we had done in lessons.

Most of my other teachers at my first secondary school were good too, but the 40,000 word limit of this thesis precludes me from elaborating. The point I am making is that a good teacher can make a significant difference in a child's education. Looking back through the eyes of a teacher-educator, I can see that the majority of teachers in the first of my two secondary schools worked hard to create interesting and appropriate lessons.

Later on, I went on to the grammar school to study A levels. This is where I met with a culture shock: I encountered lazy, didactic teaching. I recall my first A level History lesson where the class was instructed to read a chapter of a textbook and to make notes. History, once again, became excruciatingly boring. In hindsight, I encountered complacent teachers who got away with poor teaching because they had bright, motivated students who succeeded because of factors outside the classroom. Examination results do not tell a full story and, taking this argument further, league tables of schools may be inaccurate indicators for parents who are seeking a 'good' school for their children.

During my own PGCE in 1985, I recall being inspired by Postman and Weingartner's (1971) book, *Teaching as a subversive activity*. The book was not about subversion as the title suggests, but about developing pupils' independent thinking. What was proposed, if I remember correctly, was a pedagogy of interactive teaching. The contrast with my secondary and grammar school experiences could not have been sharper.

In my current role as a teacher-educator, my beginning teachers sometimes ask to be placed in a 'good school' and I always take time to unpick what they may mean by a good school. Undoubtedly, some wish to teach in schools

where pupils achieve good results as measured by A level and GCSE passes and ones where pupils are motivated and well-behaved. Yet, indubitably, the beginning teachers may receive a better teacher-education in a school that has on its roll some challenging pupils, and where teachers are supportive and act as insightful mentors. In this scenario, beginning teachers can learn the 'craft' element of effective teaching much faster than in a 'good' school where mentoring may perhaps be less effective.

In one of my earlier EdD assignments (Brant, 1999), I looked at the disposition of beginning teachers towards the use of non-didactic teaching approaches. Black (1998) points out that the opinion of a layperson is that teaching is about the transfer of knowledge. In such a conceptualisation, it follows that a didactic style of teaching would be the most efficient in 'delivering' a subject.

Now, most beginning teachers starting a PGCE course would not have had much exposure to classrooms since leaving school themselves, and so their major point of reference would be their own experiences while at school. In my research for the aforementioned EdD assignment, I discovered that the vast majority of beginning teachers had experienced predominantly didactic teaching when they were pupils themselves. So, my concern is that beginning teachers may copy that model of teaching, and that, in so doing, they may perpetuate a flawed pedagogy.

The aim of this thesis is therefore to explore what constitutes good teaching in business and economics education. As a teacher-educator, I wish to understand more fully the constituent elements of teaching that lead to effective learning by pupils. I am making an assumption in this thesis that good teaching will contribute to pupils' learning. It is, however, beyond the scope of this thesis to investigate directly the consequences of teaching on pupils' learning.

To this end there is an underlying research theme that runs through this thesis: developing ways for business and economics teachers to develop a critical stance towards reductionist and static conceptions of subject knowledge in order to teach in a meaningful and creative way. My central argument is that strong subject knowledge combined with a creative approach is the key requisite to good teaching. However, my business and economics education beginning teachers do not have a *carte blanche* in how they approach their teaching for they are constrained by curriculum considerations and within-school considerations. The business and economics curriculum may actually act as an inhibitor to the beginning teachers' creative endeavours; in particular they may be under pressure from their teacher-mentors to cover a substantial amount of subject content. This pressure will undoubtedly have an influence on their teaching approaches and my concern is that beginning teachers may be persuaded to pursue an overly didactic approach that may be detrimental to their pupils' learning.

It is my argument in this thesis that the inter-relation between creativity, subject knowledge and curriculum has been under-examined with regards to good teaching in business and economics. Chapters three, four and five are in effect critical reviews of the literature on creativity, subject knowledge and the curriculum pertaining to the teaching of business and economics.

Chapter 3 examines the importance of creativity in effective teaching and learning. Perhaps it was the phenomenon of globalisation and intensified world competition that sparked the recent interest in creativity (Henry, 2001). In England and Wales, the NACCCE report (DfES, 1999) extolled the virtues of creativity in education and the report supported a democratic definition of creativity that argued for more creativity in all secondary classrooms (i.e. creativity should not be seen as just a realm of the arts). The report encouraged teachers to take a creative approach in the planning of their lessons, but more so, it suggested that teachers should teach in a way that would develop the creativity of their pupils. However, creativity is a

problematic concept in that surely it is 'good' to be creative and 'bad' to be uncreative. I argue that creativity is best conceptualised as a social concept rather than as an individualistic one. This chapter is generic in nature; subject-specific considerations are explored in later chapters.

In Chapter 4, I explore knowledge in relation to teaching and learning. Ontological conceptualisations of knowledge as a static body of knowledge tend to suggest a disposition to a didactic pedagogy and it is ironic that universities and public schools have, until recently, all too often bought into this conceptualisation.

Positivistic notions of knowledge are now largely discredited and it is social constructivist ideas that are viewed more credibly and the arguments I present in Chapter 4 are based on such epistemological conceptualisations. I argue that teaching is still under-conceptualised and that teachers possess tacit knowledge that they find difficult to articulate. I explore Eraut's (1994) ideas that teachers' expertise is multi-faceted and Shulman's (1986a, 1986b, 1987) ideas that teachers possess a number of knowledge bases: content knowledge; general pedagogical knowledge; curriculum knowledge; pedagogical content knowledge; knowledge of learners and their characteristics; knowledge of educational contexts; and knowledge of educational ends. Again, this chapter is generic in nature with subject-specific considerations being explored in later chapters.

In Chapter 5, I explore issues of curriculum. I contextualise my arguments of creativity and knowledge in terms of the business and economics specifications that are available to teachers. Knowledge of the curriculum was described by Shulman (1986b) as the teachers' tools of the trade, yet the available curriculum is influenced both directly and indirectly by the state. The imposition of a National Curriculum, the perceived academic-vocational divide and the championing of Specialist Schools, for example, have all had a

profound impact on the recent teaching of business and economics in secondary schools in England and Wales.

Chapter 6 explores the teaching of taxation. It articulates the tensions between creative approaches to teaching about taxation that may help enable deep learning in pupils and teaching approaches that use off-the-peg and easy-to-use resources which may be time-saving but not as educationally effective.

Chapter 7 describes the use of innovative fieldwork in Krakow as a way of developing subject knowledge and creativity in beginning teachers of business and economics.

Finally, Chapter 8 offers an encapsulation of my arguments.

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Chapter 2: Methodology

Philosophical considerations: ontology, epistemology, methodology and methods of enquiry

Ontology is the study of the nature of reality; it is a metaphysical concept that deals with the structure of knowledge. Ontology is concerned about the features of experience that are real and those that are apparent (see Kant, 1788). Epistemology may be described as the theory of knowledge. It is concerned with the nature and limits of knowledge; it examines the structure, origin and criteria of knowledge. It is also concerned with the relation between the knower and the object known, the possible kinds of knowledge and the degrees of certainty for each kind of knowledge, the nature of truth, and the nature of and justification for inferences (*ibid.*).

Determining which research approach is most appropriate for a particular project is an epistemological problem that is influenced by the researcher's ontological beliefs. The belief in an objective world will tend to favour quantitative research that is methodical and replicable. The belief in a 'softer' world will tend to favour qualitative research that searches for understanding. It would not be inconsistent, however, for researchers to share a common ontology but differ in their epistemological approach. The debate as to whether social *science* is possible is relevant in this discussion. For example, proponents of hermeneutic approaches in educational research may accept a positivist approach to the natural sciences, but argue that the methods of these sciences cannot be used in the social sciences (see Blaikie, 1993).

Methodology is the analysis of how research should or does proceed. It is concerned about how theories are generated and tested and what kind of logic is used. It concerns how theoretical perspectives are related to research problems. *Methods* are the actual techniques used to gather and analyse

data during research. Any conclusions reached about the relative strengths and weaknesses of different approaches depend upon one's ontological and epistemological position (Cohen & Manion 1994).

One of the most sought after ideals in research has been that of objectivity; indeed an accusation of subjectivity may be one of the most damning criticisms of a piece of research. The researcher thus diligently tries to eliminate his or her subjectivity, tries to be procedurally neutral and tries to undertake the said research rigorously and systematically. Usher (1996) describes such research as being on epistemologically firm ground.

The above paragraph is consistent with a positivist position which derives from the eighteenth and nineteenth centuries, the age of enlightenment. Science was seen to have the answers to the problems of the universe and it was believed that 'truth' could be discovered through observation and experimentation. The primary ontological and epistemological assumption of positivism is that the world is objective in the sense that it is independent of its knowers and thus by using scientific methods it is possible to discover universal laws. The implication of this is that it is possible to have intersubjective validation: different observers exposed to the same data would come to the same conclusions. It is beyond the scope of this thesis to offer a detailed critique of the positivist position, but as a philosophy of science it has been subjected to strong criticism (see Blaikie, 1993).

The problem with educational research based on such positivist epistemology is that its ontological assumptions about the nature of the world, that it is orderly, lawful and hence predictable, are highly problematic. Kuhn (1970) argues that social events, processes and phenomena in social research are more usefully seen as open and indeterminate.

In contrast to positivism, the hermeneutical approach may be more appropriate for social or educational research given that it may not be

possible to generalise, to predict or to control variables whereas to give meaning is desirable (Scott and Usher, 1996). Hermeneutic epistemology assumes that human action is meaningful and that to explain the social world one must understand it and make sense of it. The role of the researcher is therefore to make sense of the context through an interpretative framework and, hence, both the subject (the researcher) and object (the subjects of the research) have the same characteristics of being interpreters. This process of double interpreting is referred to as the double hermeneutic (Usher, 1996).

Hermeneutic epistemology takes place against a background of assumptions, beliefs and practices of the world. This poses the problem of how researchers can be objective about the meanings produced by the research. Gadamer (1977) argues that it is impossible to escape from our 'pre-understandings' even temporarily, so rather than bracketing or suspending them, researchers should use them as the essential starting-point for acquiring knowledge.

In educational research, some researchers would not restrict themselves purely to positivistic or hermeneutic frameworks; rather, they would take a pragmatic approach and choose from an eclectic range of methods that are 'fit for purpose'. Post-modern thinking suggests that there is no grand narrative and so a quest for a single truth is a forlorn one. Post-modernism is not so much an alternative to positivist or hermeneutic approaches; it is a belief system that appreciates the complexities of this world and the difficulty of having certain knowledge of it (Scott and Usher, 1996).

To do research in a post-modernist way is to take a critical stance, to focus not so much on the world, as on the way the world is represented. It is to be reflexive while using whatever instruments appear to be most appropriate for what is to be discovered. Postmodernism is consistent with a pluralist methodological approach using fitness for purpose as a guiding rule for the particular methods that are applied (Scott and Usher, 1996).

A post-modernist approach

In this thesis I take a post-modernist stance, in the sense of the term discussed above. I have not followed the conventional and safe path of a traditional doctoral thesis that starts with a research question followed by a literature review and chapters reporting on research. Rather, I have taken a critical stance in examining issues of creativity, subject knowledge and curriculum pertaining to good teaching in business and economics. I have then offered exemplification of my arguments in two research chapters.

Nevertheless, my thesis follows a broad research theme: developing ways for business and economics teachers to develop a critical stance towards reductionist and static conceptions of subject knowledge in order to teach in a meaningful and creative way

In this thesis, I have used a variety of research methods that I believe have been fit-for-purpose. They have included approaches that have traditionally been associated with positivist frameworks, namely a telephone survey and a questionnaire, and approaches that are more common in hermeneutic frameworks, namely focus groups, diary research, textual analysis and personal constructs. I present detailed accounts with discussions of the methods used in chapters six and seven.

The nature of an EdD is somewhat different to a PhD. It is a professional doctorate and my writing reflects my professional work and interests.

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Chapter 3: Creativity and Teaching

Background

The concept of 'creativity' is not new but it has been historically associated with the Act of Creation. For example in Ancient Greek times, Plato enquired of the nature of 'man' and whether 'man' had free will; to him it was evident that this was the case (see Plato's Protagoras). Thomas Aquinas who believed that God had decreed beforehand all action that will ever take place offered the opposite opinion (see Summa Contra Gentiles). While debated vigorously by philosophers and theologians over the last three centuries, the Mysterious concept of creativity is clearly not relevant to the business and economics classroom of 2006.

The launch of the Soviet spacecraft *Sputnik* in 1957 renewed interest in creativity in the USA. The Russians beating the Americans into space appeared to suggest that American engineers were not creative enough and a way forward was to make Americans more creative. A starting point seemed to be with the education system and research was directed into this area (Cropley, 2001). Guilford (1967) argued that conventional concepts of intelligence that were being used in schools, focused too strongly on speed, accuracy, correctness, and logic; such properties being the aspects of what he described as convergent thinking. He argued that while these were important, they should not limit the conceptualisation of human thinking. Qualities such as seeing alternative possibilities, generating alternative answers and seeing connections are aspects of divergent thinking and this divergent or creative thinking was to be promoted in schools.

Henry (2001) argues that the increasing pace of change and globalisation of the last few decades has further stimulated interest in creativity. Globalisation has led to more competition and in order to remain competitive, companies

have had to become more responsive to change, more flexible and by implication have had to foster the creative talents of their workforce.

The notion of creativity has surfaced as a concept in educational debates in England and Wales. For example, the National Advisory Committee on Creative and Cultural Education commissioned by the British Government had as its subtitle *Creativity, Culture and Education* (DfES, 1999).

But what does the concept of creativity really mean? Its meaning may well vary between subject disciplines in much the same way as 'beauty is in the eye of the beholder'. One problem is that 'creativity' is a value-laden word with a 'feel-good' factor i.e. it is surely 'good' to be creative and 'bad' to be uncreative. Another problem is that of the concept risks being too all-inclusive and too general to be of much practical use and as a result, it may be problematic to derive an objective definition of the term. Nevertheless, I believe that the concept is of value in developing capable teachers of business and economics. I believe the combination of strong pedagogic subject knowledge and a creative approach to teaching indeed leads to effective teaching.

In sociological circles, creativity has been defined as a category with many meanings and a large margin of uncertainty (Klus-Stanska, 2003). Many theories of creativity co-exist and supplement each other, but also often contradict each other. In order to work towards a working definition of creativity, Klus-Stanska contrasts two kinds of behaviour in dealing with emerging problems. An example of non-creative behaviour maybe for a teacher to recognise a problematic learning situation in his or her classroom and respond in a mechanistic way based on models learned for example on a teacher-training course. One can imagine the scenario of a teacher repeating the same explanation and being at a loss to why some of his or her students do not appear to understand. Contrastingly, a creative approach may be for the teacher to ask the class pertinent questions and to devise novel scenarios

which relate to the pupils' own experiences. Such an approach cannot be routinely taught in a university teacher-training department, but it can be articulated and beginning teachers can be encouraged to experiment with innovative strategies.

My interest in creativity is in its contribution to effective pedagogy, specifically in the Secondary school business and economics classroom. Therefore in terms of literature review and development of argument, certain conceptualisations of creativity will not be described, analysed or developed.

Firstly, I am not interested in creativity from a psychological perspective and so literature on creativity and cognition has not been reviewed. Indeed, the mechanism of creative thought remains unclear, if indeed the mechanism of any kind of thinking can be said to be completely understood.

Secondly, I am not interested in creativity from a perspective of the Arts. While much literature exists on understanding and developing the creative talents of for example, musicians and fine artists; I have not been able to ascertain significant transferable concepts that are relevant to the business and economics classroom and therefore I have not pursued this avenue of enquiry.

Thirdly, I am not interested in creativity from the sole point of view of gifted and talented children. There is a wealth of literature in this area and I will draw on some of that literature where I feel it is compatible with a 'democratic' conceptualisation of creativity that I develop below. Likewise, there is an extensive literature on 'the genius' with many studies about the world's most exceptional people. This literature will not be reviewed, as there appears to be little relevance to the business and economics classroom. Maslow (1954) drew an important distinction between 'special talented creative people' who have a special aptitude and who may or may not be well adjusted, and 'self-actualised' creative people who are mentally well-adjusted, lead rich,

productive lives and tend to operate in a more flexible way. In a sense, we can all aspire to be the latter and I will view creativity as a quality that all people possess and something that may be nurtured in the right environment.

Creativity and intelligence

The Butler Education Act of 1944 provided an entitlement to free secondary education for all pupils in England and Wales and a key role for local education authorities in contributing to educational provision. While the Act established three types of schools within the state sector: Grammar, Technical and Modern, in practice, a bi-partite system of Grammar Schools and Secondary Modern Schools very largely emerged. The 11-plus examination was taken during the sixth year of schooling and approximately a fifth of pupils passed this exam and were awarded a grammar school place (Chitty, 2002). At the time it was believed that people had an inherent intelligence quotient that stayed with them for the entirety of their lives and furthermore that this IQ could validly be measured. But IQ testing became increasingly controversial as the underlying assumptions were challenged and there developed a growing movement opposing the 11-plus examination. The 1960s and 1970s saw the growth of comprehensive schools and the wholesale abandonment of 11-plus testing (*ibid*).

Robinson (2001) states that there is a fundamental problem with Western education systems and that academic education looks only at certain sorts of ability. He asserts that education should be a process that develops one's natural abilities and that fostering creativity is consistent with such educational goals. He highlights an ambiguity in the idea of academic ability with there being much more to intelligence than academic ability and more to education than developing it. He argues that intelligence is multi-faceted, complex and dynamic and that a fresh understanding of it is needed. He

states that most people do not know what their creative capacities are and are worried about the processes involved in finding out.

In the 1960s and 1970s there was an abundance of research into measurement of creativity; Torrance and Goff (cited in Cropley, 2001) identified 255 different creativity tests. Most of the tests measured aspects of divergent thinking such as fluency of thinking, flexibility of thinking and originality of thinking. An example of such a test may be for the participant to be given one minute to write down as many uses of a paperclip as he or she can think of. Just as IQ tests have become viewed by many as disreputable (Gardner, 1983), in that they measure specific convergent skills rather than intelligence per se, so too creativity tests are hugely problematic. One can question what these tests actually measure and perhaps more significantly what they do not or cannot measure.

Baer (1998) criticises the use of divergent thinking tests due to their theoretical basis of generality. His research provides evidence that creative production is not only content specific, but also task specific within content areas. This may explain the perceived lack of predictive and discriminant validity for content neutral divergent thinking tests (Plucker, 2004).

Fryer (1996), drawing on a large primary research project with English Secondary and Primary schoolteachers, states that teachers are reluctant to administer creativity tests, partly because they feel that it duplicates their own assessment of pupils and partly because they do not want education to be reduced to teaching to the test. She argues that the nature of creativity is such that there cannot be any definitive assessment criteria so to assess pupils' creativity, teachers can simply monitor their work and behaviour.

Cropley (2001) argues that creativity and intelligence are neither identical nor completely different but are interacting aspects of intellectual power with a combination of the two being needed for creative achievement. He states that

a minimum level of intelligence is necessary for creativity to be possible. Gardner (1983) views creativity not as a level (akin to an IQ) but as a way of applying intelligence. Gardner argues that there is persuasive evidence for the existence of several relatively autonomous human intellectual competences or intelligences. From this it may be argued that creativity can be viewed as a psychological potential for all people regardless of level and so the creation of new ideas may be nurtured in everyone. This notion becomes a very powerful one when applied to the world of education.

The concept of an intelligence quotient is a human construction and it is questionable if IQ is indeed a measure of intelligence. If intelligence is associated with convergent thinking and creativity with divergent thinking then these two concepts appear to be polar opposite aspects of intellect. But these associations are themselves too simplistic; there is much more to intelligence than convergent thinking and there is much more to creativity than divergent thinking. A combination of both intelligence and creativity are needed for developing intellectual ability.

Towards a definition of creativity

'Creativity' is a term of such general use that its meaning has become somewhat vague. Henry (2001) describes the view of creativity in the 1950s as being focused on the 'gifted few'. In the 1960s, creativity was conceptualised more as a skill of mental flexibility than something that could be learnt and research became focused on how creativity could be measured. In 1970s the role of relevant experience and expert knowledge was more appreciated and in the 1980s attention was drawn to 'intrinsic motivation'. Since the 1990s more emphasis has been placed on 'environment and culture' (*ibid*).

Bruner (1962) stated that creativity involved *achieving surprise*, but this is clearly an under-conceptualised definition. One can imagine an example of an idiosyncratic teacher teaching an unusual lesson. In an Arts subject this may be sufficient for it to be described as creative, but in a business or economics lesson an eccentric lesson will be just that. Without relevance to the class and to the subject matter, the lesson is unlikely to be effective and without evidence that pupils' subject knowledge has been developed, then to describe the lesson as creative is unhelpful. This line of argument implies that creativity may not be the same in all fields; in other words creativity may be domain specific. Expertise in a particular field may be necessary with creativity arising from chains of ideas and a communication of those ideas being a necessary phenomenon for creativity to be validated.

It is now perhaps pertinent to pose an epistemological question about creativity: does creativity have an 'essence'? For example, Einstein, alludes to the central role of creativity in scientific discovery:

In the temple of science are many mansions and various indeed are they that dwell therein and the motives that have led them there. Many take to science out of a joyful sense of superior intellectual power; science is their own special sport to which they look for vivid experience and the satisfaction of ambition; many others are to be found in the temple who have offered the products of our brains on this altar for purely utilitarian purposes. Were an angel of the Lord to come and drive all the people in these two categories out of the temple, it would be noticeably emptier but there would still be some men of both present and past times left inside.

The supreme task is to arrive at those universal elementary laws from which the cosmos can be built up by pure deduction. There is no logical path to these laws; only intuition, resting on sympathetic understanding of experience, can reach them. (Einstein, cited in Pirsig, 1974, pp105 & 106-7)

So is creativity essentially the same in business or education as in science? Csikszentmihalyi (1996) argues that creative achievement is a process that unfolds over a lifetime and that creativity is more difficult than many overoptimistic accounts have claimed. A genuine creative accomplishment is

not the result of a sudden insight but comes from years of hard work and involves genuine expertise in the field of study. The intuition that Einstein refers to is the result of deep understanding of science and the making of interesting and relevant connections by research scientists. It is what Thomas Edison may have described as 99% perspiration and 1% inspiration. In business, the process of analysis and investigation may involve the highest levels of creativity and insight, but the nature of that creativity is different from that met in the sciences. An expert knowledge of the business field is required which requires different thinking processes. Mansilla and Gardner (2004) argue that there are no generic problem solving abilities because different problems require different thought processes. Lave and Wenger (1991), who researched situated cognition in a number of different settings, found that knowledge and skills were learned from experts in the context of everyday activities but that the learning was not transferable between settings. My conclusion is that creativity does not have an essence but is different in different subjects.

The Enlightenment led to a view of knowledge and intelligence dominated by deductive reasoning and ideas of scientific evidence. The Enlightenment was positive in that it gave 'man' a sense of his own destiny. The period was marked by great scientific achievements and an optimistic view of the future. But associated with it was a positivistic ontology, a belief in a single truth that can be discovered. Robinson (2001) argues that these ideas were reinforced by traditional schooling that encouraged a pedagogy of transmissive knowledge but at a price to pay: it resulted in a loss of creativity. For example, in her analysis of over 1000 lessons, Montgomery (1999) found that 70 percent of periods were taken up with teacher talking, while only 1 percent involved high-level cognitive challenges. This may be partly the fault of an overfull curriculum, with teachers feeling the need to cover the syllabus, but this situation is damaging to both the creative process and indeed may also be detrimental to gaining high examination grades (Lambert and Lines, 2000). While not wanting to get distracted into the polarised debate between

'traditional' and 'progressive' teaching methods, Petty (1993) argues that there is a balance in all good teaching between formal didactic teaching and more process-oriented approaches. A creative approach to teaching and learning should improve pedagogy, improve deep learning and therefore by default it should improve academic results. In our present system, children with strong academic abilities often fail to discover their other abilities while those of lower academic ability may have other abilities that lay dormant. In those pupils, this may contribute to feelings of failure and may lead to their becoming disaffected and resentful (Robinson, 2001).

Rawlinson (1981), writing for the British Institute of Management, sees creativity in terms of problem solving for business. He describes two types of thinking: *analytical* which follows a logical approach to identify a unique or predictable answer and *creative*, which requires imagination and leads to more than one answer. Rawlinson's conceptualisation of creativity as problem solving is not original. Guilford (1967) identified four stages of problem solving: recognition that a problem exists; production of a variety of relevant ideas; evaluation of the possibilities and drawing conclusions which lead to solutions. Guilford differentiated between convergent thinking and divergent thinking, which he described as creative. de Bono (1991) invented the term *lateral thinking*, unlike conventional thinking which is logical and sequential in nature, lateral thinking requires 'leaps of faith'. For de Bono, this thinking 'outside the box' of everyday issues is an example of creative thought. With reference to the business world, Crème (2003) argues that many employees are afraid to think laterally to solve problems in new ways, are afraid to innovate, and are not creative because they are too conformist. This implies that the working environment may influence creativity; certain environments being inhibiting, while others are enabling of the creative process.

Cropley (2001) defines creativity as the production of novelty. He takes a democratic view of the definition, looking at potential creativity in all people.

Nicholas (1972) argues that creativity is a personal trait in all people, but present in different degrees. He states that it is impossible to have zero creativity just as it is impossible to have zero intelligence. In other words, we are all creative, but to varying degrees. Csikszentmihalyi (1996) argues that creativity does not happen inside people's heads but in the interaction between a person's thoughts and the socio-cultural context. So for Csikszentmihalyi, creativity is a systemic rather than an individual phenomenon.

The literature suggests some commonalities in the definition of creativity, but also some differences. Creativity can be seen in terms of its effect; i.e. in terms of outcomes. Examples of such outcomes may be artwork, musical compositions, business plans and in an educational context lesson plans. So, in terms of this conceptualisation, a business studies lesson could be viewed as being creative (or not). This conceptualisation is valid to a degree, but does not explore the reason for the creativity, i.e. the act of creation. Creativity can be seen in terms of its cause, in terms of people who are creative. People will have a combination of psychological factors which enables them to be creative. These factors will include their abilities, knowledge, skills, motives, attitudes and values. While some people may have an inherent ability in a particular field (e.g. musical) others may gain ability through experience and training and they will develop domain specific knowledge. For example, a teacher of business studies who has a relevant degree, relevant industrial experience and relevant classroom experience can become an expert in the business studies classroom. This expertise, together with an optimistic approach, flexibility and the courage to make mistakes, will contribute to making him or her a creative teacher.

Creativity can be seen in terms of environment as certain environments may be conducive to creative approaches while other environments may inhibit the creative process. The environment is itself a problematic concept and there

will be both individual and cultural considerations with reference to the creative process.

Let us consider the scenario of a school environment: a high achieving state secondary school where the senior management team are proud of their pupils' high examination results. Let us imagine didactic teaching being the norm with well-behaved pupils listening to their teachers. In this sort of environment, teachers probably work long hours in planning their lessons and in the marking their pupils' work. Such an environment is likely to inhibit creative teaching approaches, with many teachers fearing to try innovative approaches for fear that they may not be successful, but that is not to say that individual teachers are not creative in their own teaching.

Let us consider another scenario: a secondary school with a mixed intake of pupils. One can imagine a friendly school with hard-working teachers who are supportive of each other, but a school with its fair share of challenging pupils. The culture of the school supports interactive, pupil-centred approaches; teachers talk to each other and share resources and ideas. This environment will be enabling of creative approaches, but that is not to say that all teachers will be creative in their own classrooms. My argument is that the environment is not a passive medium but part of a social and cultural framework which must be considered as part of the creative process.

My professional interest in creativity is twofold. Firstly, in working with my beginning teachers I am looking to help them to be more creative in their lesson planning so that they can use their subject expertise in a way that engages with their pupils to make learning interesting and relevant. Secondly, I need to draw on my own understanding of creativity in order for me to help my beginning teachers conceptualise their professional work in term of pupils' learning rather than their own teaching. With such an emphasis on formative assessment, my beginning teachers will focus on the learning needs of their pupils (rather than on the content that they are

teaching) and therefore create appropriate lessons. There is an apparent paradox here for secure subject knowledge is necessary to be creative in one's teaching. In his discussion of the place of creativity in early years education, Prentice (2000, pp155-6) avers that:

All teachers use representations through which subject content is transformed into teaching material, but it is possible to identify qualitative differences in the representations chosen by teachers who function from a strong knowledge base. Such teachers reveal a deeper understanding rooted in concepts, principles and issues.

It is my argument that all people are capable of creative achievement and in the right setting creativity can be enhanced, developed and encouraged.

Conditions for Creativity

Rawlinson (1981) states that creative processes have traditionally been described as involving five steps. The preparation phase involves becoming immersed in a set of problematic issues. There follows an incubation phase where ideas 'churn around' at the threshold of consciousness and this is where unusual connections may be made. The next phase is that of insight, an example of which may be when Archimedes cried out 'Eureka'. The fourth phase is that of evaluation: judging the worth of the creation and deciding if it is valuable and worth pursuing. The final phase is of elaboration in developing the outcome. Csikszentmihalyi (1996) sees this cognitive explanation of the creative process as over-simplistic and implying linearity. He argues that sometimes the creative process may involve one deep insight and many small ones or that many small insights may be needed. The incubation may last for many years or perhaps just a few minutes. In terms of developing creative business and economics teachers, I do not see how this analysis is helpful.

From his study of phenomenological investigations, Steinberg (1988) identifies six facets of creativity: an expert knowledge in the field; insightful thinking in that field; an intrinsic motivation; a high degree of self-confidence; a flexible approach and a willing to take risks. Csikszentmihalyi, in offering a systems model of creativity (1996) looks at three aspects: the individual, the domain of knowledge and the social field. The 'domain of knowledge' consists of a set of symbolic rules and procedures; a symbolic knowledge shared by society. For example, expertise in economics could be described as the economics domain and expertise in teaching, a pedagogical domain. The 'social field' includes all the individuals who act as gatekeepers to the domain. It is their job to decide what new idea is a good idea, in other words they evaluate the worth of the new ideas. Creativity occurs when a person, operating within a domain, offers a new idea that is considered of worth by the gatekeepers of that domain. Creativity is any act, idea or product that changes an existing domain or that transfers an existing domain to a new one. The next generation will experience this 'creativity' as a norm in their domain.

From the literature, it is clear that expert knowledge of one's field is a prerequisite to the creative process. For example, Weisburg (1986) argues that one has to work in a field for ten years before being capable of achievement of great worth and Csikszentmihalyi (1996) states that a person cannot be creative in a domain to which he or she is not exposed. Henry (2001) argues that creative people tend to have problem finding abilities and an 'art' of recognising the important question. She states that all individuals have creative capacity, but that chance favours the prepared mind. Csikszentmihalyi (1996) states that creative persons love what they do and that they find enjoyment in the production of something novel. He also argues that creative individuals are remarkable for their ability to adapt to almost any situation and to make do with whatever is at hand to reach their goals. Robinson (2001) states that it requires an atmosphere where risk taking and experimentation are nurtured and encouraged.

Fryer (1996), drawing on her own primary research in English schools, argues that most teachers believe that creativity can be developed providing that there is an appropriate and supportive environment. She suggests that creativity development requires highly skilled teaching and those teachers who value this use terms like 'negotiated learning' and 'directive opportunism' to describe the kind of balanced approach they regard as most useful in their own teaching. She further argues that neither highly authoritarian nor laissez-faire approaches to teaching are appropriate in creating an environment that fosters creativity. She states that teachers need to actually *teach* and that pupils need to have the opportunity to get actively absorbed in interesting and relevant learning tasks.

From the above, we can start to construct the pre-requisites for a creative business and economics classroom and there are two separate but related aspects to this. The first is that of teaching creatively and the second is of teaching *for* creativity. Teaching for creativity involves initiating learning opportunities in pupils where the pupils' own creativity can be nurtured.

The creative business and economics teacher will have specialised knowledge in the business and economics field and furthermore he or she will have sound pedagogic knowledge: a competence in the use of various teaching techniques and an understanding of classroom dynamics. He or she will probably have previous business or commercial experience backed up by secure general knowledge. He or she will have high self-esteem and the confidence to experiment with different teaching approaches, take risks and be willing to be wrong on occasion. He or she will have an ability to recognise and define problems in a dynamic classroom setting and offer novel interpretations. He or she will be self-motivated and enjoy the challenge of the classroom and derive pleasure from the learning of his or her pupils. In planning for a creative learning environment, he or she will nurture certain qualities of learning such as skills in making connections between different parts of the syllabus, analysis and synthesis skills, an openness to new ideas

and experiences, a tolerance of ambiguity and a preference for complexity. These qualities may be developed in many ways, for example through group-work, role-play and discussion.

Cropley (2001) suggests that teaching methods are very important and he adds that discovery learning may be more effective than traditional pedagogy. He argues that there may be further motivational benefits from such a teaching approach resulting in a more positive attitude to school and to self. He argues that there is a key role for the teacher when devising student-centred activities, as a facilitator and as a planner. Crème (2003) explores the concept of 'playing', an example of which in a business education context would be role-play. She argues that normally students seem to spend too much energy in 'getting it right' for fear of failure or ridicule. In a role-play scenario the students are not afraid to be creative for they find themselves in an 'intermediate area' between the subjective and objective world. The learner and learnt are separate and autonomous yet at the same time interconnected.

Robinson (2001) argues that creativity flourishes when there is a systematic strategy to promote it. Applying Csikszentmihalyi's systemic model, our creative teacher will need expertise in economics and business theory, expertise in pedagogy, a positive disposition to creativity. He or she will also need to create the right classroom ambiance; one where ideas can be explored in a supportive and encouraging environment.

Discussion

Csikszentmihalyi (1996) states that there are two forces at work on individuals: a creative force and a force of entropy. The creative force encourages people to be innovative and exploratory in their behaviour. The

entropic force encourages people to relax and to conserve energy. One is torn between these two opposite forces with some people having more of the former and others more of the latter. If one accepts the benefits of creative approaches and one accepts that all people are capable of creativity and one wishes to develop creativity in teachers and their students, then one should affect the environment to favour creativity over entropy. A teacher can do this in his or her classroom by creating a safe learning environment for his or her pupils to explore ideas. A Headteacher can do this in his or her school by creating an ethos that is supportive of creativity and ultimately the government can do this through recommendations emanating from the DfES and other public bodies, appropriate educational legislation and an inspection regime which reports on and recommends good practice.

The National Advisory Committee on Creative and Cultural Education Report DfES (1999) defines creativity as 'imaginative activity fashioned so as to produce outcomes that are both original and of value' (page 29). This report raises the profile of creativity in the secondary school and makes it clear that creativity is not limited to the Arts subjects, but is beneficial in all subjects. The Ofsted report on creativity (2003) extols the positive benefits of teachers promoting creativity in their classrooms, yet a close reading of the report shows that thinking pertaining to creativity still focuses on Arts subjects. For example:

An English teacher in a poetry lesson, for example, shared a word association method when trying to shape an image which described the wet, grey landscape outside the classroom window...

Elsewhere an art Teacher described to a GCSE class the problems she was trying to solve in the design for the title page of the school magazine, which had to appeal to both parents and pupils. (Ofsted, 2003 p8)

In the report are references to design and technology and music, but not to business studies or economics. Perhaps the semantics of 'creativity' have changed, but the perception of creativity being linked to the Arts apparently has not. It has been my argument in this chapter that creativity is an

important concept in terms of effective teaching, and that far from being the prerogative and proper concern of only certain areas of academic knowledge and human experience, has a role and place in all of them.

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Chapter 4: Knowledge and Teaching

Introduction

In Chapter 3 I argued that a secure subject knowledge base was a prerequisite for creative teaching to be possible. In this chapter I explore notions of knowledge that are of relevance to secondary school teaching. I do not offer ontological or epistemological discussions about the nature of knowledge but I focus on articulating the types of pedagogic knowledge used by teachers.

McIntyre (1993) states that *theory* has been in danger of becoming a 'dirty word' in initial teacher education as initial teacher education courses have focused so much on the practical aspects of teaching. While the Inuit people of North America reportedly have some thirty words to describe snow (they need so many so as to enable them to describe the various conditions that they may encounter), when it comes to describing teaching and learning in the English language, there is a dearth of suitable vocabulary. The term 'pedagogy' has recently slipped into usage in England, but it is still an under-used and partly misunderstood concept. Arguably pedagogy has been under-conceptualised, perhaps because teaching is under-valued but also perhaps because of the tacit nature of a teacher's expertise; there has been a lack of recognition of teacher knowledge and teacher expertise (Van Manen, 1999).

One problem is that there is no consensus in the literature of what expert teaching might be and the kinds of knowledge that teachers need to possess (Turner-Bisset, 2001). Ofsted reports, for example, in discussing the quality of teaching, use terms such as 'competent', 'effective' and 'outstanding' to describe teachers' lessons. Ofsted inspectors follow a methodology that uses competency-based criteria for their assessment decisions and while there may be a fitness-for-purpose for its use in the Ofsted assessment framework, there are limitations to competency-based assessment (Wolf, 1995).

In trying to understand what Ofsted inspectors mean by 'competent', 'effective' and 'outstanding', one could start by inquiring as to what constitutes a good lesson. Does the lesson have to be relevant and worthwhile? Does the lesson have to be well-paced and engage students? Does the lesson have to cater for different student learning styles? Indeed one would imagine that a good lesson would have all of these qualities.

But how may one evaluate the effectiveness of the lesson? Does one focus on the teacher and what is taught, or on the learner and what is learnt? It seems logical to assume that there is a relationship between good teaching and effective learning and that an 'expert' teacher is someone who has proficiency in combining the subject content that he or she teaches with the needs of his or her pupils.

Cullingford (1995) offers five qualities of an effective teacher: integrity, learning, organisation, communication and humour. Kyriacou (1997, p120) offers ten characteristics of effective teaching:

- Clarity of the teachers' (sic) explanations and directions
- Establishing a task-orientated classroom environment
- Making use of a variety of learning activities
- Establishing and maintaining momentum and pace for the lesson
- Encouraging pupils' participation and getting all pupils involved
- Monitoring pupils' progress and attending quickly to pupils' needs
- Delivering a well-structured and well-organised lesson
- Providing pupils with positive and constructive feedback
- Ensuring coverage of the learning objectives
- Making good use of questioning techniques

The DfEE (2000) Hay McBer report identifies three groups of factors that influence pupil progress: teaching skills, professional characteristics and classroom climate. The report, however, makes no reference to the kinds of specialist knowledge that teachers may need and there appears to be an

implication in the report that effective teaching can be assessed against predefined standards (i.e. those described in 'Qualifying to Teach', 2002).

Shulman and Shulman (2004) aver that teaching makes extraordinary performance demands of teachers, and Eraut (1994) states that effective teaching involves utilising a whole range of different types of knowledge and expertise. The knowledge that teachers need is multi-faceted and a teacher needs a deep understanding of several different knowledge bases together with acquired professional expertise. Shulman (1987) suggests that there are seven such categories of knowledge bases: content knowledge; general pedagogical knowledge; curriculum knowledge; pedagogical content knowledge; knowledge of learners and their characteristics; knowledge of educational contexts and knowledge of educational ends. He identified pedagogical content knowledge as being of special interest: the blending of sound subject knowledge together with an understanding of pedagogy.

Knowledge for teaching

Lawlor (1990) describes the medieval view of teaching as one where only subject knowledge is necessary. i.e. where a deep knowledge of subject content is of primary importance. She adds that the university sector and the public school sector have subscribed to this conceptualisation until relatively recently. Bolhuis & Voeten (2004) argue that secondary school teachers have traditionally conceived subject matter as a static body of knowledge to be transmitted to students. When the teacher is 'imparting' such facts and procedures, then learning takes the form of passive absorption of knowledge. The work of social constructivists such as Piaget, Vygotsky and Bruner has led to a more student-centred approach to teaching that depends largely on learners' activities and within which the pedagogical skills of the teacher can actively promote better learning. This conceptualisation of teaching requires learners to be independent thinkers and to critically examine the procedure of knowledge construction. Classroom activities devised by teachers subscribing to a social-constructivist conceptualisation of teaching are more

likely to require students' reasoning, discovery learning, problem-solving, data gathering, applying and communicating ideas.

Brown and McIntyre (1993) state that to be asked about the ordinary, everyday things that one does spontaneously, routinely and habitually in the classroom is to be presented with a very difficult task. They argue that teachers are unaccustomed to this, and that teachers find these the hardest to articulate and make explicit. Eraut (1994) states that technical knowledge can be written about and codified, but practical knowledge is learnt through experience and may not be suitable for codification. Loughran et al. (2003) state that in the teaching profession it is rare for teachers to consider what they know about teaching in ways that may be documented. When teachers talk to colleagues, discussions tend to be anecdotal and knowledge of practice is implicitly embedded (*ibid*).

Another problem is that teachers' knowledge may be elusive because the research community does not yet have the necessary language to discuss that knowledge adequately. Loughran et al. (2003) argue that, to improve the quality of student learning, it is important to uncover teachers' pedagogical knowledge and to document it in such a way as to enable the transfer of knowledge to the benefit of the teaching community.

Eraut (1994, p60), with reference to teaching, states that: "theories may be acquired from many different sources, for example, pre-course experience, school experience, student colleagues, university teaching and reading". Eraut distinguishes theory as 'public' and 'private'. Public theory refers to available theories such as Piagetian theory or Vygotsky theory. Eraut avers that public theories may be discussed, criticized and written about by teachers without affecting their practice: "they may not ever get used" (p63).

Private theories, in contrast, are conceptualisations in people's minds which they use to interpret or explain their experiences. Teachers will theorise about their own classroom experiences, other teachers' classroom dynamics, other teachers' experiences, pupils' understandings and so on; this teacher-theorisation may or may not be explicit, but much of it will be tacit, as teachers

are unable to articulate much of their theory. Tacit knowledge can be made explicit when either the person in question learns how to articulate it or if a colleague or researcher makes it explicit and receives the respondent's verification.

In looking at the classroom context of knowledge, Eraut (1994) argues that a teacher is not so much in a 'knowing' environment as in a 'doing' environment. While classroom research may describe and interpret teaching activities, one still has to acknowledge that seeing like an observer cannot be the same as seeing like a teacher, for a teacher sees from within an action and not from outside it. Moreover, the classroom is an ordered environment in which norms and routines play an important part and teachers develop implicit theories of action in order to make their professional lives more manageable. In teaching, there are so many variables to take into account at once that teachers develop routines and decision-habits to keep their mental effort at a maintainable level.

Eraut goes on to state that this evolution and internalisation of a theory of action is one aspect of learning to become a teacher who can cope in busy classroom environments and that, while in other contexts there may be systems to validate knowledge (for example in academia the citing of others' work), in the classroom context the only significant validation of knowledge are the teachers themselves. This in itself is not a problem but, if teachers wish to improve their own practice, Eraut recommends that evaluatory systems should be used.

Eraut's argument contrasts sharply with Shulman's (2004, p324) who states that teachers are not always aware of their own performances: "The act of teaching itself demands so much attention and energy that it is difficult for any teacher, especially when under some pressure, to monitor his or her own performance with great accuracy". Shulman gives the example of a student teacher whom he had observed who had planned to develop students' thinking through Socratic dialogue. In the lesson he had answered most of his own questions with the students listening passively, yet his perception of the lesson afterwards was that he had engaged effectively with his class.

Eraut (1994) suggests that a useful perspective may come from looking at other performing occupations. Most performing occupations offer considerable opportunity to observe master-performers at work both before and after initial training. Even after a long period of technical training, developing one's own style takes time; and one needs to see a range of other performers in order to learn, experiment, reflect and create one's own interpretations. Why then, Eraut asks, do teachers not get these kinds of opportunities?

He suggests two factors that may be of relevance. Firstly, teachers' career structures do not stress quality of classroom performance; although many teachers are still personally motivated by the ideal of quality performance. Secondly, INSET has rarely been presented to, or perceived by, teachers as a natural and on-going activity that is designed to help one to become a better classroom practitioner.

Huberman (1983) conceptualises teachers' knowledge as craft knowledge, which he describes as largely idiosyncratic and non-theoretical. Some authors are disapproving of teachers in this respect; for example, Jackson (1968) criticises teachers because their language is conceptually simple, because they seem uninterested in causes or underlying patterns, because they prefer intuition to analysis, and because, in spite of their lack of analysis, teachers are opinionated. But Huberman is supportive of craft knowledge and argues that improvements in teaching come from tinkering rather than from systematic reflection. Kennedy (2002) argues that the acquisition of craft knowledge is motivated largely by dissatisfaction with events and a desire not to repeat the same mistakes again. However, if teachers routinely notice problems (in their classrooms) and generate ideas for how to handle these situations better in the future, then a great deal of learning could follow from the process of self-evaluation (Huberman, 1983).

Fenstermacher and Soltis (1998) categorized knowledge into formal and practical knowledge. They describe 'formal knowledge' as resulting from the process-product studies on effective teaching and 'practical knowledge' as

the practical, personal, situated, local, relational and tacit knowledge. Fenstermacher and Soltis consider both kinds of knowledge as important in understanding how teachers learn to teach. Teachers will acquire systemic knowledge mainly through study at university, the reading of research articles, and the reading of professional journals. This knowledge tends to be theoretical, codified and abstract. In contrast to Eraut, Kennedy (2002) reports that many teachers are emotionally committed to what they had learnt in this way and that, as a source of ideas, systemic knowledge provides a unique contribution to teaching. Prescriptive knowledge is generally acquired through institutional policies and is characterised by 'should' and 'ought' statements. Kennedy suggests that many teachers show a complacent acceptance of prescriptive knowledge. While they show a sense of responsibility to ensure that students learn whatever content is required of them so that they will be adequately prepared for public examinations, teachers do subvert public policy legislation by filtering the stated requirements through their own prior beliefs and values systems.

Each type of knowledge described above offers its own benefits to teachers and teachers need an understanding of all of them. Acquiring new ideas comes from many sources and a consideration of one kind of knowledge certainly does not invalidate other types.

Knowledge bases for teachers

Turner-Bisset (2001) states that teaching is not a matter of skill or competency alone as teachers need a deep understanding of several different knowledge bases to develop sophisticated professional expertise. Shulman (1986) argues that the literature on teaching focuses on management of classrooms, organisation of activities, allocation of time for activities, assessment, praise, and questioning technique whereas the consideration of lesson content is under-conceptualised. Goodson (1998) states that relationships within subject matter remain unexplored and under-theorised.

Shulman (1986a, 1986b, 1987) states his interest in questions teachers ask and the explanations they offer. He is interested in where teacher explanations come from and how teachers decide what to teach, how to represent what they teach, how teachers question students about subject content and how teachers deal with problems of pupils' misunderstandings. Shulman observes that new teachers begin with expertise in the content they teach and an important issue for him is the transition they make from expert student to novice teacher. Fuller and Bown (1975) articulated a three-stage model of student-teacher development. They aver that concerns of student teachers shift outward from an initial pre-occupation of self to a focus on tasks and teaching situations, and finally to consideration of the impact of their teaching on pupils. However, subsequent studies have challenged this model of discrete stages (see Burden, 1990 and Guillaume & Rudney, 1993). These studies show that it is possible to discern a number of types of progression amongst beginning teachers and that there were no common starting points for all beginning teachers. Furthermore, beginning teachers showed different rates of development.

Nevertheless, the issue of transition remains and Shulman (1986) ponders how beginning teachers transform their content expertise into a form that secondary students can understand. For example, when faced with unclear texts from books, how does a beginning teacher generate new explanations, representations and clarifications? What are the sources of analogies, metaphors, examples and re-phrasings? How does the beginning teacher draw on expertise in the subject matter in the process of teaching? And what pedagogical prices are paid when a teacher's subject matter competence is itself compromised by deficiencies of prior education or ability? Shulman (1986a, 1986b, 1987) rejects the usual pedagogy-content dichotomy as ineffective and takes an in-depth look at content knowledge, which he breaks down into a number of constituent parts.

Subject content knowledge is concerned with the subject matter to be taught, and it encompasses what Bruner calls the structure of knowledge: the theories, principles and concepts of a particular discipline. It is concerned with the organisation of basic concepts (substantive structures) and the ways

to validate them (syntactic structures). Teachers must be able not only to define and explain the subject content that they are teaching to their pupils but also to explain why a particular proposition is deemed warranted and worth knowing (Shulman, 1986b).

General pedagogical knowledge is the generic knowledge about teaching gained from practice. The sort of knowledge to which Shulman is referring is knowledge of, for example, how to settle a class, how to attract and hold the attention of the class and how to manage educational resources. Much of general pedagogical knowledge appears to be procedural and learnt from practice; yet it is also likely, given that it is grounded in practice, that general pedagogical knowledge is constructed from innumerable 'cases' of teaching, and has a substantive base (Turner-Bisset, 2001). It follows that an understanding of pupils' learning is a necessary requirement for good teaching to be possible and that consequently the expert teacher will have a pedagogical repertoire of teaching techniques.

Shulman (1986b) describes curriculum knowledge as the 'tools of the trade' of teachers. Curriculum knowledge is knowledge of the curriculum in its widest sense, of the whole curriculum laid down for pupils, the programmes of study, and the kinds of curriculum materials used to teach each subject. Curriculum materials from other subjects are included to enable creation of cross-curricular connections. Teachers should also be familiar with what has been studied previously and what will be studied in the future.

Shulman (1986a, 1986b, 1987) reports various studies showing that teachers possess high levels of pedagogical content knowledge. For Shulman, pedagogical content knowledge conceptualises teachers' expert knowledge and in a sense it is an amalgam of various teachers' expertises. Teachers construct versions of reality that fit the experience of the context. Pedagogical content knowledge is knowledge that is constructed from knowledge of environmental contexts, knowledge of students, knowledge of pedagogy and of subject matter. It is knowledge that has been specifically crafted by teachers for fitness of purpose. In the early days of one's teaching, a fundamental concern for a teacher is how to communicate one's own

subject knowledge i.e. how can learners come to know and understand what the teacher knows and understands? The problem is one of representation: communicating concepts and processes of a subject discipline. For Schulman, representation is the process of turning subject knowledge into knowledge for teaching which lies at the intersection of subject knowledge, pedagogy and knowledge of one's students as learners.

Shulman (1986b) offers additional categories of knowledge bases that contribute to pedagogic content knowledge. Knowledge of learners includes general knowledge of what pupils of a certain age are like and specific, context bound, knowledge of a group of learners, i.e. 'my class'. Knowledge of educational contexts is in the broadest sense knowledge of all settings where learning takes place. Teaching contexts may have a significant impact on teaching performance, and there are a range of contextual factors that affect teachers' development and classroom performance. These include the socio-economic level of the catchment area; the type and size of school; the class size; the amount and quality of support teachers and other colleagues give to each other; the feedback teachers receive on their performance; the quality of relationships in the school; and the expectations and attitudes of the headteacher.

There is a further aspect to teaching and that is its socio-moral element. Shulman (1986b) states that teachers have both short-term goals and long-term aims and that teachers should be explicit of the ethical and moral dimensions in their thinking and in their lesson planning.

Transformation

Shulman (1987) states that the key to characterising the knowledge base of teaching lies at the intersection of content and pedagogy in teachers' capacities to transform content knowledge into forms that are pedagogically powerful and yet adaptive to the variety of student abilities and backgrounds. Shulman describes five sub-processes in the transformation process:

'preparation', 'representation', 'instructional selections', 'adaptation' and 'tailoring of instructions'.

Preparation involves examining and critically interpreting resources that will be used in the lesson in terms of teachers' own understanding of the subject matter. Representation involves thinking through the key ideas of the lesson and identifying alternative ways of representing them to students. This includes analogies, metaphors, examples, narratives and simulations that can help to build a bridge between the teacher's comprehension and that desired for the students. 'Instructional selection' occurs when teachers draw upon a range of approaches for teaching and learning, such as Socratic dialogue, discovery learning, project methods, learning outside classroom settings. Adaptation is the process of fitting the represented material to the characteristics of the students so as to reflect the characteristics of the students' learning styles. Tailoring of instruction entails fitting representations not only to particular students but also to a group of a particular size, disposition, receptivity, and interpersonal 'chemistry' (ibid).

Treagust and Harrison (1999) argue that expert explainers use imaginative and expressive devices to make sense of abstract, difficult and non-observable science concepts; in so doing they provide explanations that accommodate the explainer, the audience, the content and the context. Effective pedagogical explanations make use of language that makes sense to the audience by means of metaphors, analogies and stories. Russell and Shawl (1999) argue that teachers' knowledge is personal, context-rich and elusive.

Clearly, learning how to develop good representations is an important part of becoming an expert teacher. To illuminate my arguments with an example, I will now describe a lesson that I observed on human resource management (HRM) taught by a beginning teacher to a group of sixth formers studying for a vocational GCE. The beginning teacher, in an inner city Manchester Sixth-form College, had good classroom presence, made good use of space in the room and used question-answer teaching strategies effectively to develop the understanding of his students. His lesson was well paced and was broken up

into a number of episodes so as to provide variety and to maintain the interest of his students. In one part of the lesson, he related the technical content of job specifications to his students in two ways - through a case study that they were using as part of their summative assessment and through examples of part-time jobs of his students - the teacher had taken the trouble to investigate these prior to the lesson.

Throughout the lesson, students were engaged, answered questions correctly and at the end of the lesson made presentations that appeared to be appropriately pitched and focused. I deemed the lesson as 'outstanding' using my observational criteria.

Now I would like to hypothesise for a moment. What if the same lesson were to be taught to a different group of students in the same school? Would it be as successful? What if the same lesson were to be taught to a group of highly academic students in an independent school?

Such a hypothesis makes no sense, for it is not possible to teach 'the same lesson' again. While the content of the lesson may be broadly the same, the success of the new lesson depends on the teacher's skill in relating the content knowledge to the values and experiences of the students in the class. This point emphasises the importance of the social context to learning, differentiates learning from teaching, and demonstrates how a teacher can transform subject content knowledge into a form accessible to his or her students.

Over time teachers will develop a repertoire of subject knowledge representations from outside sources and by their own creativity. As these representational repertoires develop, teachers have more options in connecting pupils with subject matter. This is an important part of learning to teach.

Reflection

The reflective process includes reviewing, reconstructing, re-enacting and critically analysing one's own teaching abilities and then grouping these reflected explanations into evidence of changes that need to be made to become a better teacher (Lave and Wenger, 1990). Reflection is widely recognised as a crucial element in the professional growth of teachers. It is assumed that reflection is intrinsically good and that reflective teachers will improve as teachers (Calderhead and Gates, 1993). McIntyre (1993) describes three levels of reflection: the technical, the practical and the critical. He suggests that in the early stages of their teaching practice, beginning teachers reflect mainly on the technical, for example in achieving certain goals such as the management of group work. The practical level is more general and concerns articulating the development of one's own practice. Critical reflection concerns wider political, social, cultural and ethical issues and is, according to McIntyre, rarely practised even amongst experienced teachers.

Schon's (1983) argument is that professional expertise does not depend on the application of general theoretical knowledge but that what is important is experience-based knowledge. Schon distinguishes between knowing-in-action and reflection-in-action; if a teacher views reflection only as a means of judging his or her performance, then his/her prospects for improvement are somewhat stunted. If, on the other hand, he or she views reflection as a way of increasing his/her understanding of teaching and of themselves as a teacher then he/she will possess a powerful tool to help them improve (Schon, 1983, 1987).

Reflection *on teaching* focuses on what happens in a lesson and why it happens in that way. A teacher might focus on the way that a group of students seemed to struggle with an idea that he or she was trying to help them to understand. There are many different types of explanation that could be offered for this kind of problem: for example, teachers might explain it by arguing that the students had been ill-prepared or poorly motivated. Teachers might think that the students are simply 'weak students' and their failure to understand can be taken as evidence of their lack of ability. Alternatively teachers might look for explanations in the way that they taught the lesson.

Teachers might think about the way they communicated ideas: for example, 'Was my presentation clear?' or 'Did I rush through the steps in the reasoning?'. Teachers might think about their assumptions about the readiness of the students to understand this idea. What was assumed about their previous thinking and their ability to process information that was presented to them? What was assumed about their prior experience and what opportunities were given to them to work out relationships between new and old information? Each of these questions focuses on what happened and why it happened. Some beginning teachers will tend to explain the problem in terms of the students' abilities, some will explain the problem in terms of their communication of the idea and others will tend to explain the problem in terms of the assumptions they had made.

Reflection *on oneself* as a teacher begins when teachers ask themselves 'Why am I trying to explain what has happened in this way?'. Wood (1996) found that beginning teachers tended towards four different types of explanation that reflect different ways of conceptualising teaching:

- 'Teaching as imparting knowledge'; for example, one trainee described teaching as "...you get to transmit knowledge in a clear and logical way...".
- Describing teaching as 'preparing pupils to use knowledge'; for example, one trainee described what they tried to do as "...to adapt the knowledge that you have. In a sense try to extract it through the kids rather than giving it to them...".
- 'Providing opportunities for students to see the existence of different perspectives on a phenomenon'; for example, one trainee argued that "...having arguments in the lesson seems to make lot of sense...they were really having to think about it..." and another trainee referred to "...the teacher as the catalyst and pupils take it from there...the teacher starts something off and hopes the others will pick it up. Then it will evolve from there...the teacher can learn from the kids...".
- 'Preparing students to be reflective'; for example, one trainee described their teaching as "...pupils are given the opportunities to

interpret their understanding rather than just relating it to very structured knowledge..." (ibid).

For Wood, these four categories form a hierarchy. Many beginning teachers begin with the first type of conception, focusing on imparting what they know. Moving on from this way of thinking is crucial to making progress during the PGCE year.

It is my argument that it is more helpful to think of these different ways of thinking about teaching as a list of options rather than as a simple hierarchy. Developing as a teacher involves becoming more adept at recognising the circumstances in which it is better to think about one's teaching in one way rather than another. There are occasions when it is more appropriate to think of teaching principally in terms of communicating an idea clearly. There are other occasions when it is more appropriate to think of teaching as 'helping students to reflect on their understanding'.

Shulman and Shulman (2004) argue that critical reflections are at the heart of learning and that reflection is the key to teacher learning and development. In relation to reflective practice, Eraut (1994, p71) discusses beginning teachers' disposition to theorize: "If beginning teachers acquire and sustain this disposition they will go on developing their theorizing capacities throughout their teaching careers, they will be genuinely self-evaluative and they will continue to search for, invent and implement ideas. Without it they will become prisoners of their school experience".

Qualified teacher status

For beginning teachers to be awarded qualified teacher status in England and Wales, they must demonstrate a number of competences. These competences, known as *Standards*, are expressed in the DfES/TTA publication *Qualifying to Teach* (2002). The Standards are categorised into three sections: professional values and practice; knowledge and understanding; teaching. Professional values and practice refer to what Shulman (1986b)

describes as the aims of teachers in relation to the ethical and moral dimensions in their thinking and in their lesson planning. For example, Standard 1.3 states that teachers should “demonstrate and promote the positive values, attitudes and behaviour that they expect from pupils” (p6).

In relation to the second category of Standards, knowledge and understanding, Tickle (2000) argues that the Standards (he refers to the previously published Standards from DfEE circular 4/98) are based on the academic-vocational tradition, which asserts that teachers are the “substantial guardians and disseminators of cultural knowledge for new generations” (p40). For example, beginning teachers must show that they: “have a secure knowledge and understanding of the subject(s) they are trained to teach ...at a standard equivalent to degree level” (Qualifying to Teach, 2002, p7).

Tickle (2000) points to a number of problems with this view of the role of subject knowledge. He suggests that the subject-expert is still “defined within western traditions of nationalism, rationalism, and vocationalism”, and argues that even if this view of the teacher is sufficient for developed nations in the twenty-first century, current models of teacher education make it hard for students to achieve the “depth and range of expertise and the flexibility to handle multiple contents at both personal and pedagogical levels” (p41).

He suggests that, in the light of lack of expertise, three routes are followed. First, teachers may feel a sense of inadequacy, self-doubt and guilt and seek to develop coping strategies for compliance with curriculum content requirements. Secondly, teachers may acknowledge their deficiencies, and embark on a learning agenda that seeks to secure greater knowledge and expertise. Thirdly, teachers may develop attitudes of enquiry and openness centred on the diversity and dynamic of knowledge, its multiple cultural foundations, and its essential conventions and mysteries. It is perhaps this third route that represents an excitement about teaching and learning.

Part 3 of the TTA Standards refer to ‘teaching’ and I have reproduced a selection for consideration in Table 4.1.

Table 4.1 Extracts from the Standards for Qualified Teacher Status in relation to setting objectives and planning lessons

3.1.1	<p>They set challenging teaching and learning objectives which are relevant to all pupils in their classes. They base these on their knowledge of: the pupils:</p> <ul style="list-style-type: none"> • evidence of their past and current achievement • the expected standards for pupils of the relevant age range • the range and content of work relevant to pupils in that age range.
3.1.2	<p>They use these teaching and learning objectives to plan lessons, and sequences of lessons, showing how they will assess pupils' learning. They take account of and support pupils' varying needs so that girls and boys, from all ethnic groups, can make good progress.</p>
3.3.3	<p>They teach clearly structured lessons or sequences of work which interest and motivate pupils and which:</p> <ul style="list-style-type: none"> • make learning objectives clear to pupils • employ interactive teaching methods and collaborative group work • promote active and independent learning that enables pupils to think for themselves, and to plan and manage their own learning.

I will now consider the application of the Standards in Table 3.1 through a case study (Figure 4.1). This case study is provided by Rob Randall from the London Oratory School in West London. Although there are plenty of opportunities to observe what teachers do, it is less easy to infer the reasoning that underpins their practice. The lesson is an AS level economics lesson on 'Elasticity of Demand' and the principles are applicable to teaching other aspects of business and economics at other levels.

Figure 4.1: An example of a teacher's lesson planning

Lesson Objectives

“The Edexcel specification states that pupils should be able to ‘*define measure and interpret price elasticity of supply; price, income and cross elasticity of demand.*’ In writing this account I have tried to capture my thought processes as I planned, delivered and evaluated a lesson on the topic of elasticity.

Reference is sometimes made to the ‘heartbeat’ of a lesson. I take this to suggest a sequence of learning in which discussion is followed by teacher-centred activities, pupil-centred activities and then a plenary (usually through a question and answer session). Whilst it is very helpful to think of each lesson in chunks like this, I worry that this can lead to overlooking the bigger picture in which students are able to build up a holistic understanding of the subject, relating different parts of the specification and developing their ability to analyse and evaluate. The constant dilemma of covering content through a teacher-centred approach versus helping students to develop their own integrated understanding of the subject is one which plagues much of my planning.

Price elasticity of demand is a topic which regularly appears in examination questions. To emphasise its importance I often tell my pupils that it is used to test their powers of analysis and evaluation and can often be used in a wide variety of circumstances. I set myself objectives based upon what I want the pupils to learn. These are quite broad and based upon the course specification: 1) Pupils should be able to define and measure price elasticity of demand and 2) Pupils should be able to interpret price elasticity of demand and explain its significance in relation to consumers, producers and the government.

Lesson Organisation

Having established my objectives I begin every topic or lesson by letting the pupils know the intended aims by either verbal or written communication. I feel this is important to ensure the pupils themselves know the focus of their own learning. I often begin a lesson with a ‘way-in’ that introduces a topic by arousing students’ interest. Price elasticity of demand has many practical applications and I often start by asking one student about their buying habits to highlight how their demand for a product would be affected by its price.

When first qualified I would have approached this topic in a very teacher-centred manner. I provided the students with definitions, calculations and diagrams via a handout which I worked through with the class answering any questions. I was preoccupied with ensuring that students had ‘covered the topic’ in sufficient depth to answer examination questions. Over time my approach has changed as I realised that this strategy does not maintain students’ interest and this leads to failing to achieve the learning objectives. It took me a few years but I have realised that the teacher does not have to be talking for the students to be learning and that if you provide the framework the students can take responsibility for their own learning.

If they are to take responsibility they must have got feedback on their progress. I have got into the habit of building into my lesson plans a quick re-cap at the beginning of the lesson on the key ideas covered in the previous lesson and a five minute review at the end of a lesson on the work we have covered. Within the topic of elasticity this may take the form of a question and answer session on definitions. I might ask 'Is a product with a PED of -1.5 elastic or inelastic?' This also gives me an opportunity to focus on the quiet members of the group.

Another form of assessment to test the learning of pupils is the use of homework to examine knowledge and understanding of a particular topic. There are a number of textbooks which include a whole range of data response questions, but in the past I often used examination papers in an attempt to get the students accustomed to the examination format and type of questions. The students themselves are also very inquisitive to see the structure of the paper they will be taking. The one problem I find with setting examination questions for homework is that students will often spend a couple of hours in an effort to get the best possible grade. I would prefer them to spend 30 minutes (in the case of a data response question on elasticity) to develop their time management techniques. I now very rarely set examination questions for homework. Instead I give these questions as timed exercises within the classroom (student-centred strategy) and then with the use of discussion, the examination mark scheme and the students' self assessment as methods of improving performance.

Writing about my lesson planning has prompted me to wonder whether I should consider an alternative technique in which I give the students different products with different price elasticities of demand. I could then structure the lesson around supporting students' enquiry into the reasons for these differences in elasticity and the significance of the differences for each market."

(Davies and Brant, 2005)

Rob refers to the specification when deciding his lesson objectives which are written in terms of the achievement that he wants students to demonstrate. So he is clearly taking into account the expected achievements for students of this age range and ability. He also discusses the implications of his objectives for his style of lesson. He describes how his lesson objectives require him to design a lesson that gives students the opportunity to develop the analytical evaluation skills required by his lesson objectives. In fact, he goes beyond this by commenting on the need to think holistically about his objectives for students, rather than restricting his vision to a single lesson (QTS Standard 3.1.1). He comments on how he will assess students' learning and he refers to some advantages and disadvantages of the alternatives between which he is choosing (QTS Standard 3.1.2). He has also structured the lesson in a way that tries to make the learning objectives

clear to students and which engages them in purposeful ways to develop their understanding (QTS Standard 3.1.3).

Discussion

There is a growing literature that recognises the expert knowledge that teachers bring, in engendering students' learning for understanding rather than passive learning for recall of propositional knowledge (Loughran et al. 2003). Despite the recognition of the link between teaching and learning, teaching itself is often undervalued and other professionals often do not understand much of the knowledge on which teachers draw. The research community does not articulate or document this knowledge well, partly because this knowledge tends to be tacit in nature and it is often difficult to make this explicit.

Loughran et al. (2003) articulate a number of issues when attempting to document teachers' expertise. First, the problematic nature of seeing knowledge in practice; secondly, the working life of most teachers does not systematically include times for connecting with advances in the knowledge base of their own profession; thirdly, the social culture of teachers does not create an expectation to discuss practice in ways that demonstrate such knowledge; and finally, teachers do not necessary take their own knowledge seriously, leaving it untapped and known only to the beholder.

Cochran-Smith and Lytle (1999) argue that what is needed is clearer understanding about the definitions of knowledge and of how that knowledge may be expressed. Mitchell (1999) points to the problem of communicating research findings to teachers, as most teachers do not read academic journals. Conceptualising teacher-knowledge as having elements of craft, science and art, Mitchell refers to the apparent conflict between what beginning teachers are told at university and the teacher-culture that views teaching solely as a craft. He reports that teachers are suspicious of grounding practice in empirical research and he argues that what is missing in the literature is the craft knowledge needed to make academic knowledge

work and the classroom wisdom that is needed to make any intervention or change work. He argues that improving classroom practice requires both craft (i.e. practice-based knowledge) and science (i.e. research-based knowledge), but that the complexity of the classroom means that there are elements of art (i.e. natural flair) needed too. Some aspects of teaching are highly creative and cannot be taught in advance and Mitchell argues that there may be a fine line between lessons that are perceived as intriguing and inspiring and those perceived as boring and confusing.

There is an old adage that one never really learns something until one has to teach it. Through teaching whatever the concept or idea may be in question, one has to struggle to find out what the concept really means and how to deal with the questions and problems that are likely to arise. This 'struggle' is a necessary and important element in the work of teachers, especially at the lesson-planning stage. But understanding subject 'content' is only part of the story. Teachers need to transform subject content knowledge in a way that makes it interesting and comprehensible to their students and in a sense this is the 'bread and butter' of teaching. Much of this expert pedagogical subject knowledge that teachers possess is tacit and it is thus a challenge for teachers and researchers to make it explicit and consequently in a form that is transferable, so that other teachers may learn from their more experienced colleagues. The concept of an expert-teacher knowledge base is one that has not been fully articulated in the research literature and therefore one that warrants further research and investigation.

While consistent within a social constructivist framework, the concept of an expert teacher knowledge base does not imply a style or recommended approach to a teacher's repertoire of approaches. Rather it suggests optimism, in the sense that teachers can make a difference in the pace and progress of their students' learning.

For the business and economics teacher, the challenge is an interesting one since pupils' thinking is directly shaped by their experiences of business, and the economy, but only in so far as this experience has influenced their perceptions of the world. Pupils' learning is also shaped by the perceptions

they have developed as a result of their experience of learning. Good teaching is not simply a matter of 'building on' these prior perceptions because new ideas must be embedded in pupils' thinking if they are to become part of the way they see the world. This may require getting pupils to recognise the limitations of their current thinking. An example of this may be to get them to see business not just from the point of view of a consumer but also from the point of view of other stakeholders, thus enabling them to develop a different view that replaces what was there before. Teaching which does not *change* what students think is unlikely to have a lasting impact.

For me, the challenge is in getting beginning teachers to change *their* ways of thinking about teaching and learning. Beginning teachers come on the business and economics education PGCE with many preconceptions and experiences of learning. I believe that good teacher education is not just about building on these prior learning experiences but getting beginning teachers to recognise the limitations of their current thinking. An example of this may be to get beginning teachers to see the lesson from the point of view of pupils' learning outcomes rather than content which is to be covered. Teacher education which does not change what beginning teachers think is unlikely to have a lasting impact.

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Chapter 5: The Business and Economics Curriculum

Introduction

In Chapter 3 I argued that a secure subject knowledge base was a pre-requisite for creative teaching to be possible, and in Chapter 4 I explored notions of knowledge that are important to secondary school teachers. This chapter examines the shape of the business and economics curriculum and some of the reasons for it being as it is. It also looks in particular at the role of the government in influencing the character of the curriculum. This chapter adds to my theoretical arguments of the last two chapters which will inform the applied elements of the next three chapters.

'Curriculum' as a term is widely used but its meaning is nevertheless contestable. The Concise Oxford Dictionary (1990) defines a curriculum as 1. "The subjects that are studied or prescribed for study in a school" and 2. "Any programme of activities". In this narrow sense, a curriculum can be seen as a syllabus or in terms of what might be taught by a teacher. Stenhouse (1975), argued, however, that a curriculum should also embody a philosophy of education; a justification of what it is and what it tries to achieve. Stenhouse's wider definition of curriculum therefore includes what happens to students as a result of what teachers do and all the experiences for which the school should take responsibility. A curriculum may be designed or imposed by government agencies for many reasons. What is clear is that cultural influences, values and pedagogy have a profound impact on teaching and learning and so a curriculum should be seen as more than just a syllabus or a scheme of work. Moore (2000) argues that concerns about the extent to which the externally fixed curriculum and imposed educational policies may impede the development of what teachers perceive as good educational practice are very real and cannot be ignored.

Government education policy has influenced the development of the business and economics school curriculum in four main ways: first, in changes in school type (e.g. Grammar schools and Comprehensive schools); secondly, in defining a 'core curriculum'; thirdly, in the treatment of the academic/vocational divide and, finally, in the development of a qualifications framework. Whilst some aspects of Government policy have hindered the growth of business and economics in the curriculum, other aspects of government policy have been fundamental in developing the subject area.

The famous 'Ruskin Speech' by the then Prime Minister James Callaghan in 1976 may be seen as a turning point in educational policy. In his speech, Callaghan criticised the way in which education had become a 'secret garden' in which teachers and other educational professionals had freedom to decide what to teach and how to teach it. In 1976 there was no National Curriculum, no choice for parents who sent their children to state schools in England and no league tables. The speech opened up a public debate that helped generate a political climate in which it was seen as desirable for the government to take a proactive role in shaping what was to be taught in schools. In succeeding years the government increasingly assumed the right to determine on behalf of industry and parents what should happen in schools (Lawlor, 1990).

There are two political elements that have contributed to this trend. First, education has come to be viewed as one of a relatively small number of policy options in which government can exert an influence on national prosperity. Once policies of 'demand management' became discredited in the 1970s the attention of governments switched to ways of affecting the 'supply side' of the economy. Improving education came to be seen as a way of enhancing the supply of appropriately qualified workers. In the early 1980s it was high unemployment rates that injected a sense of urgency into government efforts to 'improve education'. From the 1990s it has been a belief that increased global competition means that British workers need to be highly educated to compete in the era of 'globalisation' (Hutton, 1996).

Secondly, the influence of 'neo-liberal' thinking has led many to doubt whether public servants, such as teachers in state schools, can be trusted to act in the best interests of those whose needs they are supposed to serve (Apple and Oliver, 1996). However, even strongly right-wing governments have not yet felt able to privatise state schools in the manner suggested by neo-liberal thinkers. Ironically, ideas that have been developed by right-wing thinkers have been used by governments as a justification for increasing government intervention in schooling. According to neo-liberal analysis this ought to make matters even worse as 'short-termism' prompted by the electoral cycle compounds the 'government failure' which would be anticipated from central government as much as local state schools.

Types of school

Different types of school typically offer different types of curriculum, and government policy can change the number of each type of school or introduce a new type of school. These changes may affect the number of students studying business and economics and the type of course students are likely to follow.

Prior to the introduction of comprehensive schools, students were divided at age eleven between grammar schools and secondary modern schools according to whether they had passed the 'eleven-plus' examination. (A few Educational Authorities in England have persisted with this segregated system of education.) Secondary Modern schools aimed to provide a vocational education and typically offered courses such as Commerce and Typewriting that were intended to equip young people, particularly girls, for routine clerical work. Grammar schools and independent schools were more likely to offer economics as an 'A' level subject, but were unlikely to offer any business studies courses (Davies, 1999).

With the introduction of Comprehensive schools it became more common to find schools offering 'A' level economics as well as Commerce and Typewriting. However, these subjects were often taught by different teachers, with very different status in schools. A division between teachers of economics and teachers of business studies has persisted to some degree in many schools despite the fact that separate training of teachers of economics was replaced by courses training for 'business and economics' and despite the Economics Association re-branding itself as the Economics and Business Education Association.

The publication of *14-19: opportunity and excellence* by the DfES in 2003 may be seen as a significant development in the 14-19 curriculum with major implications for teachers of business and economics. The Key Stage 4 statutory requirements of that publication are grouped in three categories: compulsory subjects; compulsory areas of learning; and entitlement areas. The compulsory subjects are English, ICT, mathematics and science. The compulsory areas of learning are careers education, citizenship, physical education, religious education, sex education and work-related learning. Entitlement areas (the arts and the humanities, design and technology and modern foreign languages) are not compulsory for students to study; rather they must be available should students wish to study these subjects. They must therefore be offered as options. Most of the changes came into force in September 2004.

Since 2002 the policy of encouraging secondary schools in England to become 'specialist colleges' has introduced a new status and a new set of opportunities for business and economics education. Although not included in the initial set of specialisms, 'Business and Enterprise' has become established as a fairly popular specialism for schools. By early 2004 there were 107 such colleges, with many more applications for Business and Enterprise specialist status in the pipeline. The characteristics required of schools bidding to become Business and Enterprise colleges are presented in Figure 4.1.

Figure 5.1 Key Characteristics of Business & Enterprise Colleges

1. They commit themselves to a four-year development plan with specific targets to improve their standards as a whole and to raise performance and participation in the specialist subjects.
2. They develop strong curriculum business links and develop teaching strengths in business studies, financial literacy and enterprise-related vocational programmes.
3. They have the support of the private sector, both financially and through the provision of advice and management support, including co-option of sponsor governors.
4. They emphasise the teaching of business studies, economics, statistics and information technology. It will be a requirement to offer an IT Vocational GCSE, and GCSE or 'A' level business studies.
5. They both utilise existing, and develop new, best practice techniques for raising educational standards, including setting targets of achievement for each student; the use of a longer school day and year; computer based learning; a wide provision of courses at 16; work experience, development of close links with local firms and high status of vocational education for all students.
6. They ensure that a significant number of other departments within the school take action specifically to develop pupils' economic literacy and skills relevant to the business world.
7. They seek to involve external partners in a range of activities to enhance 'vocational' understanding and skills.
8. They work with other schools, higher education e.g. City University and the wider community in sharing facilities and educational resources and undertaking joint ventures. They may be part of a collaborative arrangement organised by their local education authority.
9. They work closely with leading universities/business schools which provide a high level of advice and support, especially on curriculum development, ensuring it continues to reflect key skills needs of the business sector.
10. School governors and managers develop a strategic approach, focusing on curriculum, staff recruitment and development, and external partnership activity.

Specialist Schools Trust (2004)

It is not yet clear how these new specialist schools will interpret these requirements in practice. For example, what will count as an "emphasis on teaching business studies, economics, statistics and information technology"? How will these schools interpret the reference to economic literacy in point 6? The justification for some of these requirements is also not immediately obvious. For example, why are these schools required to offer a vocational course in ICT? Why must economic literacy be "relevant to the business world" rather than, say, to Citizenship education?

Nevertheless, the existence of Business and Enterprise Colleges enhances the status of the business and economics subject area and it encourages the development of curriculum innovations that would be unlikely to happen otherwise. A typical innovation has been the introduction of a business course in Key Stage 3. This does create some conflict with other parts of government policy. For example, providers of Initial Teacher Education for business education have been required to specialise their provision on Key Stages 4 and 5. In other words, they are not allowed to train teachers to teach the emerging courses in Key Stage 3 that have been encouraged by another arm of government policy.

A core curriculum

The idea of a 'core curriculum' to which all students are entitled precedes the National Curriculum; England had a core curriculum in 1904 which featured most of the subjects that became compulsory for all pupils in England by the Education Reform Act in 1988. The arguments for a statutory core curriculum had been strongly advanced by HMI in the 1980s (Lawton, 1996). One argument was philosophical in nature: education should be thought of as equipping young people for each of the areas of experience which make up adult life. Accordingly, pupils should not be permitted to specialise in their education to the extent that they missed out one of these areas by, for example, learning no science or no modern foreign language beyond the age of 14. A second argument was bureaucratic, for when children move from one school to another during their secondary years their education should not be disrupted by moving from one type of curriculum to another.

A third argument was sociological: despite the introduction of comprehensive schooling, researchers were able to show convincingly that the curriculum experienced by young people still varied significantly according to their social class background. In the case of business and

economics, middle class pupils were much more likely to study economics and working class students, chiefly girls, were much more likely to study office skills (Davies, 1999). Therefore, a common core curriculum could ensure that all pupils had the same curriculum opportunities regardless of their class background, and the narrowness of the National Curriculum in England actually enhanced the prospect of this becoming the case.

Croxford (2004, p1) reports that the breadth of the curriculum categories in Scotland's common core has allowed class differences in experience of the curriculum to be maintained, albeit at a reduced level: "Although the requirement to take scientific studies has reduced this gross inequality, there are still major differences between girls and boys of working-class and middle-class in the type of science course studied. Boys are more likely than girls to study physics, and less likely to study biology. Working-class pupils are more likely than middle-class pupils to take 'general' science".

Although economics was not included in the common core curriculum, other than in Scotland, politicians expressed a wish to see all students developing some economic understanding. For example, two years after the introduction of the National Curriculum Angela Rumbold, a Minister of State in the Department for Education, stated: "we would want 16 year-olds to have acquired some knowledge and understanding of basic economic ideas such as: the concept of the market and the potential roles of individuals, organisations and the state; how income and wealth are generated and distributed; how prices and wages are determined" (Rumbold, 1990, p.26). But it is difficult to see how this could be achieved if economics were not part of the National Curriculum. The answer was to designate 'economic understanding' as one of a number of 'cross-curricular themes' (NCC, 1990a, 1990b). These themes were to be delivered through the teaching of the timetabled National Curriculum subjects rather than to have separate timetabled periods of their own.

In principle this might have been an achievable aim. Development work in a number of subjects has shown how students can demonstrate a

measure of economic and industrial understanding or economic awareness in the context of mathematics (Scruton, 1989), geography (Davies, 1993a), history (Kerr, 1990), English (Clarke, 1992; Hickman, 1992), design and technology (Davies, 1993b) and modern foreign languages (Hodkinson, 1991). However, the success of embedding economic understanding depended on the readiness of teachers of National Curriculum subjects to reinterpret their subject in the light of the cross-curricular themes. In reality the problems with the assessment regime of the National Curriculum became more and more apparent (Lawton, 1996) and government commitment to cross-curricular themes was withdrawn as part of the scaling down of the demands of the National Curriculum initiated by the Dearing Review in 1993. As a result it is not surprising that Whitty *et al.* (1994) found that the cross-curricular theme 'economic and industrial understanding' had made a very limited impact on schools.

The effect of the National Curriculum on the number of students studying business studies in the 14-16 curriculum in England is clearly evident and well documented. The National Curriculum requirement for all 14 year-old students to study history, geography, a modern foreign language and design and technology was scheduled for implementation in 1991. In the late 1980s the number of students studying business studies as an examination subject in schools in England was rising rapidly (Davies, 1994), but this rise was abruptly halted and then gently reversed by the new National Curriculum requirements.

In 1992 GCSE examinations for 16 year-olds in business studies attracted 119,989 candidates but by 2001 this number had fallen to 105,194 (QCA, 2003). Ironically, the requirement to study geography *and* history was never implemented, being revised to a requirement to study history *or* geography. Subsequent relaxations of the regulations requiring the study of specified subjects in the curriculum for 14-16 year-olds have resulted in greater scope for schools to offer opportunities for students to study business studies or economics. The renewed government interest in

vocational and 'work-related' education may now stimulate demand for, and innovation in, business education in the compulsory curriculum.

The Academic/Vocational divide

The 1944 Education Act introduced a tripartite system of schooling in England, Wales and Northern Ireland which provided for 25% of secondary age pupils to attend Grammar Schools, 5% to attend Technical High Schools and 70% to attend Secondary Modern Schools. This division has provided the context for the academic/vocational divide in English education ever since. This division was based on an analysis of the type of skills required by the economy at that time, with grammar school education designed to equip young people for management, professional and scientific occupations and secondary modern education designed to prepare young people for largely semi- or unskilled jobs.

But the economy has changed a great deal since 1944: in 1950 the proportion of the workforce employed in manufacturing and primary industry was roughly 50% with 50% employed in the service industry. By 1980 the proportion employed in services had risen to 62% and by 1998 this figure was 75% (Hoskins, 2000).

However, these figures illustrate only one way in which the labour market has changed. In the 1990s Hutton (1996) suggested an alternative tripartite division in the labour market. Hutton suggested that 30% were economically disadvantaged, either unemployed or existing in marginal and temporary employment. He described a further 30% as 'insecure', either self-employed or working in jobs where the risk of redundancy was high. In the final 40% of 'advantaged' workers he included workers still covered by union wage agreements, full-time tenured employees working in the great organisations in the public and private sectors, and the full-time self-employed. Although millions of manufacturing jobs have gone, and millions of new service jobs have been created, there is still a big

divide between the 'haves' and 'have-nots' in the UK labour market. Academic subjects and the university degrees for which they provide entry credentials remain the major routes into the advantaged professions.

However, the rhetoric, at least, of government policy on the relationship between the curriculum and the labour market has changed a great deal since 1944. The current policy emphasis is in 'up-skilling' the whole workforce, as evidenced by a recent government circular:

*At degree level and above, the skills of the UK labour force match those anywhere in the world and we are making major advances in the educational standards achieved by school and college leavers. But the proportion of the workforce trained to intermediate level is half that of Germany; we have 50 per cent fewer people qualified to NVQ Level 2 or equivalent than either France or Germany; and there are shortages of some key technical skills. Most importantly, there are about 7 million adults in Britain who cannot read or write to the level we expect of an 11-year-old - making their everyday life a struggle and reducing our productivity and competitiveness as a nation.
(Department for Work and Pensions, 2004, paragraph 4.5).*

Yet there are still elements of the 'educational right' arguing for the return of a traditional and sharp academic/vocational divide. For example, on behalf of the Institute of Directors, Lea (2002) argues that beyond the age of 14 only 25% of students should follow an academic curriculum with a vocational curriculum provided for the 75% of students who are selected out of the academic route by failure to achieve high enough academic standards. This appears to be in contradiction of the Institute of Directors support for 'parity of esteem' between vocational and academic routes in school.

Against this background, three themes can be observed in the development of curriculum practice in England. First, 'less able pupils' (as reflected by progress in the academic curriculum) are more likely than their peers to follow a vocational curriculum after the age of 14. Consequently, vocational subjects have traditionally had lower status than academic subjects in secondary schools in England. This difference was pronounced in the mid-1980s. Economics was well established as one of

the most popular academic subjects in the A level curriculum, with a relatively small number of entries also at 'O' level. 'Business studies' was still a new title for examinations at 'O' level and 'A' level and it attracted few candidates. But there was a very well established tradition of 'commercial subjects' such as office practice, commerce and typewriting. These subjects were designed to equip students with the specific skills and knowledge required for clerical work. There was a marked gender bias at this time. Teachers and students of economics were more likely to be male, while teachers and students of commercial subjects were more likely to be female (Davies, 1999).

The variety of vocationally orientated business and commercial courses grew during the 1980s under the influence of a government initiative to promote technical and vocational education (TVEI). This initiative had encouraged groups of schools to design and implement innovative vocationally-orientated courses, often under the guidance of Local Education Authorities. However, the introduction of the GCSE examination in 1986 provided a catalyst for a radical change. The government body responsible for the new examination (SEAC, the body that was the forerunner of the Qualifications and Curriculum Agency) was keen to rationalize the array of examination titles that were on offer in the 1980s, and business studies emerged as the preferred title for courses.

There were two conceptualizations for the new 'business studies'. First, there was an academic version of the subject derived from the 'O' and 'A' level business studies syllabuses and the tradition of Business Awards offered by the Business and Technical Education Council (BTEC). Secondly, there was the 'business and office skills' alternative that had been developed by the commercial subjects tradition in schools. Davies (1999) argues that it was the 'business and office skills' version that was the more popular in schools. This was the kind of subject that teachers had been more used to teaching, and the business and information studies GCSE translated this tradition into an information technology environment. Williams and Yeomans (1994) and Jordan and Yeomans (1998) argued that the course provided a broad and flexible vocational preparation that

was not narrowly focused on preparation for a single occupation and they interpreted this as a new development in vocational education.

However, it was the academic version of the subject that triumphed through becoming embodied in the national GCSE criteria for the subject (Davies, 1999). In one sense one might view this simply as an outcome of the introduction of the GCSE examination in which the replacement of 'O' levels and CSEs privileged academic subjects. Alternatively one can interpret this triumph in terms of Goodson's (1983, 1985) account of the way in which school subjects develop. Business studies emerged from a coalition of different interest groups: teachers of commerce, typing, business studies and economics. To achieve a secure place in the curriculum it needed to establish an academic credibility and this ultimately determined which kind of business studies would become dominant in the curriculum (Davies, 1999).

This has left a residual problem for business studies as a subject. In establishing credibility as an 'academic subject' it is open to criticism that it is insufficiently practical as a vocational preparation. The introduction of a government initiative on enterprise education illustrates this point. A review of university courses including the word 'enterprise' quickly establishes that the word is being used to convey a particular approach to business studies at degree level. The major pre-existing use of the term enterprise in a school context in England has been the Young Enterprise scheme in which groups of sixth form students set up their own moneymaking businesses. The term 'enterprise' is being used in this context in association with the idea of an 'entrepreneur' as developed by the Austrian School of thought in economics. Yet the government's promotion of 'enterprise education' following the publication of the Davies (2002) Review presents enterprise education as something distinct from business education. In many senses this is extraordinary, for here is a subject in the curriculum which is required by government regulations to focus on developing students' understanding of how business operates yet it is not seen as central to developing students' capability to set up a business.

One explanation for this curious state of affairs is that the government wants all students to experience a minimum level of enterprise education, but a substantial minority of schools do not offer students a chance to study business studies at all. Despite these apparent contradictions, the inclusion of a vocational element in the core curriculum is a strong indicator of the way in which government policy has shifted away from promoting an academic/vocational divide.

The qualifications framework

Some governments do not provide regulatory frameworks for qualifications at all. In these cases, as in some Eastern European countries, it is usual for students to take examinations set by individual universities to determine their university entrance (Brant *et al.*, 2002). However, there are several benefits of a qualifications framework regulated by the government.

First, it is likely to be more efficient since fewer assessments need to be set. Secondly, it should enable a fair and transparent comparison between qualifications, making it more likely that individuals' progress will be judged on the basis of what they have achieved rather than the institution they attended. Thirdly, it provides a basis on which the performance of schools can be compared. This final reason has become increasingly important in England since the Education Reform Act of 1988 and the subsequent publication of league tables of school performance. Maintaining standards can prove difficult even in a highly regulated system. The qualifications system defines the boundaries in a subject area, influences the emphasis given to different educational aims and determines the way in which a subject is assessed.

Goodson's (1983, 1985) analysis emphasises the way in which subjects are alliances of different interest groups. This is evident in the range of

examination titles available in business and economics education. The commercial tradition created a close relationship between the teaching of business-related subjects and the development of ICT skills. This legacy is maintained by subjects such as 'business and communication systems' (AQA, 2004). At GCSE, the business and communications systems specification requires knowledge of, and ability to use, a range of communication systems in which ICT must be prominent. A teacher of this specification would require frequent access to ICT facilities. A teacher of the AQA GCSE business studies specification might choose to make significant use of ICT in their teaching, but this is not required by the specification aims. Nevertheless, even in the business studies specification there are 37 references to ICT. There is also a reference to enterprise in the aims of the business studies specification, and enterprise is suggested as a focus for coursework. There are no references to enterprise in the business and communications systems specification.

Another combination involving business studies has seen the subject combined with economics, first at 'A' level and then at GCSE level. One significance of this development is that it illustrates the way in which government policy on examination regulations has enabled experimentation in the development of the subject area. Business has been combined with information technology, communication systems and economics in GCSE specifications. Space and opportunity has been available for the development of different traditions within the subject area. It remains to be seen whether 'business and enterprise' will be developed as a GCSE option. Given the current government emphasis on enterprise and the introduction of specialist status for 'business and enterprise' colleges, it would appear to be a likely development.

Business studies and economics can contribute to a wide range of educational aims: from employability and enterprise capability to citizenship education. Between these 'academic' and 'vocational' poles in the subject area, business studies has established a position in which it is seen as 'academic' because it has a well established body of content knowledge and also 'vocational' because it is perceived as a preparation

for employment in business. However, this leaves the status of business studies in the curriculum still open to change as the qualifications framework is developed.

When business studies was establishing itself in the curriculum in the late 1980s the situation was straightforward. The 14-19 curriculum comprised GCSE qualifications for 14-16 year-olds and 'A' level qualifications for 16-19 year-olds. There were vocational business courses (such as the BTEC awards) principally offered by colleges of further education, but these were peripheral to the school curriculum at that time. However, the situation was far from stable and during the late 1980s and the 1990s schools engaged in a high rate of curriculum change in business and economics education. One reason for this rate of change was the rapid increase in the participation rate in 16-19 education. Although this increase was largely due to an increase in enrolments at 'A' level, schools also faced an opportunity to increase their sixth form size by enrolling students who had previously gone directly into employment or training schemes (Davies, 1999).

In the mid-1990s two curriculum reviews were undertaken by Sir Ron Dearing to try to create coherence in what was becoming a qualifications quagmire. This contributed to the development of a National Qualifications Framework with three levels of outcome that are relevant to school level. The first level (termed 'Foundation level') is pitched below GCSE level, the second ('Intermediate') level is GCSE or equivalent (being pitched at the level of roughly average achievement at age 16) and the third ('Advanced') level is the A level or equivalent. By establishing these three levels of achievement the National Qualifications Framework aims to separate particular levels of achievement from a specific age at which they are expected to be achieved. It also aims to provide a basis on which the 'standard' of academic and vocational qualifications can be directly compared.

Three routes were created: academic, general vocational and vocational. A further reform, 'Curriculum 2000', revised the definition of these three

routes in order to strengthen the equivalence in standards between the routes. This established a pattern of qualifications at advanced level of:

- Vocational and General Certificate of Education (VCE/ GCE) Advanced Subsidiary levels
- The GCE A2 leading to a full GCE A level
- The VCE A levels and A level (double awards)
- The new Key Skills Qualification.

'Performance Descriptions' were developed to specify what students had to do to reach a particular grade on each route. A comparison of the tables 5.2 and 5.3 (see Appendix 1) shows that the two routes have a great deal in common. The difference lies in the repeated reference to 'business skills' in the applied route. However, the language used in these performance criteria seems to suggest that students on the applied route will need to demonstrate these skills in addition to the knowledge, understanding, analysis and evaluation that is required for the academic route. According to Ofsted (2004b) the design of applied or vocational A levels was not good. Ofsted complain that the AVCE qualification was "neither seriously vocational nor consistently advanced" and was over assessed (paragraph 7). Ofsted also felt that "in some subjects, moreover, course specifications lack vocational content and are therefore too similar to GCE A level" (paragraph 7). Ofsted recommend that work experience be made a compulsory element of vocational A Levels. As twenty-five per cent of all entries for vocational A levels are in business, (Ofsted, 2004b), these criticisms are particularly relevant for the business and economics subject area.

Government regulation also frames the character of school subjects through assessment regulations. The key areas of regulation have been: specification of core content and assessment objectives, maximum allowance for coursework, the use of tiered papers and the use of synoptic assessment. Table 5.1 provides a summary of requirements in 2004.

Table 5.1 Assessment regulations for Business and Economics, 2004

Level	Subject	Coursework	Tiers	Other
A Level	Business	Maximum 30%	None	Synoptic assessment through decision-making exercise, case study, business plan or coursework
A level	Applied Business	66%	None	Single or Double award
A Level	Economics	Maximum 30%	None	Minimum of 20% synoptic assessment through extended case study or essay questions
GCSE	Business Studies	Maximum 25%	Foundation and Higher	
GCSE	Applied Business	66%	None	Coursework provided through portfolios (double award)
GCSE	Economics	Maximum 20%	Foundation and Higher	

The current pattern in specifications is that whilst coursework is required in business studies courses it is an option in economics courses. There seems no clear logic behind this difference. It reflects different traditions that have developed within the subject area. Likewise the synoptic requirement for business and economics at A level is not required at GCSE level and again it is not entirely clear why this should be so. Nonetheless, these assessment regulations, together with the scrutiny of examinations conducted by QCA, help to maintain comparable standards across examination boards. Even with this degree of regulation there are variations in standards between specifications (Davies et al., 2003). No doubt these would become greater without the degree of regulation currently provided.

Discussion

Governments affect the development of subject areas through their overall policy on schools and through direct intervention in shaping the curriculum. In England the government has had a profound effect on the development of business and economics education in the last twenty years. This effect begins with the organisation of schooling: the tri-partite system of grammar schools, technical schools and secondary modern schools entrenched an academic divide which fostered a complete separation between the teaching of economics and the teaching of commercial subjects that were later to be transformed into business studies. This system also created the context in which the designers of business studies as a school subject aimed to develop it in an academic mould.

In the 1980s the introduction of the National Curriculum and the exclusion of business and economics education created substantial problems for the development of the subject area. The growth of business studies as a GCSE subject was halted, an attempt to develop economic understanding as a cross-curricular theme dissolved in the government's streamlining of the National Curriculum, and the subject area became divorced from the educational development and resources that were poured into the implementation of the National Curriculum. So there are ample grounds for viewing government influence on business and economics education as an example of 'government failure'.

There are also reasons, however, for attributing the growth and development of the subject area to government policy. The past thirty years of government education policy can be viewed as an attempt to rid the system of the problems created by the grammar/secondary modern divide. The growth of comprehensive schooling and in particular the introduction of the GCSE examination aimed to break down the divisions that had been created. The growth of business studies was greatly stimulated by the introduction of the GCSE examination and this in turn has helped to bring the economics and commercial traditions in schooling much closer together. So much so that the 1990s saw the introduction of an economics and business joint 'A' level and a business and economics joint GCSE.

The work of the Qualifications and Curriculum Agency (and its predecessors) has also promoted curriculum development in the business and economics subject area, not least through the development of assessment objectives and grade criteria. These developments have clarified what students and teachers should be aiming to achieve. It is reasonable to argue that this clarification and the monitoring that has accompanied it have helped to raise the quality of work in the business and economics curriculum area. This is one explanation for the steady rise in the proportion of students gaining higher grades.

For Shulman (1986), curriculum knowledge is one of the 'tools of the trade' of teachers. Teachers should be familiar with the whole curriculum laid down for pupils, the programmes of study and the kinds of curriculum materials used to teach each subject that has been studied previously and that may be studied in the future. Business and economics teachers have a particularly challenging task in getting familiar with the breadth and depth of their subject area, the relationship with other subjects and the myriad of courses and options available for their students.

But there is also an opportunity for business and economics teachers to embed their subject in the school curriculum. There is an opportunity to teach business and economics concepts beyond the traditional business and economics subjects; for example in Citizenship education. There is also the statutory requirement for schools to have work-related learning and enterprise education on the curriculum and who better to offer their expertise than business and economics teachers?

The next chapter reports on research on the teaching of taxation which is an instance of the type of subject that has a number of different potential curriculum bases. Part of my argument is that business and economics teachers are likely to have the necessary expertise to teach this subject well and to do so they need to approach the teaching of it creatively if taxation is to be understood and enjoyed by the pupils concerned.

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Chapter 6: Teaching about Taxation

Introduction

Taxation is an area of the curriculum that many teachers report as 'boring to teach' and many pupils report as 'boring to learn' (evidenced by the primary research described later in this chapter). In terms of curriculum development and of exploring issues of creativity and subject knowledge, it is therefore a fruitful subject to research. Furthermore it is important in the context of financial literacy as previous research indicates that the level of financial literacy amongst school children in the UK is less than impressive (Davies *et al.*, 2002).

The aim of this chapter is to explore issues of creativity, subject knowledge and curriculum with regards to teaching difficult topics, taxation being the case in point. This chapter aims to exemplify some of the theoretical arguments that I offered with regards to creativity in chapters 3 and subject knowledge and knowledge transformation in chapter 4. Chapter 5 examined curriculum considerations pertaining to business and economics and what is evident is that teachers, operating in an environment of an over-crowded curriculum, must see the relevance and importance of taxation if they are to devote creative time and energy to planning and teaching about it. Business studies teachers should prepare their pupils for the demands of examinations and for them to do so adequately, they should teach about how taxes impact on business. Therefore, there is a clear need for business studies teachers to be knowledgeable about taxation matters.

Business Studies, however, is not the only curriculum subject that has taxation as a constituent element. Citizenship education has significant economic content which includes matters relating to taxation. However, Citizenship education teachers may not all possess the expertise to teach

about taxation in a knowledgeable and informed way and this does pose a barrier to this topic being taught well.

A 'Tax Pack' for schools

In January, 2002, I was approached by the Inland Revenue and asked to submit a tender for a research project that was to investigate teachers' needs and wants for resource materials to enhance the teaching of taxation at key stages 3 and 4.

The Institute of Education, University of London was awarded the research contract based on the blind tender that I submitted in February 2002. After being chosen as the 'preferred partner', I then revised the tender in March 2002 and then again in April 2002 following extensive discussions with the Inland Revenue about the exact requirements of the research. The fieldwork was undertaken between the end of April 2002 and mid-July 2002. I directed the research project but, given the magnitude of the undertaking and the ambitious time-scale, I needed assistance in undertaking the fieldwork and analysing the results.

In early February 2002, when I started preparing the tender, I approached Institute of Education colleagues, but at the time there was no one suitable who could take on additional responsibilities at short notice. I did manage to secure the help of two professional colleagues: Nancy Wall, Co-director of the Nuffield Economics and Business Project and Marion Thomas, Research and Development co-ordinator of the Cambridge Education Business Links Organisation. On the recommendation of the Inland Revenue, I also sub-contracted BMRB, a specialist market research company, to administer some of the research instruments.

The research aimed to define the scope of existing curriculum arrangements in relation to the teaching of taxation; to identify the information and resource needs of teachers; to identify through research

the levels of awareness of teachers and intermediaries about tax matters; to understand the role of intermediaries in the selection of appropriate teaching resources; and to identify the most efficient way of communicating the availability of a new set of teaching resources.

Business studies and Citizenship are two main areas of the secondary school curriculum that provide significant vehicles for developing pupils' understanding of taxation. Business subjects are popular at key stage 4¹, but they are optional and many pupils do not have the benefit of studying them (JCQ, 2005). While the subject of economics has content devoted to the teaching of taxation, it is not a popular subject at key stage 4² and is not taught at all as a discrete subject at key stage 3 (JCQ, 2005).

The research for the Inland Revenue, HM Customs & Excise and HM Treasury comprised three components. The first examined teachers' perspectives of taxation issues, the second examined intermediaries'³ perspectives and the third examined the views of teachers who had used an existing tax-pack. This third research element was carried out independently of the first two so as not to 'contaminate' results.

In this chapter, I only discuss the first research component: teachers' perspectives of taxation issues. I do not report on intermediaries' perspectives or on the research with existing tax-pack users as they are clearly beyond the scope of this thesis.

Research Methods

¹ In June 2004, examination entries were as follows: GCSE Business Studies 94,316; GCSE Business and Information Studies 33,646; Applied Business GCSE 17,340; GNVQ Intermediate Business 12,518 and GSCE Economics 3,694. This gives a total of 161,514 entries in comparison to subjects like Mathematics and English that account for almost three quarters of a million entries

² There were only 3,694 entries in June 2004.

³ Intermediaries include Government organisations, awarding bodies, subject associations and LEAs.

There were two elements to the research on teachers' perspectives. The first element was a quantitative study of 200 teachers who were interviewed by telephone; interviews took between ten and fifteen minutes with predominantly closed questions. The questionnaire was devised by myself (with 'tweaking' during review meetings with representatives from the Institute team, BMRB and the Inland Revenue, HM Customs & Excise and HM Treasury) and administered and moderated by BMRB Quantitative. The second element was a qualitative study using focus groups as the research instrument. The seven focus groups in various parts of the UK each consisted of approximately three teachers of Citizenship plus three business studies teachers and lasted for approximately one and a half hours. The focus group questions (topic guide) were devised by myself with help from my two Institute colleagues and were administered by BMRB Social.

Quantitative study of teachers' perspectives

I devised the first draft of the questionnaire and worked with my two colleagues in refining the draft to be in a presentable form for an external audience. I emailed the draft to BMRB and the Inland Revenue, HM Customs & Excise and HM Treasury and in subsequent meetings with BMRB at the Institute and BMRB and the Inland Revenue, HM Customs & Excise and HM Treasury at Somerset House, amendments were agreed.

There was tension between my recommendations for the most appropriate questionnaire design and the views of the Inland Revenue, HM Customs & Excise and HM Treasury. There were three broad areas of disagreement. Firstly, there were differences in our epistemological constructions of the nature of teaching and learning. It appeared that the commissioning officers of the Inland Revenue had a conceptualisation of teaching akin to a transmission of knowledge. They appeared uncomfortable with questions that explored teachers' wishes to pursue teaching approaches that were of an experiential nature. Secondly, I felt the Inland Revenue

wanted to ask too many leading questions that would have produced answers they wanted to receive, which I believe would have compromised the integrity of the research. Thirdly, the Inland Revenue wanted a multitude of questions probing teachers' understanding of, and willingness to teach about, very specific taxes. It was my view that these questions were unnecessary, for such specific taxes were not on any syllabus that teachers of any subject at key stages 3 and 4 were ever likely to teach. However, a final draft was finally agreed upon and then BMRB modified the questionnaire to make it suitable for a telephone survey and emailed it to me for approval, which I duly gave.

A telephone data collection was the chosen method as it produced faster results than a postal survey. While the cost of this data collection method is substantial, this was not a factor for me because the Inland Revenue agreed to pay all of BMRB's costs directly and the Inland Revenue made it clear that speed of data collection was of greater importance to them than cost. The survey was conducted by telephone between 24th April and 10th May 2002 in the BMRB Ealing Telephone Centre (see Appendix 2 for the questions asked).

The universe for the survey was business studies teachers and teachers responsible for the co-ordination of the new Citizenship curriculum within secondary schools in England. The sample of schools was drawn from the DfES Register of Educational Establishments in England. This is an up-to-date resource that ensures the same schools are not sampled for research purposes too frequently. A total of 200 teachers were interviewed: 105 Citizenship co-ordinators and 95 business studies teachers. Headteachers of schools identified as suitable for our research purposes were sent an opt-out letter in advance of the telephone call, for use if should they not wish to participate in the research. (See Appendix 3 for a sample of the letter.)

One teacher was interviewed per school. There were two introductions to the interview; one that prompted interviewers to ask for the head of business studies, and a second that prompted interviewers to ask for the

teacher responsible for co-ordinating Citizenship studies. Schools were randomly assigned one of the two introductions to ensure that interviews were achieved with a representative cross-section of schools in each case. Interviewers were briefed to ask for the second type of teacher only if there was no teacher available who fitted the original description.

The issued sample of schools was representative, having been selected at equal intervals from a stratified list of all secondary schools in England, using school type, region and size as the stratifiers. Quota controls were applied during fieldwork to ensure that the achieved sample was broadly representative of the sample profile. Success was achieved in obtaining interviews with virtually the same proportions of the various groups of the sample. Quota controls were set to ensure the sample was representative for the following factors: region; type of school; size; percentage eligible for school meals; and urban/rural factors.

Qualitative study of teachers' perspectives

In order to provide in-depth evidence from teachers' perspectives, a qualitative research element was carried out, employing the use of focus groups as the core method of data collection. Focus groups provided the opportunity to investigate the range and diversity of teachers' views and experiences in relation to teaching about taxation and personal finance. Exposing participants to the perspectives of others, within a group setting, helps to refine views and to stimulate discussion about a subject that may not have been a high priority for all present (Greenbaum, 1998). In the focus groups, therefore, teachers were given the opportunity to explore and reflect on their views about the teaching of taxation, and also to generate ideas and solutions regarding the nature of the materials and other resources required to help them undertake this teaching task.

As with the quantitative survey design, I took the lead in constructing a first draft, which was then developed by myself and my two colleagues before

being emailed to the Inland Revenue and BMRB for approval. All parties agreed this and I organised a pilot focus group that was held at the Institute of Education and administered by BMRB. As a result of the pilot, a few minor 'tweaks' were made to the topic guide.

A total of seven focus groups were carried out (including the pilot); five in England, one in Wales, and one in Scotland. For logistical reasons, it was not possible to hold a focus group in Northern Ireland and so five telephone in-depth interviews were carried out instead. These interviews were transcribed and analysed in a similar way to the focus groups. Each group discussion was designed, as far as possible within the scope of the research, to ensure the inclusion of teachers from varying backgrounds and experiences within the key stage 3 and/or 4 curriculum. A total of 46 teachers took part in the qualitative aspect of the research.

As is usual in qualitative research, samples are designed to ensure full coverage of the key sub-groups within the given population in order to identify and explain variations in the nature of experiences and views between them. The aim, therefore, is purposively to select a sample on the basis of a range of key characteristics identified as relevant to the given population, rather than to represent statistically the wider population (Fern, 2001).

The decision to involve teachers in focus groups, however, presented some concerns about whether I would be able to recruit the full range and diversity of teachers with an interest in, or connection with, financial literacy and personal taxation. It was recognised in our team discussions that there may be logistical and time pressures facing teachers, which may affect their willingness to take part in research (which requires them to attend a focus group) about a subject that may not be high amongst their priorities.

For this reason the Institute of Education team organised a number of local associates who knew and were in contact with teachers in each area and

could therefore more successfully carry out the recruitment. The regional organisers were briefed both orally and in writing (see Appendix 4) by myself, Nancy or Marion about the need to ensure diversity according to our outlined criteria. Working within these parameters meant that there was less opportunity for the research team to control the recruitment and composition of each of the groups and, as can be seen from the sample profile (Table 6.1), not all perspectives were comprehensively covered. Inevitably, the teachers who agreed to take part can be expected to be more positively disposed to the teaching of taxation and personal finance (a sample letter sent to these teachers is attached as Appendix 5) and the findings need to be interpreted with this in mind.

Table 6.1 Profile of Focus Group sample (including telephone sample conducted in Northern Ireland)

Characteristics	Participants
<i>Gender</i>	
Male	26
Female	20
<i>Teacher's main role</i>	
Business studies	22
Economics	12
Geography	1
History	1
Mathematics	3
IT	3
English	1
Special needs	1
Modern Studies	1
Careers Education	1
<i>Country</i>	
England	26
Scotland	6
Wales	9
Northern Ireland	5
Total	46

Qualitative research permits understanding from the respondents' perspective, using their terminology and language; thereby ensuring each issue is explored in a relevant and meaningful way (Fern, 2001). In order to achieve this all group discussions and (to a more limited degree) telephone interviews were exploratory and interactive in form so that questioning could be responsive to the experiences and circumstances of the individuals involved. They were based on a topic guide (Appendix 6), which outlined the key themes to be addressed and the specific issues for coverage within each.

While topic guides help to ensure systematic coverage of key points across focus groups and interviews, they can be used flexibly to allow issues of relevance to individual respondents to be covered in greater or lesser detail. The subject coverage was similar for the group discussions and the telephone interviews, although in the case of the latter there was greater opportunity to explore individual experiences in depth, but with the disadvantage, however, that the interviewees did not have the same opportunity to 'bounce around ideas' as in the focus group.

Following the experience of the first focus group, where it became apparent that teachers lacked awareness about the proposals for introducing the tax topic within the Citizenship education curriculum, a sheet was prepared to enable teachers to have an idea of the range of topics that was proposed for inclusion. This was given out to teachers about fifteen minutes into the focus group after initially exploring their spontaneous awareness and understanding. It enabled teachers to have something concrete to focus on when discussing how to teach these topics and the nature of the materials and other resources required.

All group discussions and telephone interviews were tape-recorded, with permission, and transcribed verbatim to allow detailed analysis. The focus groups were held in a college or community centre, each lasting approximately one and a half hours. The telephone interviews each lasted about twenty minutes. All the fieldwork was carried out during May 2002. A payment of £30 was given to each participant.

Analysis

I initially intended to pursue a grounded theory approach. A grounded theory is one that is inductively derived from the study of the phenomenon it represents (Strauss & Corbin, 1990). It is a theory that is developed through the collection of, and then the analysis of, those data. However, teachers' responses were straightforward and unambiguous and an iterative process of successive coding and recoding was unnecessary. Teachers' verbatim responses were simply categorised and examples of responses are offered later in this chapter.

Adopting this qualitative approach made it possible to report in depth on a range of teachers' views and experiences. These also provide an insight into teachers' thinking about their teaching approaches and the kinds of resources they would like in order to teach about taxation effectively. However, given the relatively small sample and the purposeful nature of the sample design, I make no claims about the generalisability of the findings. Nevertheless, triangulating these findings with the quantitative research provided me with useful results that I report below.

Research findings

Teachers' perceptions of their pupils' knowledge of taxation topics

In this section, I draw predominantly from the focus group research. Teachers reported that most young people have only a limited understanding of taxation topics. This was felt to be particularly true of pupils at key stage 3. For example, one teacher expressed:

If you were to speak to one of our key stage 3 pupils, and ask them what tax was, or how much VAT you paid, they'd look at you blank and say, 'what are you talking about?' They wouldn't know. (Citizenship teacher)

Current courses in Business Studies and Personal, Social and Health Education enhance the knowledge and understanding of some pupils at key stage 4, but teachers still believe that knowledge and understanding in Year 10 is rudimentary. Another teacher stated:

It's just money that's been taken away for no good purpose really ... I think that is how they see it, not linking it with anything else. Certainly not linking it with services. (Business Studies/ICT teacher)

More specifically, in respect of pupils' knowledge, teachers felt that most Year 10 pupils are aware of the existence of Income Tax. However, teachers reported that pupils seem to have little knowledge of the rates of taxation on income and some have little understanding of mechanisms, including the fact that Income Tax is compulsory. Some teachers reported that their pupils voiced a sense of shock on discovering that Income Tax and National Insurance are compulsory. For example:

We looked at job adverts, and how much these people were getting, and they were quite shocked to think that was actually not how much they're going to get. That you have to deduct NI, tax and possibly pension. They were [saying] 'Well they can't just do that!' (Business Studies teacher)

The research reported in Davies *et al.* (2002) indicates that of 1000 14-18 year olds surveyed, 74% believed everyone should pay less tax; 51% disagreed with the statement that high earners should pay more tax than low earners; only 19% agreed that high earners should pay more tax than they currently pay. This shows a widespread lack of knowledge about the progressive nature of taxation. 72% thought they themselves paid no tax at all thus showing an ignorance of VAT. Awareness of VAT amongst school pupils at key stages 3 and 4 was believed to be similarly sketchy - it was felt that few pupils are aware of VAT and even fewer have any knowledge and understanding of rates (business rates) and Council Tax. (Davies *et al.*, 2002).

One can see considerable agreement between the findings of the Davies *et al.* research with pupils and my findings from the focus group research. However, the teachers in my research expressed the view that there are certain areas of taxation of which pupils are indeed aware. For example, duties on cigarettes are something that pupils who smoke know about because price rises that occur because of increased duties actually affect the pupils directly. Personal experience also leads pupils in Year 11 to develop some awareness and some understanding of National Insurance, since young people are issued with their NI numbers and cards at some point during this school year. Similarly, young people tend, at this stage, to take up part time employment and thus develop an awareness of Income Tax.

I think the smokers in the school realise their cigarettes cost more because of taxation, because they are obviously affected by it, and year 11s are starting to get the idea because they are starting to think about their NI card, 'what is that that's come through the post for me?' ... But even then, ignorance is still quite deep. (Business Studies teacher)

It remains true to say, though, that teachers believed that pupils' knowledge, even in these circumstances, does not extend very far and that pupils' understanding could be described as being some way short of complete comprehension. The acquisition of information about taxation topics in school is limited for reasons that will be examined in a later section in this chapter. Teachers feel that pupils may be able to gain some information about taxation topics in the home, from parents and carers. Nevertheless, teachers felt that the information to be gained by pupils in this way was likely to be poor and also negative. The teachers argued that pupils gain impressions of taxation that do not include the benefits that society derives from tax revenues and it was suggested that pupils were likely to gain knowledge about tax avoidance from parents and carers who made trips to continental Europe to buy alcohol and tobacco.

Whilst teachers felt that pupils do gain information from the home, as described above, they also expressed the view that some pupils are protected from financial information by their parents or carers. This belief is founded upon two premises: firstly, it is felt that 'money matters' are things that are not discussed in the home; secondly, parents and carers try to ensure that young people do not have to concern themselves too closely with money matters by assisting them with any financial demands that might be made on them.

In addition to information about tax topics that is gained in school or from parents or carers, teachers also felt that pupils are likely to gain information from television programmes. Such programmes include those that deal with these matters as they affect the lives of characters in, say, 'soaps', and also consumer programmes that take more direct approaches to financial matters.

In summary, the general view of teachers was that most young people have only a limited understanding of taxation topics. Teachers believed that knowledge of taxation topics does improve a little as pupils become older, partly due to some teaching in school and partly due to the increasing relevance of some taxation topics to the young people's own lives.

Teachers' personal confidence about their ability to teach taxation topics

Teachers' levels of confidence about their ability to teach tax-related topics was shown by the quantitative research (telephone interview) to be relatively high, but there were differences between business studies teachers' and Citizenship teachers' responses. More business studies teachers felt confident about teaching about specific taxes (92% of business studies teachers felt confident or very confident about this compared with 67% of Citizenship teachers), while more Citizenship teachers (80%) felt confident about discussing the ethical and moral

dimensions of paying taxes compared with business studies teachers (73%).

The range of tax-related topics suggested to the respondents was:

- Difference between direct and indirect tax
- Different types of taxes
- Link between taxes and government spending
- Moral and ethical reason for paying taxes
- Effect of taxation on income levels
- Amount of tax collected on earnings
- Impact of taxes on business (business studies teachers only).

The highest levels of confidence reported were those of business studies teachers in relation to the teaching about the impact of tax on business, with 90% of teachers very confident or quite confident to do so. Across the range of other taxation topics listed above there was no case in which more than 30% of teachers felt less than 'very confident' or 'quite confident'.

The lowest confidence levels were in respect of teaching about the amount of tax collected on earnings - 27% of teachers were 'not very' / 'not at all confident' teaching about the effect of taxation on income levels - 23% of teachers were 'not very' / 'not at all confident' about teaching the topic. With regard to teaching about the link between tax and government spending - 23% of teachers were 'not very' / 'not at all confident'. The moral and ethical reasons for paying tax is a topic about which 20% of teachers felt 'not very' / 'not at all confident'. The difference between direct and indirect tax and the different types of taxes are topics about which 18% of teachers felt 'not very' / 'not at all confident'.

The impact of taxes on business is a topic about which 4% of business studies teachers felt 'not very' / 'not at all confident'. 3-4% of all teachers are unable to gauge their level of confidence about teaching taxation

topics. 1% of Business Studies teachers are unable to gauge their level of confidence about teaching the impact of tax on business.

These responses suggest that teachers are much less confident of their ability to teach taxation topics that require specialist or up-to-date knowledge in circumstances where their own specialist knowledge does not touch on taxation matters. The levels of confidence reported by business studies teachers can be seen to underline this conclusion, as can the levels of confidence reported by all teachers in respect of more general knowledge about taxation.

This conclusion is triangulated by responses from the focus groups. Teachers regarded a lack of knowledge and therefore a lack of confidence on their part as being a significant obstacle to the teaching of tax matters. Whilst it is of course normal for teachers trained to teach business studies (or economics) to teach business, teachers of Citizenship will have been trained in a broad spectrum of different disciplines.

Further support for this conclusion can be elicited from the responses to questions about teachers' knowledge of specific taxes. Whilst between 80% and 90% of teachers feel knowledgeable about Income Tax, National Insurance and VAT there are, even so, between 11% and 21% who are 'not very' / 'not at all knowledgeable' about these topics. Further, 43% of respondents were either 'not very' or 'not at all knowledgeable' about Excise Duties or could not assess their own level of knowledge, 54% lacked knowledge about business taxes, 65% lacked knowledge about Environmental Taxes and 72% lacked knowledge of Tax Credits.

In summary, teachers' level of confidence in teaching about general tax matters is relatively high. Teachers' level of confidence in teaching about more specific tax matters, however, including details of individual taxes/credits etc. is markedly less buoyant.

The findings in the above section appear to be significant with regards my research themes of subject knowledge and creativity. The evidence

suggests that teachers are confident about general tax matters and thus possess the subject knowledge to teach about taxation effectively. The research reveals that teachers are less confident about teaching about specifics such as tax credits (these questions were asked at the insistence of the Inland Revenue), but as these specifics are not on examination specifications, they are not necessarily significant in practice.

The requirements and preferred methods of classroom teaching of teachers in educating pupils about tax

Teachers' present practices relating to taxation topics

Whilst there is a general belief amongst teachers that taxation topics are not widely taught to pupils in key stages 3 and 4, it emerged from the qualitative study that there is some coverage in a number of schools. The teaching is not detailed and is piecemeal in the sense that it may be taught in one or more of a range of subjects. Coverage of this type, such as it is, is directed at pupils in Years 10 and 11 and hardly ever at pupils in Years 7, 8 or 9.

Pupils who take business studies or economics as one of their key stage 4 options usually receive some education in taxation topics⁴. This, however, constitutes only a proportion of the pupils in any cohort, given the nature of the option system. The nature of the coverage in business studies is uneven - teachers' coverage of tax topics varies a good deal, depending on the teacher's view of its relative importance in the syllabus. (This came out clearly in the focus group discussions.) Further, the introduction of any material concerned with taxation is dependent upon the specification prescribed by individual awarding bodies. One teacher, for example, reported that the GCSE examination specification followed does include income tax, indirect and direct taxes, national insurance, national minimum

⁴ Business Studies and Economics typically account for over 160,000 key stage 4 examination entries every year.

wage, corporation tax and duties, whilst others asserted that curriculum coverage was minimal.

Other pupils undoubtedly receive education in taxation topics in PSHE, mathematics or ICT. In the schools where this occurs it is likely that all pupils in the relevant key stage receive this type of education since these three subject areas will be part of all pupils' curriculum. However, the extent of coverage is likely to be limited, even in those schools that include taxation topics in any, or all, of the three subject areas mentioned above.

In most schools, coverage of taxation topics in PSHE is likely to be undertaken by form tutors who do not necessarily have any particular expertise in this area. In some schools, however, teachers undertake the teaching of finance units in the PSHE programme with some expertise in the area, and this 'expert' group is likely to be made up of either business studies or economics teachers.

Requirements of materials for teaching taxation

Teachers expressed very specific preferences as to the nature of materials for teaching taxation. They want engaging resources, with full information provided, in an up-to-date form and accessible to all abilities.

The teachers felt that a resource pack on taxation must include background information to help them in their teaching, together with a comprehensive range of materials for pupils that could include booklets, videos, and various computer or paper-based games. Many teachers mentioned the desirability of simulations. There was a substantial measure of agreement across all the people surveyed that resources need to employ active learning strategies and must be seen by pupils as being relevant.

There were some differences of opinion as to the desired teaching styles to be provided for. Teachers who had a fairly traditional teaching and learning style ('I tell them...') often expressed a wish for work sheets. Many others took the view that, especially in the area of Citizenship, teaching materials should utilise the range of interactive, multi-media resources that are available and be active and pupil-oriented.

Teachers suggested development of the case study approach through which pupils could identify with the experience of well-drawn characters with whom they could empathise. This would allow comparisons to be made between people in different circumstances, experiencing levels of taxation in different ways.

The Red Box

The ultimate product of my research of teachers' needs and wants was 'The Red Box', an education resource pack that was designed to assist in the teaching of taxation in Citizenship and PSHE lessons at key stages 3 and 4. I stress, however, that I had no input in the production or development of this teaching resource pack.

The Red Box is a cardboard replica of the Chancellor of Exchequer's famous briefcase. It contains a 48 page printed booklet, a 21 minute video and two posters for classroom display and the resources are supported by a website: www.redbox.gov.uk.

The booklet includes photocopiable black-and-white worksheets and accompanying teacher's notes which are grouped according to age (for use at Key Stage 3 and Key Stage 4) which cover four topic areas: public spending, taxation methods, taxation & spending and the shadow economy. In addition there are four case studies which give either real-life examples or scenarios which thus develop human interest and empathy to make the materials more relevant to the lives of pupils.

The video tells the story of Jack, a typical 15-year-old lad, and offers East-Enders-like empathy for the viewers. The video is in four parts which correspond to the worksheets in the booklet. The web site invites the visitor to take on management of 'The Square'. Through answering correct questions, the players gain money to maintain and develop public services. This game might appeal to the younger age-range of intended users but it is too simplistic for use at Key Stage 4.

The depth coverage of The Red Box is basic and clearly not challenging enough for use with a business studies or economics class. However, as a resource for a non-specialist (in financial matters) it is appropriate for covering financial and ethical issues pertaining to taxation. I now offer an example.

Activity sheet 14 is about 'The cost of fixing a roof'. The reader is given a scenario of a lady, Mrs. Kingston, who has a leaking roof and a friend recommends to her a builder who works 'cash in hand'. By paying in this manner, Mrs. Kingston 'saves' £87.50 on her bill by avoiding VAT. A number of pertinent questions are then asked. Was the builder breaking the law? What taxes was he failing to pay? Was Mrs. Kingston depriving other people in any way? Does the amount of money involved make a difference to the rights and wrongs of the situation? A group work activity is then suggested. The scenario is a courtroom scene where Mrs. Kingston's builder is on trial for tax evasion and fraud. Pupils are asked to write notes in the builder's defence as if they are his lawyer; write notes as if from the lawyer prosecuting him; to think about what Mrs. Kingston might say in the builder's defence if she was called as a witness and finally to decide if the builder is guilty and if so how he is to be punished.

'Educational Communications', the commercial developers of the Red Box, have produced a resource for teaching about taxation that, in my professional opinion, partially meets the requirements of Citizenship teachers as expressed in my research report to the Inland Revenue, HM Customs and HM Treasury. The resources are certainly easy to use for teachers and attractive to pupils and so meet the expectations of teachers

who want an 'off the peg' lesson. For those teachers who want to engage with their pupils in a deeper manner, then substantial additional lesson planning is required.

For example, looking at Activity sheet 14, while this could be used as a simple worksheet and followed verbatim by a teacher, a creative teacher could use the scenario as an inspiration for a more interactive lesson. Briefing sheets could be devised for pupils and the lesson could take the form of a High Court trial with a judge, prosecutor, defendants and witnesses. Pupils not directly involved could play the role of the jury. The debrief that follows the court case could then be used for the teacher to unpick the moral and ethical issues that unfolded in the trial.

Knowledge Transformation, Creativity and Curriculum

In chapter 4, I explored issues of knowledge and teaching. In addition to having a secure knowledge of the subject domain, teachers need expertise in pedagogical knowledge if they are to successfully transform content knowledge into a form accessible to pupils (Shulman, 1986a, 1986b). It is evident from the qualitative data explored in this chapter that teachers believe that pupils find taxation 'boring' and lacking in relevance to their own lives. Therefore teachers have a challenging role in making taxation an exciting topic that is evidently relevant to the lives of their pupils.

Tickle (2000), as I noted in chapter 4, suggested that, in the light of lack of subject knowledge expertise, teachers may feel a sense of inadequacy, self-doubt and guilt and seek to develop coping strategies for compliance with curriculum content requirements. In such a situation, they may resort to using photocopiable materials in an uninteresting and unchallenging way. However, teachers may acknowledge their deficiencies and embark on a learning agenda that seeks to secure greater knowledge and expertise. In this scenario, teachers may well use available materials as an inspiration to produce bespoke resources for the needs of their pupils

and in the lessons, engage with those pupils to make them see the relevance and importance of, in this case, taxation.

In chapter 4 I also described Wood's (1996) categorisation of beginning teachers' conceptualisation of teaching: as imparting knowledge, as preparing pupils to use knowledge, as providing opportunities for pupils to see the existence of different perspectives on a phenomenon and as preparing pupils to be reflective. A teacher's philosophy of teaching is clearly important in how he or she will approach his or her teaching. Teachers who perceive teaching as 'imparting knowledge' will be more inclined to use 'off-the-peg' resources than teachers who conceptualise teaching in a deeper way.

The literature reviewed in chapter 3 (for example Csikszentmihalyi, 1996) also supports the argument that for teachers to teach about taxation effectively they need to possess a substantial degree of subject expertise in this subject domain. The quantitative research explored in this chapter suggests that business studies teachers who currently teach about taxation issues already possess such a degree of expertise, but are perhaps held back by other barriers. One such barrier is the lack of readily available and up-to-date quality resources, and it is in my opinion a pity that the Inland Revenue did not fund the production of such materials for use in the teaching of business studies and economics.

And what might such materials look like? In one of my discussions with the Inland Revenue, I suggested that they fund the development of a computer simulation; a virtual world where players develop a town with various amenities and public services being paid for by local taxes. I suggested that there might be easier and more complex versions and that there could be individual, business and overview perspectives. A national competition promoted at school level might well stimulate the teaching of taxation in a more comprehensive way.

Another barrier to the teaching of taxation is the problem of an overcrowded curriculum which tends to dissuade teachers from spending a

great deal of time on this topic. Curriculum issues were examined in chapter 5. For Shulman (1986b), curriculum knowledge is one of the 'tools of the trade' of teachers, and teachers should be familiar with the whole curriculum laid down for pupils, the programmes of study and the kinds of curriculum materials used to teach each subject (not just the teacher's own specialist subject). If schools are to enhance the level of financial literacy of their pupils, such knowledge is clearly essential for the school's curriculum planners. While a proportion of pupils study either business studies or economics, not all will have the opportunity to do so. The research reported in this chapter identified Citizenship as a potential vehicle for enhancing pupils' financial literacy. There is a difficulty, however, in that most Citizenship co-coordinators are unlikely to have financial expertise and this could lead to the problem of non-specialists attempting to teach a subject with which they lack familiarity. I welcome the production of the Red Box which provides appropriate resources for the teacher who lacks specialism in teaching about financial matters.

My research demonstrates that teachers are articulate about their abilities and limitations with regard to teaching about taxation. What has also been uncovered by this research is a tension, described in chapter 3, between the forces of entropy and creativity. On the one hand, teachers expressed a desire to have available resources that are easy to use, for example, photocopyable worksheets; such resources may encourage an uncritical, didactic teaching approach. On the other, teachers wanted to engage in the 'bigger issues' and to teach them in an engaging and challenging way (evidenced by some of the qualitative research). Such an approach requires a teacher to invest considerable time, planning and expert knowledge.

What I have learned from the Inland Revenue research project

The research project that I directed and that I have reported on in this chapter was time-consuming and challenging, but ultimately rewarding.

Because of its scale and extent and the very tight time-scale in which to complete it, it demanded of me all the research skills that I had learned on the EdD.

The research methodology was necessarily eclectic. The Inland Revenue demanded that the research be substantial, representative and inclusive of Scotland, Wales, Northern Ireland and the English provinces. In return they offered me a substantial budget⁵ with speed of research taking priority over cost. I had to be careful that my research design met these requirements. My research methods included both quantitative and qualitative components so that results could be triangulated and so that there was both high validity and reliability in the outcomes.

With regards the quantitative element of the research, in my initial tender, I proposed sending out two hundred questionnaires, with the hope of receiving about forty responses. I believed this to be sufficient to get a 'feel' of what teachers wanted of resources to teach about taxation and this would be followed-up with a focus group to understand better teachers' needs. However, the Inland Revenue wished to receive some two hundred responses for they wanted the research to be seen to be broad-scale and representative of the variety of children that would be taught. They suggested that the research could be done by telephone, but I was sceptical that such an approach would work; I offered my opinion that teachers are busy in their classrooms and notoriously difficult to track down during school time. I strongly recommended a paper-based survey sent by first-class post. However, co-working with BMRB proved me wrong for the telephone survey proved efficient and successful in delivering the required number of responses. Furthermore, BMRB's computerised system, using DfES data on school intakes, ensured a representative sample⁶. The co-operative nature of the research developed my understanding of sampling and broadened my knowledge of approaches to quantitative data collection.

⁵ The total cost of the research project was approximately £70,000

⁶ Representative in terms of urban and rural mix and numbers of children receiving school meals

My original tender included the use of one focus group as part of the qualitative element of the research. The Inland Revenue wanted ten. However, a subsequent costing would have put the project beyond their budget and consequently the Inland Revenue and I agreed on seven focus groups taking place. I initially wanted to run the South of England focus groups myself, with my two Institute colleagues taking on the remainder. BMRB were not agreeable to this, arguing that there might result issues around the moderation of results and the danger of me or my colleagues 'polluting' the outcomes by asking too many leading questions. We agreed that BMRB would run the focus groups using my devised topic guide. After piloting in London, we agreed to minor amendments and BMRB conducted the remaining focus group sessions and emailing me the transcripts. From this experience I further developed my understanding of qualitative research. I nevertheless feel that in terms of 'fitness-for-purpose' my original proposals would have sufficed. The purpose of this research was after all to illuminate teachers' needs rather than to have strictly reliable⁷ outcomes.

In hindsight I was naïve in thinking that the Inland Revenue would entrust my Institute of Education team just to get on with the research to the time-frame agreed and simply wait for the various interim reports at the agreed dates. Monitoring of my work was frequent, both by email and telephone and I perceived a feeling that the Inland Revenue was working to a number of political agendas. My contact at the Revenue who commissioned the research frequently agreed matters with me only to come back to me with alternative ideas; it was clear to me that her superiors had preconceived ideas of they wanted from the Tax Pack. I had a strong impression, although never communicated to me explicitly, that they wanted 'teacher-proof' materials that would portray the Inland Revenue, Customs and Excise and HM Treasury in a very positive light. They also appeared to subscribe to a pedagogy akin to a transmission of knowledge. Questions that I devised that might enquire about a more interactive style of teaching or that explored issues of controversy did not meet with favour. On a number of occasions I felt uncomfortable with suggested amendments

⁷ In a research meaning

which I believed would have led to leading questions being asked which could have compromised the integrity of the research. I certainly learned a lesson of political diplomacy.

One of the most pleasant outcomes of the project was being invited to 11 Downing Street for the launch of the Red Box. Whilst Gordon Brown did not attend in person, I met a number of senior politicians and senior Inland Revenue civil servants. I also got to meet the writer of the Red Box resource pack. I was shocked to learn that she had not received my report in full; rather she was 'drip-fed' directives from the Inland Revenue. She told me that she had to do a number of re-writes before the Inland Revenue were happy with her work as her original resources were deemed too controversial. This knowledge disturbs me, for while the Inland Revenue were publicly commissioning an independent research project that led to curriculum materials, they appeared in private to have preconceived notions of what they wanted in their Tax Pack. Putting my concerns into perspective, however, the resources that were produced in the Red Box are good teaching resources for Citizenship teachers and it is also clear that many of the recommendations that I had made in my report were acted upon.

In chapter 3 I discussed the tension between the forces of entropy and the forces of creativity. Putting this another way, what some teachers want, namely easy-to-use photocopiable worksheets, is not necessarily what is best for pupils. Some teachers put their pragmatic needs of coping with the demands of teaching unfamiliar topics ahead of creating exciting and challenging lessons on taxation. I was, perhaps, naïve or idealistic to have thought otherwise.

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Chapter 7: Developing beginning teachers' subject knowledge and creativity through fieldwork activity

Rationale

This chapter has two discrete objectives. The first is to examine fieldwork as a way of developing subject knowledge and creativity in beginning teachers of business and economics. To do this, the chapter exemplifies the theoretical explorations of Chapters 3, 4 and 5; fieldwork is seen as one element of the business and economics education PGCE that seeks to develop the necessary attributes of future teachers of the business education curriculum.

The second objective is to tell a story of professional development: my journey from teacher to teacher educator. The professional element of the EdD allows me to scrutinise my own professional practice and to situate my research in my own work. In this chapter I offer a conceptualisation of teaching which goes beyond the craft model (see Huberman, 1983).

Background

I first organised fieldwork in 1994: in Poland for my Year 12 business studies and economics students at a West London Secondary school. The original idea was not mine. Some of my students who also studied advanced level geography asked me if it might be possible to do fieldwork in business, and a timely mail-shot from European Study Tours, a specialist educational travel agency, gave me the idea of organising a trip to Warsaw. The brochure promised to do all the 'hard work' in organising the trip, by arranging travel, hotel and the individual visits. Preparations began in October 1993; on the one hand meeting with European Study Tours to organise a bespoke trip and to agree a price and on the other

hand writing to parents to gain their approval and also obtaining written approval from my headteacher.

The fieldwork took place during the May half-term in 1994; I and three junior colleagues travelled by coach from London to Warsaw with 36 Year 12 students. Individual visits included the FSO¹ car plant, a printing house, the Warsaw Stock Exchange, the Warsaw Chamber of Commerce and a brewery. Visiting Poland at that time in history was fascinating, for the country was still in transition from a command economy to a capitalist one. It proved to be a powerful and profound experience for the students. The students gained in developing their own subject knowledge and by being exposed to a different cultural experience.

Reflecting later, my colleagues and I considered the trip a great success: the students were impeccably behaved, the individual visits were interesting and relevant to the Awarding Bodies' subject specifications, and furthermore, there was a wealth of experience to draw upon in subsequent business studies and economics lessons. Subsequent field work visits to Warsaw and Krakow with other Year 12 students proved equally successful.

My higher education career started at the Institute of Education in September 1996 and the then subject leader for business and economics education asked me to organise fieldwork for beginning teachers. I readily agreed and once again used European Study Tours to make the logistical arrangements. Everyone enjoyed the experience and all the participants deemed the trip a great success. However, in retrospect I can see that I had not considered the purpose of the fieldwork sufficiently and I am not convinced that the participants learned enough on the trip with regards to developing their teaching expertise. I now believe that my first fieldwork with beginning teachers was pedagogically under-conceptualised.

Was my aim to run an exemplary fieldwork experience that the beginning teachers could copy and model? Certainly to an extent, and the beginning

¹ FSO is the state-owned Polish car maker which makes the Polonez model available in the UK

teachers experienced a well-organised trip that could indeed be modelled. Follow-up sessions at the Institute looked at fieldwork organisation and reporting, and at accounts of the trip. Was the aim to develop subject expertise? Certainly to an extent, and the various individual trips would have consolidated the student teachers' knowledge base. I now believe, however, there was insufficient information about the trips beforehand and too little follow-up later. Was the aim to develop pedagogical expertise? This is something that I had not considered as a possible aim of the fieldwork and in retrospect this was a serious oversight and omission.

In subsequent years I co-operated with the geography educators at the Institute of Education and ran joint business & economics education and geography education trips. I learned much from the geographers' approaches to fieldwork and their different conceptualisations and models of fieldwork, and this helped me to improve the learning experiences for my business and economics beginning teachers.

In particular, I sought ways to develop beginning teachers' subject knowledge and furthermore to develop a critical way of considering pedagogical factors. What became a feature of the trips were focused plenary sessions in the evenings where geographers worked collaboratively with business and economics beginning teachers to uncover areas of commonality between the subject areas and to illuminate common issues.

The collaborative working during plenary sessions proved to be particularly effective, with issues of pedagogy, curriculum and subject knowledge being explored in depth. Beginning teachers first worked in pairs in their own subject area to identify curriculum areas, problems and issues that they might explore in the future with their own students. The beginning teachers then worked in cross-curricular groups to explore commonalities and differences between their disciplines' approaches. What became apparent were the many similarities between the subjects and the similarity of the issues being discussed. What differed were the

methodological approaches of the different disciplines and the potential solutions to the articulated problems and issues.

One by-product of the plenary sessions was the creative output of the beginning teachers. It was rewarding for me to see the beginning teachers generate so many fruitful ideas in their lesson planning activities. One particular feature was how enabling it was for beginning teachers and how productive collaborative working proved to be. This sits comfortably with Csikszentmihalyi's (1996) ideas, explored in Chapter 3, that creativity is a feature of the interaction between a person's thoughts and the socio-cultural context and that creativity is a systemic rather than an individual phenomenon. The evening plenary sessions with the beginning teachers participating in structured group work can thus be described as creativity-enablers.

Up until three and a half years ago, the fieldwork took place in the May half-term, towards the end of the PGCE course. The fieldwork gave a strong focal point to the end of the academic year and proved to be a motivating factor for beginning teachers who had finished their final (second) practical teaching experience.

However, two factors persuaded me to offer the fieldwork earlier in the academic year. One was feedback that I gathered from the beginning teachers. The beginning teachers told me that they would value the fieldwork earlier in the PGCE and two strong arguments emerged. First, during the time abroad they 'bonded' with their colleagues and made strong friendships and they said they would value such strong friendships and peer-support to help 'survive' the PGCE course. Secondly, they found the fieldwork valuable in developing their own teaching expertise and so this would be of direct benefit to them in their second practical teaching experience.

The second factor in moving the fieldwork to February was financial, as air and hotel charges were at their yearly peak in May and having the fieldwork earlier would substantially reduce the price of the trip. Moving to

the February half-term proved, on the whole, to be successful, but it was not altogether unproblematic as the collaborative inter-disciplinary working with the geographers proved to be less productive than in the past. In terms of explanation, I believe the geography beginning teachers who participated were less motivated than previous participants because the fieldwork was now an optional element for them in contrast to the summer core fieldwork activities that were a mandatory part of their curriculum and consequently they treated the visits, and more importantly the plenary sessions, less seriously. The 2005 and 2006 fieldwork visits were solely business and economics education PGCE affairs.

A description of the fieldwork activities

In February 2005, I took a group of 26 business and economics beginning teachers to Krakow and this was the eighth such fieldwork experience that I have organised at the Institute of Education. The fieldwork activity included a number of specific visits: a car plant, a brewery, a heat and power plant, a cigarette factory, an agricultural hothouse, a salt mine and the Auschwitz death camp². Prior to the fieldwork, there were three preparatory elements which were designed to prepare the beginning teacher for the trip and to set high expectations of them and their contributions to the trip.

First, a handbook was issued which included a number of prior readings to raise the base knowledge-levels of the beginning teachers. Secondly, an Institute of Education colleague gave a talk where he contextualised and problematised the holocaust. Thirdly, a meeting was held to overview the trip and to answer students' questions. Logistical matters such as currency conversion and appropriate attire were dealt with in this meeting.

² February 2006 saw my ninth fieldwork trip. The programme was broadly similar to the 2005 one, with a visit to a farm replacing the hothouse. The farm owner gave a talk about the impact of EU membership on Polish farmers, he discussed the impact of falling corn prices on his crop growing strategy, he discussed husbandry issues, in particular pig farming and his new diversification, ostrich farming and finally he speculated on the possibility of starting agro-tourism on his farm.

We arrived in Krakow on the February 9th, checked into our hotel and had a guided tour of the town in the afternoon. The evening's plenary session explored the beginning teachers' initial impressions of the town. Early next morning we departed for the neighbouring town of Tychy where we spent the morning visiting the Fiat car plant where we observed the entire car assembly process from components to finished vehicle. The plant is extensively mechanised with most production being undertaken by robots using a just-in-time production system. In the afternoon we toured the Tychy brewery and again witnessed state-of-the-art technology. While the Tychy brewery is one of Poland's oldest breweries, it is now part of the South Africa Breweries International group, one of the world's largest brewers. The evening's plenary session examined issues of globalisation, the European Union, the relative input of different factors of production, health and safety policy, marketing and product development.

On the morning of February 11th we visited a French-owned Heat and Power plant in the neighbouring town of Nowa Huta which supplies power (and heat in the form of piped hot water) to the town of Krakow. It is a modernised plant that uses coal as its energy source. We lunched at a 'bar mleczny'³ and in the afternoon toured the Philip Morris tobacco plant. The visit included talks from the production manager, accounts manager and marketing manager of the firm. A one hour tour enabled us to see manufacture from raw tobacco leaf to cartooned packages of cigarettes.

The evening's plenary examined issues of production, marketing, foreign ownership of industry, problems associated with reductions in staffing, pollution and the ethical issues of taking students on visits that include the manufacture of controversial products such as alcohol and tobacco. Also discussed was the lunchtime dining experience. Some of the beginning teachers felt somewhat uncomfortable during the lunch because in a sense the experience was voyeuristic in that we were seeing Poland's most poor and vulnerable citizens. While the other diners may have

³ Bar mleczny literally translates as 'milk-bar'. Milk bars are characterised by offering wholesome food at very reasonable prices. Relatively few are now in existence; they are seen by many as a relic of Poland's communist past. They are mainly patronised by pensioners, the unemployed and students.

looked upon this relatively rich group of visitors with wariness, the staff were friendly and helpful.

The following morning we visited an agricultural hothouse; a relatively small business, but one that was large enough to export its flowers. We were given a talk by the firm's general manager. In the afternoon, we visited the Wieliczka salt mine - now a tourist attraction, but formerly a working mine. On the final full day, we visited the death camp of Auschwitz. This was a particularly poignant time to visit given that it was the sixtieth anniversary of the camp's liberation. The visit is part of the programme for social and cultural reasons and it is the only non-compulsory element of the trip; nevertheless all the beginning teachers chose to participate. My colleague led the plenary in the evening. Issues of whether the holocaust should be taught in schools and the lessons the holocaust should teach us as educators and citizens were discussed.

I now firmly believe that the plenary sessions are an essential element of the fieldwork experience. Each evening the plenary explored specific issues such as economic production, distribution, decision making, social organisation, culture and ideology. Teaching has of course social, moral, spiritual and cultural dimensions, but for many business and economics teacher these dimensions may not be so obvious at first. Therefore the plenaries have an important role in developing this element of a teacher's work.

Post-trip sessions were run at the Institute to consolidate the fieldwork experience. The sessions were run in conjunction with those beginning teachers (27 out of 55) who were unable to attend the Krakow trip, but who participated in London-based fieldwork instead.

Methodology

So far in this chapter, I have offered a descriptive account of the fieldwork from my perspective as a teacher educator. I now report on research that I

have undertaken with beginning teachers to discover their expectations and experiences of the fieldwork. There are three elements to the research: a questionnaire, beginning teachers' fieldwork diaries and a focus group interview.

The first element of the research was conducted in June 2001. It comprised a questionnaire that I administered in London a few days prior to the fieldwork commencing. The questionnaire had a dual purpose. Firstly as a research instrument to inform this thesis and secondly to clarify the beginning teachers' expectations of the trip and for this to inform my future planning, given that in 2001 the pedagogy of the fieldwork was still evolving. To that effect there were three open-ended questions:

1. What do you expect to gain, as an individual, out of the forthcoming fieldwork in Poland?
2. How do you expect to develop, as a subject specialist, out of the forthcoming fieldwork in Poland?
3. How do you expect to develop, as a teacher of future citizens, out of the forthcoming fieldwork in Poland?

I believe the use of the questionnaire as a research instrument was appropriate, for although questionnaires are generally associated with a quantitative approach, the open-ended nature of the questions produced qualitative replies. The questionnaire was thus 'fit for purpose' in that the beginning teachers' responses would illuminate their rationale for coming on the trip. I was very pleased to receive 17 responses from my business and economics education beginning teachers which constituted all of the fieldwork participants. I report the research findings below.

In February 2004 and June 2005 I conducted research to inform me of the beginning teachers' expectations, experiences and outcomes of their fieldwork, and to that effect I used research instruments that were appropriate to generate rich qualitative data. The first qualitative element involved the beginning teachers writing a fieldwork diary. I asked volunteers to write some initial thoughts about Poland before the fieldwork

commenced, to write a daily diary focusing on the individual visits and to then write a reflective summary of the trip (see Appendix 7). I was pleased to have received by email nine diaries for analysis. I report the research findings below.

The second qualitative element was a focus group interview conducted in June 2005 with some of the February 2005 fieldwork participants. I approached ten beginning teachers with a request for them to participate in the focus group. I chose the ten on the basis of generating a broadly representative sample of the fieldwork participants with regard to their age, gender and ethnic mix. Of the ten, eight volunteered to participate.

A focus group has a number of advantages as a research instrument as participants are exposed to the perspectives of others which may help to refine their views and to stimulate discussion (Greenbaum, 1998). The timing of the focus group, towards the end of the PGCE course, allowed the participants to look back and reflect upon their experience in the light of the rest of the PGCE course. The focus group interview explored a number of issues:

1. the original motivation of the participants in wanting to become teachers
2. what in their view constituted a 'good' teacher and whether this view had changed during the PGCE course
3. their motivation to go on the fieldwork to Krakow
4. what was learned on the fieldwork experience
5. which individual trips were most useful
6. how they developed as citizens and teachers.

With the permission of the focus group participants, I tape recorded the interview and I had the tape transcribed. I report the research findings below.

The two qualitative research instruments generated substantial written data and I used a textual analysis approach in dealing the transcribed data. In

respect of the beginning teachers' diaries and the focus group transcriptions, I treated the data in the same manner, by classifying the responses in terms of categories and themes and then re-ordering and organising responses accordingly. For reasons of confidentiality I have made the beginning teachers' responses anonymous. I report my findings below.

Results of questionnaire

With respect to the first question (what do you expect to gain as an individual?), there were two broad sets of replies. First, seven beginning teachers expressed a desire to develop a greater insight into Polish/Eastern European culture. Secondly, nine beginning teachers replied that they wished to develop expertise in running fieldwork themselves. Other replies were either vague or fitted better as replies to subsequent questions.

With respect to the second question (what do you expect to gain as a subject specialist?), there were broadly three sets of replies. First, eight beginning teachers identified specifically the desire to learn more about the transitional economies and to see first-hand an economy in the process of transition from a planned one to a market one. Secondly, six beginning teachers expressed a desire to broaden their business and/or economics subject knowledge. Thirdly, 15 beginning teachers hoped to be able to experience events which they could turn into examples or case studies which they could then use in their teaching.

With respect to the third question (what do you expect to gain as a teacher of future citizens?), there were fewer replies. Five beginning teachers hoped to understand more about the holocaust, eight beginning teachers hoped to enrich their general/personal knowledge and three hoped to understand better the 'human' dimension of teaching.

The findings of this research are straightforward and unsurprising. Beginning teachers have a number of motivations on wanting to come on

the fieldwork, including a desire to learn about fieldwork per se, a desire to develop subject knowledge and a desire to develop case studies and examples to use in future classroom teaching.

Results of diary research

Prior to visit

Typically, diaries prior to the visit revealed that the beginning teachers knew of the location of Poland prior to the trip but not necessarily much more. For example, BTA wrote:

Although I've been to Germany and the Czech Republic I have never been to Poland. I know that it borders the above countries and that its climate is similar to them. Architecturally I would expect Krakow to resemble Prague.

Some of the beginning teachers expected Poland to be grey and bleak. For example, BTB wrote:

Poland is not a country I would have envisaged myself going to. The reasons for this are varied and include the fact that I didn't really know anyone from Poland and as an Eastern European country I had always imagined that it would be somewhere quite bleak, not the sort of country you would go on holiday to.

Most of the beginning teachers were prepared for the cold weather. BTF wrote:

Apparently, it's cold there. Very cold. Like desert heat, it's the kind of cold you can live with "because it's dry."

While seven of the nine diary writers expressed ignorance about Poland, two were reasonably well informed.

Given what I have read and heard about Poland, I would expect to witness (via infrastructure and lifestyles) how economic progress has made tremendous positive strides since my visit back in 1994. I would expect a very pro-western (in particular pro-American) undercurrent of feeling amongst the indigenous Poles, as a result of their bitter historical experiences with neighbours to the west and to the east. I would expect a great deal of western-style commercialisation of shopping areas, and a consumer sector pretty much indistinguishable from that of Western European countries. Despite my expectation of pro-western tendencies on the Polish street, I would nevertheless anticipate a great deal of nationalism/patriotism amongst indigenous Poles, as a result of their ability to now proudly assert their own identity, independently of any third party. BTC

... ex-Eastern bloc, emerging from communism, reliance on coal, steel and other extractive/heavy industries being transformed, now, with the benefit of EU grants. Still predominantly low tech with agriculture - foreign trade is weak, but getting better. Good liberal (or is it conservative?) democracy, held back by communist heritage (attitudes, infrastructure ...), and poor communications/other infrastructure. BTH

As one would have expected, the majority of the participants came to Poland without a great deal of prior knowledge. The beginning teachers had to make sense of their new environment, and the various visual and spoken stimuli they encountered acted as catalysts in this process.

Impressions of Krakow

Many of the beginning teachers had their prior conceptions challenged on arrival at the country. For example, BTB wrote:

One of the first things that I remember seeing on that journey from the airport is the signs for Macro, IKEA and Tesco. Immediately my thoughts were confused, Poland has got a Tesco? How could that be? I thought it was a very poor country.

BTF wrote:

... after driving in the coach for twenty minutes to the hotel we saw signs for Coca Cola, Shell, McDonalds, KFC and IKEA. The effect of westernisation was clear and I hadn't even arrived at the hotel. I immediately started to plan a marketing lesson on globalisation.

If California was the “wild, wild west” in the 1800’s, then Poland is the “wild, wild east” of the twenty first century. It is edgy, cosmopolitan, adventuresome, contrasting and tragic. But, it is also a fighter and a survivor. It has had a difficult past but embraces it and hopes to learn and teach others from it. As the keepers of some of the worst death camps in the history of the world, Poland acknowledges the past and looks toward the future. Poland has evolved and changed albeit sometimes suddenly and violently.

The above quote illustrates how beginning teachers were trying to make sense of their environment, combining what they already knew with the experiences they were encountering.

Impressions of the individual trips

Fiat

All of the diary writers found the Fiat visit visually impressive and professionally useful. For example:

The most memorable business-related pure fieldwork for me was the Fiat plant. I am of the opinion that the best fieldwork affords the curious/motivated student the opportunity to work things out for himself through simple observation and in informal consultation with another student (i.e. without the need for an official guide). At least for me, the Fiat plant afforded that opportunity. Some may suggest that pure fieldwork without clearly defined objectives defies the starting principles of the much lauded ‘Assessment for Learning’. Nevertheless, the fact that one is working things out for oneself (whatever those ‘things’ are) keeps pure fieldwork by observation within the realms of constructivism, at least for the curious student. BTC

This was the most stunning visit for me of the entire tour. We saw the award winning Panda being developed from a few sheets of metal into a finished product which rolled smoothly off the production line. In this process was the use of Terminator 3 style robots and supervisory personnel on bikes. The whole sight was astonishing and proceeded with an uncanny efficiency. BTD

Seeing a hi-tech production process in real life gave the beginning teachers an opportunity to experience first-hand what they would be teaching in their classrooms. The visual experience has a function of

consolidating substantive knowledge, but beginning teachers also appreciated the development of pedagogical knowledge. It is interesting that BTD alludes to the 'wow' factor in learning which would act as a motivator for students experiencing a school trip of this nature.

Philip Morris

Many of the diary writers expressed some ethical concerns prior to the visit, but found the trip itself rich in experience. For example:

Prior to this visit I did have concerns about its educational value however I was very impressed by the tour. I had been concerned that the company would promote smoking but this was not the case. It was interesting to see the production process from the raw tobacco to the finished product. I have not used this as an example in my teaching yet but the visit has altered my perception of the educational value of such a trip and I would give serious consideration to taking students to a similar factory. BTA

The production process observed on this trip was of a different nature to the Fiat visit. This experience therefore further developed beginning teachers' substantive subject knowledge and, as in the previous example, the pedagogical value of fieldwork was also appreciated by the beginning teachers.

Hothouse

Beginning teachers found this visit to be a useful contrast to the larger-scale industrial visits. For example:

Guide was very informative and was easy to hear. The use of computers was interesting. This could be a useful illustration to students who are taking ICT as an option. BTA

The fact that the hothouse had an arrangement with Tesco and that Tesco has outlets in Poland demonstrates that Poland is on the path to genuine economic integration with Western Europe. BTC

The beginning teachers experienced yet another form of production and their substantive knowledge was further developed. Beginning teachers' discussions with the hot-house manager and an engagement with issues of marketing and distribution further enhanced the process of knowledge development.

Bar mleczny

Beginning teachers found the dining experience in the Nowa Huta area an interesting one and one that enhanced their cultural understanding of Poland. For example:

Food at the milk bar: very wholesome, very tasty and apparently very cheap. It made me wonder what proportion of the locals was reliant on such places as a means of sustenance. This visit was most definitely a throw-back to the communist era. Although I enjoyed the food, I had a weird feeling. It wasn't a feeling of guilt that we shouldn't be there treating the milk bar as a tourist novelty ... it was something bigger picture: it was a perverse desire to experience living in an Eastern Bloc country during the height of the Cold War. I don't know why I wanted this experience ... I just did. BTC

In Nowa Huta at Bar Mleczny, I felt slightly like an observer and an intruder eating food that was meant for people less fortunate than me. I was no longer sitting on the safety of a bus peering out through the windows at the passing pedestrians and countryside. They were living a hard life and had probably survived some very difficult and challenging events. I could see some of the effects of having lived in Poland in the faces of the patrons in the Bar Mleczny in Nowa Huta. Lunch there was fascinating because it felt like being invited into someone's home. I was slightly embarrassed for leaving food on my plate. BTF

Most visitors to Poland will only gain a 'touristy' experience of the country. This element of the fieldwork allowed beginning teachers to experience a side of Poland that is normally hidden from most visitors or indeed most young Poles who have had no personal recollection of the former communist regime. This cultural experience further enhanced the beginning teachers' understanding of Poland as a place and helped to contextualise the industrial elements of the fieldwork experience.

Auschwitz

The Auschwitz visit proved to be an emotionally draining one. Beginning teachers found it distressing, but a 'must' part of the fieldwork itinerary.

For example:

The visit to Auschwitz (sic) was very moving and emotional - something that if anyone goes to Poland should do at least once. It created a mix of emotions in me, I just cannot believe the enormity and callousness of what happened and worst still that maybe we haven't learnt anything as people from the atrocity that happened, as atrocities are still happening around the world. BTB

The tour of the museum began with a 20 min film clip in a cinema in which children under the age of 14 were not allowed to be admitted. It displayed the harsh and disturbing truth, which I found uncomfortable at times. Then we met with the famous lie at the camp gate 'work brings freedom'. The weather was cold, bleak and the snow drove on and on. We entered death camps, the wall of death and prison cells and were disgusted at what we saw. The harshest was to come when we witnessed a pile of hair, shoes, glasses and luggage once belonging to the prisoners. We then entered the gas chamber and crematorium, and the scenes will haunt me for the rest of my life. Two of my peers had already broken down in tears as we made our way back to the coach. Everyone was in a reflective eerie silence. We departed to Birkinau for a visit to the watch tower and a converted stable which made up a communal unhygienic and inhumane toilet. We had lunch at a country restaurant, Karczma Wykielzo, which served as a place where we could finally start to feel human again. BTB

Auschwitz is difficult to put into context because it is so many things to so many people. I found the trip sobering and frightening in that the actual history of it was not so long ago. To a fourteen year old sixty years seems like an eternity. To a forty year old, sixty years seems like yesterday. Not to acknowledge its existence would be to forget it ever happened. I hope students would come away from that visit with a greater understanding of human nature and of themselves as participants in history and not merely observers. Bruner discusses this type of outcome in education in helping children construct their meanings of the world by understanding the past, present and future. BTF

One of the purposes of this trip was to explore some of the holistic dimensions of teaching. While my defining role as an Institute tutor is as a business and economics teacher-educator, and this thesis is about developing creativity and subject knowledge in business and economics

teachers, to ignore the moral and ethical elements of teaching would be a mistake. During the visit, the beginning teachers engaged with some very challenging aspects of education that they might have to deal with in their classrooms and one of the purposes of the visit was to help them to construct ways of dealing with such issues. This visit clearly demonstrated the need for preparatory work and the need for post-visit follow-up.

Subject knowledge and pedagogy

Beginning teachers' diary entries showed that they reflected on issues of subject knowledge and pedagogy. For example:

The individual factory and business visits were fascinating. I had never been in a factory before and could appreciate the impact it would have on a business studies student. Being able to observe a production process and to touch raw materials while actually seeing the finished product brought previously learned subject matter to life. Fieldwork creates an environment that evokes prior learned ideas and helps connect the familiar to the theory. Bruner's theory of the spiral staircase and active learning has much more significance to me as a student teacher after having visited the factories as a student. BTF

I would anticipate being able to relatively effortlessly draw on one or more of the visits to bring to life the vast majority of business and economics topics on the syllabus. However, for fieldwork to have true educational value, it is important for more than the teacher to have experienced it. I would therefore take my students on fieldwork, and I would try and do so relatively early on in year 10 for GCSE and year 12 AS / AVCE. This way, the students would have had the fieldwork exposure prior to any significant topic coverage, allowing me to fully exploit the fieldwork throughout the two year GCSE or A-Level course. BTC

One can see that the participants gained from the experience in a number of ways. Firstly their substantive knowledge was developed and secondly they found the fieldwork experience to generate many examples and cases that they could use in their own teaching. Indeed, many found the experience so valuable that they would themselves run fieldwork with their own students.

The evening plenary sessions were positively viewed by the beginning teachers:

In addition to the obvious business studies links, I was surprised at the level of discussion about morality and business ethics among the group. I had not considered the impact of parental consent on a field trip or how a school might discourage controversial visits. Religion, culture, ethnicity and politics might all seem to have an influence on the selection of fieldwork location. BTF

The fieldwork documentation and nightly debriefings contrasted very positively with the lack of supporting materials and activities on a fieldtrip I went on in my second teaching placement. So I will use the materials and activities for the Poland trip as a benchmark. BTJ

One can see that the plenary sessions are a vital element of the fieldwork experience. While the individual visits themselves are useful in developing beginning teachers' substantive knowledge, plenaries allow beginning teachers to work in a community of learners that helps them to consolidate their own knowledge. Furthermore, the creative element of the group work in which they participated allowed them to develop the scope of their pedagogical knowledge.

Results of focus group research

Motivation for going on the trip

Beginning teachers were asked why they had signed-up to the Krakow fieldwork. There were two main motivations: first, to develop subject knowledge and secondly to experience a well-organised trip. For example:

As far as trying to gain something as a teacher, I don't have a huge amount of work experience because I've come almost straight from university and so being able to gather all these different case studies first hand I thought was really important for me and my teaching. BTO

And for me that was exactly the same reason, it didn't have to have been in Poland, it could have been in Wales or anywhere for me, in London,

but it was the fact of visiting car plants, power factories, places that I've never been in before. BTL

... but it's interesting to think about the dynamics of actually taking or being in a group of 30 or 40 and seeing how it actually works and seeing how the logistics totally change when you go from 1 or 2 to 30 and just the time and the planning that goes into it, which I wanted to experience. BTK

From the evidence of the above, it appears that the fieldwork is particularly valuable to the beginning teachers who have the least work experience. Some beginning teachers came on the trip to 'make-up' for not having relevant work experience themselves. This evidence is consistent with the questionnaire research findings above.

Preconceptions

Some of the beginning teachers stated that they came to Poland without preconceptions; others came with firmer expectations of what they might find:

I was conscious only of my own ignorance of Poland, so I tried not to have any if possible, as I'd never been to any of these types of places and I'd never been to an Eastern European country but Prague. But that's a long way down the road towards being westernized. So I tried not to have any and then when I got there I was very interested in everything that was going on. BTM

I did have some preconceptions. I'd always thought of it in some way as maybe half-way in between a developing African nation and one of the top technologically sound countries like Japan and the States and having been there, with what we saw maybe it was more closer to the top end of that. It seemed to be heading in the right direction economically. We saw one of the more prosperous parts of Poland. It's impossible to get a holistic picture. BTQ

Clearly one purpose of the fieldwork is to challenge preconceptions, and the evidence of the fieldwork experience is that this is done effectively.

Subject knowledge development

Beginning teachers were asked what they had learned on the trip with regard to their subject specialism. Clearly there were many subject-specific examples that the beginning teachers could take to their classrooms. For instance:

I think one of the things I would say is that I learned more about Poland as a country and some of its key industries. One of the most interesting parts of the trip for me was the presentation that the finance and HR person gave at the cigarette factory and talking about the market and how the EU had affected them and the logistics. And again, because Poland is a relatively new entry into the EU these are the kinds of things you can take back and use as case studies and talk about culture and moving from one management structure to another, as well as some of the specific industries and competition type stuff. When you bring those things back and you think about all the things that impinge and touch upon them, that there's quite a few things that you can pick up on and communicate to the students. BTP

Just thinking about the fieldtrip I thought I was a pretty good way to challenge students' perceptions that marketing is independent from financing. Just think about ways you can bring different parts of the syllabus together on whatever the trip – the hothouse, the tobacco, just ways to bring the linkages and try to show the relevance to students because sometimes in the classroom they just—oh that's marketing, that finance, we done that. So just bring it all together and I think the visits helped to do that. BTN

A very basic point – I quite enjoyed quite a lot of the trips because I probably didn't conceive of how a car was made. Or how exactly a bottle of beer comes. I know that's quite a simple thing and I'm sure it wouldn't effect (sic) all students in the way it effected (sic) me, but just interesting to see interrelated industries, interrelated materials, how it all comes together and I just think that process is quite interesting. BTK

I think that's true because when I was teaching in my second placement, we were doing operations and we looked at the mini-video and it kind of took you through the process that we saw at Fiat and I felt much more confident in teaching that and being able to talk about and talk about your own experiences and I think especially for someone that's only worked maybe one year in industry, that that's really important to have that first hand experience yourself in order to be able to give your students what you should be. BTO

What other people said, from all the visits I thought that was the best way to bring all everything together – distribution, production, everything that the students are likely to touch on, quality control, branding health and safety. So from that point of view the tobacco visit was quite useful. Obviously if you've had that experience it puts you in a much better position to relay that to your students. It brought textbook theory to real life. BTN

The focus group responses above correspond closely to the fieldwork diaries and thus triangulate the research findings. The fieldwork experience is clearly valuable and was effective in helping beginning teachers to develop and consolidate their substantive knowledge. Beginning teachers also see the benefit of running fieldwork for students and, in particular, see the value in bringing together the various strands of business studies.

Auschwitz

Beginning teachers found the trip disturbing and appreciated the need for pre-visit preparation and post-visit debriefing. All felt it was worthwhile in the context of 14-19 education. For example, BTM expressed:

I thought the Auschwitz tour was really interesting because the others were all tours that were pretty easy to slot into the timetable, whereas Auschwitz required a lot of scaffolding, I thought and I found that really interesting -- even for adults, and especially for children, I think, because there were really major issues that were being dealt with. I think it could have been a really destructive trip if it had not been done properly in terms of you'd generate a lot of emotions in children that then perhaps would not have been dealt with in a positive way. I certainly didn't feel particularly good after the trip and yet, because of the conversations that we were having amongst ourselves and the trip organizers, and we were able to deal with that in some way, but I thought it was interesting just to put myself in the position in kids. Maybe they'd be indifferent, but I don't think so. I think that would have probably generated big emotions in anybody.

Again, this is consistent with the diary research analysis and helps to triangulate the findings.

Non subject-specific issues

Many of the beginning teachers saw the value of the trip beyond the subject-specific aspects. For example:

As a young teacher with little experience of business, I was really pleased to feel that I had sort of filed some things in my back catalogue of experience that I can pull out. It's not perhaps that I've got something that I can immediately see is going to help me to teach this subject, but I feel more confident in the classroom as a result of having seen a wider range of things. BTM

I think as well that sometimes students can view teachers as these robots that go into the cupboard at the end of the night and come out in the morning. Whereas on a school trip like that, they can see, not that they don't see the human side of a teacher, but they can see that different side and that really interests students to see what their teachers are like. They can really respond to that and they know that you are giving up your time to see something with them and you have that relationship there and yeah students could relate to that well and then transfer it back to the classroom. BTR

These statements are again consistent with the diary research findings and help triangulate the overall findings.

In conclusion, the quality of responses to the three elements of the research suggests that beginning teachers treat the fieldwork very seriously. The beginning teachers come on the fieldwork to develop their subject knowledge, to develop case study material and scenarios for their own classrooms and to experience a model fieldwork experience and this is achieved through the visits and the evening plenary sessions. The plenaries have an additional benefit in developing the pedagogical aspects of knowledge in addition to the substantive ones.

Discussion

In planning business and economics education fieldwork, I am aware that this is not undergraduate fieldwork, and there is a need to pay attention to the specificity of the beginning teacher context. Whilst as a teacher-educator I may consider myself as a subject-specialist, my main area of expertise as an Institute tutor relates to issues of pedagogy rather than substantive knowledge. Rather than offer beginning teachers a package of knowledge which may then be used to devise lessons and transmit to the students they teach, the fieldwork stages a pedagogical relationship. It requires beginning teachers to develop the types of deeper understanding advocated by Prentice (2000) and explored in Chapters 3 and 4. I base my argument on the conceptualisation of teaching where teachers are scholars who both contextualize and produce knowledge, all the while sharing this knowledge with the students they teach. Accordingly, the classroom takes on the appearance of a 'think tank', an environment in which important knowledge is produced that has value outside of the classroom.

One of the advantages of undertaking fieldwork in an unfamiliar place (for the beginning teachers) is that the relationship between teacher/educator and learner is somewhat 'muddied'; the visit is an act of discovery and therefore one of knowledge creation. My task as a tutor is to provide a model pedagogy through which knowledge can be co-produced or co-authored. This conceptualisation is consonant with the arguments I put forward in Chapter 4.

For beginning teachers this is an excellent opportunity to develop their pedagogical content knowledge (Shulman, 1987), combining their new found knowledge from their particular visits with their developing pedagogical expertise into a format that would be understandable and accessible by their own students.

The pedagogical task that such a conceptualisation of knowledge-creation in a new environment provides is how to get beginning teachers to see the narratives they encounter and produce as social constructions. For example, there is a narrative that suggests that Poland is a place with a wealth of labour but a dearth of capital. Perhaps many of the participants who saw first-

hand the extensive mechanisation in the factories they visited had this conceptualisation challenged.

The field visit is based on the idea that these narratives need to be taken up and made the centre of discussion. This is part of a wider educational goal aimed at the social understanding of self (or reflexivity), which seeks to avoid both the reification of social scientific views of the world and the idea that all narratives and understandings are unique individual creations. Instead it suggests the need to stand outside of these narratives and focus on asking questions about how one's understandings of the world are socially produced (with others) and multiplying the range of meanings or stories that circulate. I suggest that such a task is appropriate to beginning teachers who are experts in their chosen subjects and who are about to engage in the difficult task of representing the world to children.

Hopefully, my account of the 'evolving pedagogy' of the fieldwork in Krakow is suggestive of what creativity in practice may look like in business and economics teacher education. In terms of the elements of creativity identified by the NACCCE report (DfES, 1999), the work beginning teachers produce is imaginative (in the sense that they are involved in the co-construction of narratives and new understandings of the place they are studying), original (in the sense that they are forming new materials and knowledge from their experience, and in that they are 'rubbing' together different disciplinary resources to create something new), purposeful (in the sense that beginning teachers are developing such understandings with a mind to using them in the teaching of their own subjects to school pupils) and valuable (in the sense that they are using their evolving professional judgement to evaluate the usefulness of the knowledge they have co-created).

The focus on a specific example of pedagogic practice seems to me to overcome some of the problems identified with the concept of creativity as discussed earlier in this thesis. Thus, the consideration of a single case allows one to get some handle on what creativity may actually look like in one's own subject discipline. It also allows one to make links with other traditions (such as critical thinking or enquiry learning) which already inform

the teaching of our disciplines and evaluate the usefulness of creativity as a concept within our own disciplines, and, finally, the question of whether or not creativity embodies some 'essential' or innate elements seems to disappear when we consider actual examples of specific teaching practices.

I make no apology for the overwhelmingly positive nature of this chapter. Having run this trip for so many years now, I have developed the pedagogical value of each individual visit and I believe that the participants are given a rich learning experience that could not be replicated in London. The residential nature of the fieldwork together with the intensive visit programme followed-up with evening plenaries makes it a special feature of the business and economics education PGCE that is valued by both the staff and the beginning teachers.

Nevertheless, I wish to offer one caveat, namely the lasting impact on the beginning teachers of the fieldwork experience. I have not pursued any formal research with previous participants and so I do not, for instance, make any claim that the teachers use their experiences directly in their classroom teaching. I have, however, spoken *en passant* to two former beginning teachers who were members of my fieldwork party a number of years ago. One of the two became excited by her memories and told me that she uses her experiences 'all the time'. She informed me that she refers to many of the individual visits when exemplifying economics and business concepts. The other teacher also had fond memories of the trip but told me 'yes it was a really good trip; I suppose I should make more use of it in my teaching'. From two conversations, I cannot generalise, but it seems very possible that some teachers do use the experience directly in their teaching while probably most do not.

Yet the primary purpose of the fieldwork is not to offer fieldwork as a way of generating examples to be used directly in the classroom, although this may indeed be a positive byproduct of the Krakow experience. Rather, it is to put my beginning teachers into a new context and for them to make sense of new experiences and then to consider how these may impact on their own

understanding of the discipline and their own teaching. By challenging their thinking, I believe that the fieldwork can make a lasting impact on the practice of my beginning teachers. For some beginning teachers, it may be the case that they had an enjoyable week and remembered a couple of visits that they could use in their teaching; and this is a positive outcome of the trip. For others, the impact may be more profound and may engender further thought and research and in such cases the impact will be greater.

It also seems likely, although I cannot offer tangible evidence of this, that the experience develops beginning teachers' creativity, as suggested by Csikszentmihalyi (1996) (and discussed in Chapter 3), in that by creating a 'learning community', creativity is enabled and encouraged. This does not mean that all beginning teachers' creativity levels are enhanced. Some, perhaps those that prefer to use pre-prepared photocopiable worksheets, as described in Chapter 6, may continue to remain competent classroom practitioners who 'deliver' their 'craft' to good effect. And this, of course, has its worth.

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Chapter 8: Conclusion

This thesis has examined three key areas that are discrete and yet also inter-related: teaching in a generic sense; teaching business and economics; and teaching and teacher education. What binds this thesis together are the links to my work as a teacher educator.

In my work as a PGCE tutor, I am privileged to work with diligent, able and enthusiastic beginning teachers. For the majority of beginning teachers, the PGCE represents a career change and a chance to embark on a rewarding vocation. This is clearly articulated by BTP¹ who states:

I came into teaching after 14 years in a financial analysis, management and accounting background and for me going into teaching was very simple. I wanted to do something that was more varied and interesting, to challenge myself to do something that I hadn't done before, and to make a difference to some people's lives.

While beginning teachers predominantly have altruistic motives for wanting to become teachers, they do not necessarily have a developed philosophy of what constitutes good teaching, and the process of developing reflective teachers is an ongoing one.

On the Business Studies and Economics Education course at the Institute of Education, it starts with a pre-course task of writing a 500 word statement of what constitutes a good teacher. This statement is explored on the first day of the PGCE and reviewed again the following June, towards the end of the PGCE. Many of the expected responses (e.g. teachers should have sound subject knowledge, be hardworking, and be caring) do not change, but what is

¹ During the focus group interviews as part of the Fieldwork research, I took the opportunity of asking some additional questions to explore the motivation for coming onto the PGCE and to examine and if the beginning teachers' opinions of what constitutes a good teacher had changed during their PGCE year.

interesting is the changed perception of the teaching role. I offer a few examples²:

I used to think that being a teacher was about having a big personality, but it's really not. It's about planning, consistency and hard work behind the scenes and not what the kids actually see most of the time. Really, that's just the icing on the cake ... BTM

... during the course we've learned so much more in terms of the actual lesson and of a good teacher in terms of creating that atmosphere within the classroom, creating fun, active lessons and the whole learning process of the students as well. My own thinking kind of encompasses more of that now, rather than just thinking about a teacher's personal attributes. BTR

... but I didn't really understand the whole process of them [teachers] actually thinking about me and trying to develop me and I think that is something that I have tried to do since I started teaching. BTK

The beginning teachers' observations above are examples of a change in thinking by them regarding what it means to be a good teacher. It is evidence that the Institute of Education, University of London business and economics education PGCE is producing not just competent teachers as evidenced by the TTA/DfES Standards, but also reflective teachers who are not only self-aware but also aware of their classroom environments and their effect on pupils. I expressed a concern in Chapter 1 that beginning teachers who had been taught in a predominantly didactic fashion may replicate a flawed pedagogy. However, my research for this thesis has served to greatly alleviate my fears. Beginning teachers can develop reflectively provided that the teacher training course is itself sufficiently challenging in appropriate ways.

One of my aims for the PGCE is for the course to challenge beginning teachers' thoughts of what constitutes effective pedagogy. For example, at an early stage of the course, perhaps when beginning teachers have just started to teach their pupils, I may be asked a question such as: what is the *best* way

² As above

to teach price elasticity of supply? This question is value laden in that it presupposes an epistemology that there is a *best* way of teaching price elasticity of supply. The question indicates to me that the beginning teacher may be conceptualising teaching as the transmission of knowledge, i.e. from him or her to the pupil. Naturally, I would challenge such a conceptualisation and rather than offer an 'off-the-peg' lesson plan, I would work with the beginning teacher to create a bespoke lesson plan. The change in conceptualisation from a transmissive to an interactive pedagogy is characterised by (beginning) teachers considering pupils' learning as the primary concern rather than the content that they are teaching.

I will now return to my former History teacher, Mr Thomas and the factors that made him a good teacher. First, he had excellent subject knowledge. This was evidenced by his non-reliance on notes, his avoidance of dictation and his non-use of teacher-prompts such as handouts and worksheets. Furthermore, he used questioning effectively and was knowledgeable when asked questions.

Secondly, he had excellent general pedagogical knowledge. As I recall, he never had any discipline problems in his lessons, the pace of his lessons was fast, pupil-participation was high and his monitoring of pupils' work was very good.

Thirdly, he had excellent knowledge of the History curriculum. As I recall, lessons flowed seamlessly and textbooks were used mainly for homeworks.

Fourthly, he had excellent pedagogical content knowledge. His teaching always appeared to be relevant and interesting. In other words, he appeared to be able to transform the History curriculum into a form that was accessible to his mixed-ability classes.

Finally, he knew his learners, understood their strengths and weaknesses and taught to their strengths. I am wholly confident that if he had been teaching to a different group of children, he would have taught differently to take into account their differing needs. Mr Thomas appeared to have expertise in a number of different, inter-related knowledge bases and this amalgam made him a good History teacher.

Mr Thomas's qualities, as described above, appear to fulfil Shulman's criteria of good teaching. But is having an amalgam of knowledge bases sufficient to be a good teacher? My argument is that there is still a missing ingredient, and this is creativity in planning and teaching. Mr Thomas was indeed a creative teacher: his lessons were varied and exciting; furthermore, the activities that we as pupils did were themselves creative. In working in groups, in solving problems collectively, in being challenged to think and articulate our arguments, our work was in itself creative and stimulated our creative instincts.

In Chapter 3, I stated that creativity could be conceptualised as both an individualistic phenomenon and as a social one. I aver that Mr Thomas was able to be creative, not just because of his individual talents, but also because of a number of environmental factors. The school in which he taught was sympathetic to his teaching style and his somewhat unconventional approaches, and the pupils he taught were responsive to his endeavours. But in addition to these creativity enablers, there was a lack of creativity inhibitors. In the 2006 setting of a prescriptive National Curriculum and the pressure of school league tables I doubt if Mr Thomas, would have been afforded the institutional freedom to teach in such a liberal way. I have not seen Mr Thomas since 1985, but I sincerely hope he is still the inspiring teacher who taught me between 1973 and 1978.

In Chapter 3, I discussed the trade-off of the forces of entropy and creativity as described by Csikszentmihalyi. Entropy (in this sense) is about having a

quiet life and taking the easy option; it is a life-saving force that preserves one's energy. Creativity is about exploring and discovering the force that gives meaning to our lives and makes our lives exciting. It is helpful to consider Chapter 6 in terms of these two forces.

Chapter 6 is about the teaching of taxation; taxation being a difficult topic for teachers to teach in an exciting and relevant way. Teachers may take the creative approach and plan for discussions and debates and use role-plays and simulations. For this to work well, the teacher must have an excellent grasp of all the key concepts and be up-to-date about taxation policy and specific tax rates.

Conversely, many busy teachers may be happy to use 'off-the-peg' photocopiable handouts and worksheets (and have a video to show on Friday afternoon) and settle for an easier life. I am not suggesting such teachers are bad teachers, but rather that the pressure of the modern classroom has led them to adopt pragmatic solutions. Chapter 6 exposed some of these tensions and apparent contradictions.

The principle aim of my thesis has been to explore what constitutes good teaching in business and economics education to help my beginning teachers develop sound, research-led teaching approaches that will help them to become better teachers. A practical application of this was explored in Chapter 7.

Two underlying research themes run through this thesis: the importance of creativity in teaching and the importance of teachers' sound subject knowledge. My central argument is that strong subject knowledge combined with a creative approach is the key requisite to good teaching. I have noted in this thesis that the business and economics curriculum may act as an inhibitor to the beginning teachers' creative endeavours as beginning teachers struggle to cover extensive content. However, encouragement to take risks in

teaching creatively and teaching for creativity is conducive to providing an environment which fosters good teaching.

In his play *Man and Superman*, George Bernard Shaw did a great disservice to teachers when he wrote: *He who can, does. He who cannot, teaches*. His words are neat, even clever, but they represent an unforgivable slur on the reflexive teacher, for a supreme test of performance is the ability to transform substantive knowledge into a form that is intelligible to, and engaging for, schoolchildren. My research indicates that most teachers do this rather well and I suggest a new maxim: Those who can, do. Those who think, reflect, and understand, teach well.

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27.03.05

Appendices

Table 4.2 GCE A Level Performance Descriptions for Business Studies

	Assessment Objective 1	Assessment Objective 2	Assessment Objective 3	Assessment Objective 4
Assessment objectives	Candidates should be able to: demonstrate knowledge and understanding of the specified content.	Candidates should be able to: apply knowledge and critical understanding to problems and issues arising from both familiar and unfamiliar situations.	Candidates should be able to: analyse problems, issues and situations.	Candidates should be able to: evaluate and distinguish between fact and opinion and assess information from a variety of sources.
A/B boundary performance descriptions	Candidates characteristically: demonstrate knowledge and understanding of key business concepts contained in the AS specification, with few significant omissions.	Candidates characteristically: a. apply effectively relevant knowledge to business contexts a way that demonstrates understanding appropriate numerical techniques to business contexts b. cope with familiar and unfamiliar business situations.	Candidates characteristically: a. analyse problems and situations by: building up logical arguments using appropriate numerical and non-numerical techniques.	Candidates characteristically: a. analyse problems and situations by: building up logical arguments using appropriate numerical and non-numerical techniques.
E/U boundary performance descriptions	Candidates characteristically: a. demonstrate knowledge and some understanding of business concepts contained in the AS specification.	Candidates characteristically: a. apply in part: relevant knowledge to business contexts a way that demonstrates some understanding appropriate numerical techniques to business contexts b. cope with familiar business situations.	Candidates characteristically: a. provide partial analysis of problems, issues and situations by: building up arguments using appropriate numerical and non-numerical techniques.	Candidates characteristically: a. partially evaluate by demonstrating one or more of the following: prioritising evidence and arguments, making judgements and presenting conclusions.

Source: Qualifications and Curriculum Agency (2003) at http://www.qca.org.uk/ages14-19/downloads/bus_pd.pdf

Table 4.3 Performance Criteria for GCE Applied Business (AS)

	Assessment Objective 1	Assessment Objective 2	Assessment Objective 3	Assessment Objective 4
Assessment Objective	Candidates demonstrate knowledge and understanding of the specified content and relevant business skills.	Candidates apply knowledge and understanding of the specified content and relevant business skills.	Candidates use appropriate methods in order to obtain and select information from a range of sources to analyse business problems.	Candidates evaluate evidence to reach reasoned judgements.
A/B boundary performance descriptions	Candidates characteristically demonstrate: a. depth of knowledge and understanding of a range of key business concepts across the AS specification b. an understanding of the benefits of relevant business skills and how and when these can be used.	Candidates characteristically apply effectively: a. depth of knowledge and understanding of a range of key business concepts across the AS specification b. relevant business skills to business contexts c. appropriate numerical techniques to business contexts.	Candidates characteristically: a. select relevant and up-to-date information from a range of sources b. use appropriate numerical and/or non-numerical techniques on the selected information to analyse business issues, problems or opportunities.	Candidates characteristically: a. demonstrate evaluation by: <input type="checkbox"/> prioritising evidence and arguments <input type="checkbox"/> showing judgement in the selection and presentation of findings <input type="checkbox"/> presenting supported conclusions <input type="checkbox"/> making appropriate recommendations
E/U boundary performance descriptions	Candidates characteristically demonstrate, perhaps with significant omissions: a. knowledge and some understanding of a range of business concepts contained in the AS specification b. an understanding of relevant business skills and when these can be used.	Candidates characteristically apply: a. knowledge and some understanding of a range of business concepts contained in the AS specification b. relevant business skills to business contexts c. appropriate numerical techniques to business contexts.	Candidates characteristically: a. collect relevant and up-to-date information from a limited range of sources b. use appropriate numerical and/or non-numerical techniques on the collected information to partially analyse business issues, problems or opportunities.	Candidates characteristically: a. demonstrate evaluation by using some of the following: <input type="checkbox"/> prioritising evidence <input type="checkbox"/> presenting conclusions <input type="checkbox"/> making recommendations

Source: QCA Performance Descriptions for GCE Applied Business at <http://www.qca.org.uk/ages14-19/downloads/appbusinesspd.pdf>

Appendix 2

TEACHERS' PACK FINAL QUESTIONNAIRE

****RANDOMLY SHOW INTRO 1 AND INTRO 2****

INTRO 1

Good morning/afternoon, my name is ...calling from BMRB Social Research, an independent research organisation in London. We are carrying out an important survey for the Institute of Education at London University about the teaching of tax related topics. The results will be used by the Inland Revenue to help develop tax related teaching materials. A letter about this research has been sent to the Head Teacher at your school. I need to speak to the teacher responsible for co-ordinating Citizenship studies.

Repeat intro if necessary when speaking to correct person

May I ask you some questions for the survey? The interview won't take much time and your answers will, of course, be treated confidentially and anonymously.

INTRO 2

Good morning/afternoon, my name is ...calling from BMRB Social Research, an independent research organisation in London. We are carrying out an important survey for the Institute of Education at London University about the teaching of tax related topics. The results will be used by the Inland Revenue to help develop tax related teaching materials. A letter about this research has been sent to the Head Teacher at your school. I need to speak to the Head of Business Studies at your school.

Repeat intro if necessary when speaking to correct person

May I ask you some questions for the survey? The interview won't take much time and your answers will, of course, be treated confidentially and anonymously.

ASK ALL

QS1

INTERVIEWER: WILL YOU BE INTERVIEWING THE CITIZENSHIP CO-ORDINATOR OR A BUSINESS STUDIES TEACHER?

SINGLE CODED

1. Citizenship Co-ordinator
2. Business Studies teacher

Appendix 2

ASK IF QS1= Citizenship Co-ordinator
QS2

Firstly, can I just check, are you the teacher responsible for co-ordinating Citizenship studies in your school in the next academic year?
SINGLE CODED

1. Yes
2. No

ASK IF QS2= Business Studies teacher
QS3

And is Business Studies your current subject specialism?
SINGLE CODED

1. Yes
2. No

IF QS2=NO OR QS3 = NO

Thank you very much for your time, that is all the questions I need to ask you.
****TERMINATE****

**IF QS2=YES
GO TO CITIZENSHIP SECTION**

**IF QS3=YES
GO TO BUSINESS STUDIES SECTION**

Appendix 2

CITIZENSHIP SECTION (ASK IF IF QS2=YES)

ASK ALL

Q1

What is your current subject specialism?

SINGLE CODED

1. Art
2. Biology
3. Business Studies
4. Chemistry
5. Economics
6. English
7. French
8. Geography
9. German
10. History
11. Home Economics
12. Information Technology (IT)
13. Maths
14. Personal and Social Health Education (PSHE)
15. Physical Education (PE)
16. Physics
17. Politics
18. Religious Education (RE)
19. Sociology
20. Spanish
21. Other (specify)

ASK ALL

Q2

As part of your work as a teacher of Citizenship, how likely are you to teach tax related topics within the Citizenship curriculum? By tax related topics I mean things like the link between taxation and the funding of public services.

SINGLE CODED

1. Very likely
2. Fairly likely
3. Not very likely
4. Not at all likely

Don't know

ASK IF Q2=NOT VERY LIKELY OR NOT AT ALL LIKELY

Q3

Why do you say that?

OPEN-ENDED

Don't know

ASK IF Q2=VERY LIKELY OR FAIRLY LIKELY

Q4

To which year groups will you teach tax related topics, under the new Citizenship curriculum?

MULTI-CODED

1. Year 7
2. Year 8
3. Year 9

Appendix 2

4. Year 10
 5. Year 11
 6. Other (specify)
- Don't know

ASK IF Q2=VERY LIKELY OR FAIRLY LIKELY

Q5

And about how many hours per Key Stage, on average, do you think you will spend teaching tax related topics under the new Citizenship curriculum?

INTERVIEWER: PROBE FOR BEST ESTIMATE.

ALLOW RANGE 0-99

Don't know

ASK ALL

Q6

How important do you think tax related topics will be in the Citizenship curriculum?

SINGLE CODED

1. Very important
 2. Quite important
 3. Not very important
 4. Not at all important
- Don't know

Appendix 2

ASK ALL

Q7

I am going to read out some things that might be included in the tax related topic within the Citizenship curriculum. For each can you tell me how relevant you think they are to the Citizenship curriculum?

SINGLE CODED

****Randomise list****

- The amount of tax collected on earnings
- The different types of taxes for example Income tax, VAT, Excise Duty etc
- The link between taxes and government spending
- The moral and ethical reasons for paying taxes
- The difference between direct and indirect tax
- The effect of taxation on income levels

1. Very relevant
 2. Quite relevant
 3. Not very relevant
 4. Not at all relevant
- Don't know

ASK ALL

Q8

Still thinking about things that might be included in the tax related topic within the Citizenship curriculum. How confident are you about teaching each of these to pupils in Key Stages 3 and 4?

SINGLE CODED

****Randomise list****

- The amount of tax collected on earnings
- The different types of taxes for example income tax, VAT, Excise Duty etc
- The link between taxes and government spending
- The moral and ethical reasons for paying taxes
- The difference between direct and indirect tax
- The effect of taxation on income levels

1. Very confident
 2. Quite confident
 3. Not very confident
 4. Not at all confident
- Don't know

Appendix 2

ASK ALL

Q9

How knowledgeable do you feel about each of the following types of tax?

SINGLE CODED

Randomise list

- Income tax
- National Insurance
 - VAT
 - Tax credits
- Environmental taxes
 - Excise Duties
- Business tax ie Corporation tax

1. Very knowledgeable
 2. Quite knowledgeable
 3. Not very knowledgeable
 4. Not at all knowledgeable
- Don't know

ASK IF Q2=VERY LIKELY OR FAIRLY LIKELY

Q10

Do you currently have any useful materials for teaching.....

SINGLE CODED

- The amount of tax collected on earnings
- The different types of taxes for example income tax, VAT, Excise Duty etc
- The link between taxes and government spending
- The moral and ethical reasons for paying taxes
- The difference between direct and indirect tax
- The effect of taxation on income levels

1. Yes
 2. No
- Don't know

Appendix 2

ASK ALL

Q11

What type of teaching materials would you PREFER to use when teaching tax related topics?

INTERVIEWER: CODE NULL IF NONE OF THESE
SINGLE CODED

READ OUT

1. Paper based activities
2. Computer based activities
3. Combination of both Paper and Computer based activities

Don't Know

Null

ASK IF Q11=PAPER BASED ACTIVITIES

Q12

Which of these paper based teaching materials would you find useful?

INTERVIEWER: CODE ALL THAT APPLY.

PROBE: Are there any other teaching materials that you would find useful?

MULTI CODED

READ OUT

1. An information pack
2. Posters
3. A game
4. A role play/simulation
5. Worksheets
6. Other (specify)

Don't Know

ASK IF Q11=COMPUTER BASED ACTIVITIES

Q13

Which of these computer based teaching materials would you find useful?

INTERVIEWER: CODE ALL THAT APPLY.

PROBE: Are there any other teaching materials that you would find useful?

MULTI CODED

READ OUT

1. The internet/Web sites
2. A game
3. A role play/simulation
4. Worksheets
5. Other (specify)

Don't Know

Appendix 2

ASK IF Q11=A COMBINATION OF PAPER AND COMPUTER BASED ACTIVITIES

Q14

Which of these paper and computer based teaching materials would you find useful?

INTERVIEWER: CODE ALL THAT APPLY.

PROBE: Are there any other teaching materials that you would find useful?

MULTI CODED

READ OUT

1. The internet/Web sites
2. An information pack
3. Posters
4. A game
5. A role play/simulation
6. Worksheets
7. Other (specify)

Don't Know

ASK IF Q11 NOT DK/NULL

Q15

Why would you prefer (ANSWER GIVEN AT Q11)?

OPEN-ENDED

Don't Know

No Answer

ASK ALL

Q16

Do you have access to computers for developing Citizenship lesson plans?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q17

Will students have access to computers to use during Citizenship lessons?

SINGLE CODED

1. Yes
 2. No
- Don't know

Appendix 2

ASK ALL

Q18

Do you have access to the internet for developing Citizenship lesson plans?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q19

Will students have access to the internet to use during Citizenship lessons?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q20

Where do you normally get information from about new teaching materials?

INTERVIEWER: CODE ALL THAT APPLY. DO NOT PROMPT.

MULTI-CODED.

1. Subject associations eg The Association for Teaching Citizenship, The Society of Teachers of Business Education (STBE)
 2. Times Educational Supplement (TES)
 3. The internet/Web sites
 4. LEA newsletters/advisory services
 5. Publisher's mailings/Direct mailing
 6. Colleagues/other teachers/word of mouth
 7. Conferences/exhibitions
 8. Courses
 9. Other (specify)
- Don't know

Appendix 2

ASK ALL

Q21

In your opinion, which of these sources provide USEFUL information about new teaching materials?

INTERVIEWER: CODE ALL THAT APPLY. CODE NULL FOR NONE.
MULTI CODED.

READ OUT

1. Subject associations eg The Association for Teaching Citizenship, The Society of Teachers of Business Education (STBE)
2. Times Educational Supplement (TES)
3. The internet/Web sites
4. LEA newsletters/advisory services
5. Publisher's mailings/Direct mailing
6. Colleagues/other teachers/word of mouth
7. Conferences/exhibitions
8. Courses
9. Other (specify)
Don't know
Null

ASK ALL

Q22

In deciding whether new teaching materials are going to be useful or not, what things are particularly important to you?

INTERVIEWER PROBE: What do the materials have to offer? What else?

OPEN-ENDED

Don't know

No answer

ASK ALL

Q23

Do you currently have any teaching materials for teaching tax related topics?

SINGLE CODE

1. Yes
 2. No
- Don't know

Appendix 2

ASK IF Q23=YES

Q24

Which tax related teaching materials do you currently have?

INTERVIEWER: CODE ALL THAT APPLY.

MULTI CODED

READ OUT

1. Activities/Worksheets
2. Text books
3. Web sites on the internet
4. Videos
5. An information pack
6. Posters
7. A game
8. A role play/simulation
9. Other (specify)

Don't know

ASK IF Q23=YES

Q25

Overall, how would you rate the teaching materials that you have?

SINGLE CODED

1. Excellent
2. Good
3. Adequate
4. Poor

Don't know

ASK IF Q25=POOR

Q26

Why do you say that?

OPEN ENDED

Don't know

Appendix 2

ASK ALL

Q27

Are you currently looking for any (IF Q23=YES 'additional') teaching materials for teaching tax related topics?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q28

INTERVIEWER: RECORD HERE ANY OTHER RELEVANT COMMENTS
OPEN-ENDED.

Appendix 2

BUSINESS STUDIES SECTION (ASK IF QS3=YES)

ASK ALL

Q29

Is a Key Stage 4 Business Studies course being taught in your department this academic year?

INTERVIEWER: IF NECESSARY, THIS INCLUDES BOTH GCSE, VOCATIONAL GCSE AND OTHER NON-EXAM COURSES.

NB THE COUSE MUST BE KEY STAGE 4 (YEAR 10 AND YEAR 11).

SINGLE CODED

1. Yes
2. No

ASK IF Q29=YES

Q30

How many classes in Key Stage 4 are currently on Business Studies courses?

INTERVIEWER: THE COUSES MUST BE KEY STAGE 4 (YEAR 10 AND YEAR 11).

ALLOW RANGE 1-99

Don't know

ASK ALL

Q31

Do you expect your department to teach Key Stage 4 Business Studies next academic year?

INTERVIEWER: THE COUSES MUST BE KEY STAGE 4 (YEAR 10 AND YEAR 11).

SINGLE CODED

1. Yes
 2. No
- Don't Know

IF Q29=NO AND Q31=NO

Thank you very much for your time, that is all the questions I need to ask you.

****TERMINATE****

ASK ALL

Q32

In teaching Business Studies at Key Stage 4, does your department currently teach tax related topics? By tax related topics I mean things like the impact of taxes on business.

INTERVIEWER: THIS RELATES TO KEY STAGE 4 ONLY (YEAR 10 AND YEAR 11).

SINGLE CODED

1. Yes
 2. No
- Don't Know

Appendix 2

ASK IF Q32=YES

Q33

And on which of these courses are tax related topics taught?

INTERVIEWER: CODE ALL THAT APPLY. PROMPT IF NECESSARY.

MULTI CODED

1. GCSE
 2. Vocational GCSE
 3. Young Enterprise Project
- Other (specify)
Don't know

ASK IF Q32=NO

Q34

Does your department intend to teach tax related topics at Key Stage 4 in the future?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK IF Q34=YES

Q35

And on which of these courses will tax related topics be taught?

INTERVIEWER: CODE ALL THAT APPLY. PROMPT IF NECESSARY.

MULTI CODED

1. GCSE
 2. Vocational GCSE
 3. Young Enterprise Project
- Other (specify)
Don't know

ASK IF Q34=NO

Q36

Why not?

OPEN ENDED

Don't know

Appendix 2

ASK IF Q32=YES

Q37

Thinking about the Key Stage 4 Business Studies courses that are currently being taught, which of the following TOPICS are currently being taught?

SINGLE CODED

Randomise list

- The amount of tax collected on earnings
- The different types of taxes for example income tax, VAT, Excise Duty etc
- The link between taxes and government spending
- The moral and ethical reasons for paying taxes
- The difference between direct and indirect tax
- The effect of taxation on income levels
- The impact of taxes on business

1. Yes

2. No

Don't Know

ASK IF Q32=YES

Q38

And about how many hours during the course, on average, is spent teaching tax related topics?

INTERVIEWER: PROBE FOR BEST ESTIMATE.

ALLOW RANGE 0-99

Don't Know

ASK IF Q32=YES

Q39

Do you expect your department to spend more hours teaching tax related topics in the next academic year?

SINGLE CODED

1. Yes

2. No

Don't know

ASK IF Q39=YES

Q40

Why do you think that?

OPEN-ENDED

Don't know

No answer

Appendix 2

ASK ALL

Q41

I am going to read out some things that might be included in the tax related topic within the Business Studies curriculum. How confident are you about teaching each of these to pupils in Key Stage 4?

****Randomise list****

- The amount of tax collected on earnings
- The different types of taxes for example income tax, VAT etc
- The link between taxes and government spending
- The moral and ethical reasons for paying taxes
- The difference between direct and indirect tax
- The effect of taxation on income levels
- The impact of taxes on business

SINGLE CODED

1. Very confident
 2. Quite confident
 3. Not very confident
 4. Not at all confident
- Don't know

ASK ALL

Q42

How knowledgeable do you feel about each of the following types of tax?

SINGLE CODED

****Randomise list****

- Income tax
- National Insurance
 - VAT
 - Tax credits
- Environmental taxes
 - Excise Duties
- Business tax ie Corporation tax

1. Very knowledgeable
 2. Quite knowledgeable
 3. Not very knowledgeable
 4. Not at all knowledgeable
- Don't know

Appendix 2

ASK ALL

Q43

What type of teaching materials would you PREFER to use when teaching tax related topics?

INTERVIEWER: CODE NULL IF NONE OF THESE

SINGLE CODED

READ OUT

1. Paper based activities
2. Computer based activities
3. Combination of both Paper and Computer based activities

Don't Know

Null

ASK IF Q43=PAPER BASED ACTIVITIES

Q44

Which of these paper based teaching materials would you find useful?

INTERVIEWER: CODE ALL THAT APPLY.

PROBE: Are there any other teaching materials that you would find useful?

MULTI CODED

READ OUT

1. An information pack
2. Posters
3. A game
4. A role play/simulation
5. Worksheets
6. Other (specify)

Don't Know

ASK IF Q43=COMPUTER BASED ACTIVITIES

Q45

Which of these computer based teaching materials would you find useful?

INTERVIEWER: CODE ALL THAT APPLY.

PROBE: Are there any other teaching materials that you would find useful?

MULTI CODED

READ OUT

1. The internet/Web sites
2. A game
3. A role play/simulation
4. Worksheets
5. Other (specify)

Don't Know

Appendix 2

ASK IF Q43=A COMBINATION OF PAPER AND COMPUTER BASED ACTIVITIES

Q46

Which of these paper and computer based teaching materials would you find useful?

INTERVIEWER: CODE ALL THAT APPLY.

PROBE: Are there any other teaching materials that you would find useful?

MULTI CODED

READ OUT

1. The internet/Web sites
2. An information pack
3. Posters
4. A game
5. A role play/simulation
6. Worksheets
7. Other (specify)

Don't Know

ASK IF Q43 NOT DK/NULL

Q47

Why would you prefer (ANSWER GIVEN AT Q43)?

OPEN-ENDED

Don't Know

No Answer

ASK ALL

Q48

Do you have access to computers for developing Business Studies lesson plans?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q49

Do students have access to computers to use during Business Studies lessons?

SINGLE CODED

1. Yes
 2. No
- Don't know

Appendix 2

ASK ALL

Q50

Do you have access to the internet for developing Business Studies lesson plans?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q51

Do students have access to the internet to use during Business Studies lessons?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q52

Where do you normally get information from about new teaching materials?

INTERVIEWER: CODE ALL THAT APPLY. DO NOT PROMPT.

MULTI-CODED.

1. Subject associations eg The Association for Teaching Citizenship, The Society of Teachers of Business Education (STBE)
 2. Times Educational Supplement (TES)
 3. The internet/Web sites
 4. LEA newsletters/advisory services
 5. Publisher's mailings/Direct mailing
 6. Colleagues/other teachers/word of mouth
 7. Conferences/exhibitions
 8. Courses
 9. Other (specify)
- Don't know

Appendix 2

ASK ALL
Q53

In your opinion, which of these sources provide USEFUL information about new teaching materials?

INTERVIEWER: CODE ALL THAT APPLY. CODE NULL FOR NONE.
MULTI CODED.

READ OUT

1. Subject associations eg The Association for Teaching Citizenship, The Society of Teachers of Business Education (STBE)
2. Times Educational Supplement (TES)
3. The internet/Web sites
4. LEA newsletters/advisory services
5. Publisher's mailings/Direct mailing
6. Colleagues/other teachers/word of mouth
7. Conferences/exhibitions
8. Courses
9. Other (specify)
Don't know
Null

ASK ALL
Q54

In deciding whether new teaching materials are going to be useful or not, what things are particularly important to you?

INTERVIEWER PROBE: What do the materials have to offer? What else?
OPEN-ENDED

Don't Know
No answer

ASK ALL
Q55

Do you currently have any teaching materials for teaching tax related topics?
SINGLE CODE

1. Yes
 2. No
- Don't know

Appendix 2

ASK IF Q55=YES

Q56

Which tax related teaching materials do you currently have?

INTERVIEWER: CODE ALL THAT APPLY.

MULTI CODED

READ OUT

1. Activities/Worksheets
2. Text books
3. Web sites on the internet
4. Videos
5. An information pack
6. Posters
7. A game
8. A role play/simulation
9. Other (specify)

Don't know

ASK IF Q55=YES

Q57

How would you rate the teaching materials that you have?

SINGLE CODED

1. Excellent
2. Good
3. Adequate
4. Poor

Don't know

ASK IF Q57=POOR

Q58

Why do you say that?

OPEN ENDED

Don't know

Appendix 2

ASK ALL

Q59

Are you currently looking for any (IF Q55=YES 'additional') teaching materials for teaching tax related topics?

SINGLE CODED

1. Yes
 2. No
- Don't know

ASK ALL

Q60

INTERVIEWER: RECORD HERE ANY OTHER RELEVANT COMMENTS

OPEN-ENDED.

Appendix 3

School of Mathematics, Science and Technology
Head of School Professor Michael Reiss
Acting School Manager Susan C Williams

Business and Economics Education
Subject Leader: Business and Economics Education PGCE
Jacek (Jack) Brant BA MA PGCE ILTM

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Director Professor Geoff Whitty

April 2002

Dear *name*

Research to support the development of a 'Tax Pack' for schools.

We are seeking your school's assistance with a survey of teachers' needs for new teaching resources, designed to increase understanding of tax related topics in the context of financial literacy among pupils at Key Stages 3 and 4. The results of the survey will assist in the development of teaching materials covering taxation and issues related to taxation in the UK. Resource packs on this subject will be produced later this year by the Inland Revenue and made available free of charge to all teachers who request them.

An independent research organisation, BMRB Social Research, has been commissioned by the Institute of Education, University of London to conduct the fieldwork, which will be taking place at the end of April and early May. Your school is one of a sample of schools selected from the DfES Register to represent all secondary schools in the country. In each school, either the teacher responsible for co-ordinating Citizenship studies, or the head of Business Studies will be asked to take part in a short (10-15 minutes) interview on the telephone.

We hope that you will recognise the value of the survey and encourage the appropriate teacher to take part. The information provided by teachers will be **treated in the strictest confidence** and will be used for research purposes only. The survey results will be produced in such a way that no individuals or schools will be identifiable.

If you have any queries or concerns about the study, please do not hesitate to contact *name* at BMRB on *number*. If you do not hear from us by 9th May, it probably means we do not need to contact you after all.

Many thanks in anticipation of your help.

Yours sincerely,

Jacek Brant

Pursuing excellence in education

Appendix 4

School of Mathematics, Science and Technology

Head of School Professor Michael Reiss
Acting School Manager Susan C Williams

Business and Economics Education

Subject Leader: Business and Economics Education
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Director Professor Geoff Whitty

18th April 2002

Addressee

Dear Addressee

Research on a Tax Pack for schools

First, we are very pleased indeed that you are able to help us to conduct research for the Inland Revenue on the proposed new classroom resources. As an associate of the research project we shall be looking to you to help us set up the focus groups which will help to inform us as to teachers' views on the resources required.

The research objectives

The ultimate aim of this research is to contribute to broader efforts to increase financial literacy among school children. The Inland Revenue, together with Customs and Excise and the Treasury, are collectively concerned that students' understanding of taxation is currently hazy. They have set up this research project to find out how best to remedy the situation. They plan to produce teaching resources for Key Stages 3 and 4 that are suited to incorporation within existing courses.

Important objectives included in the research proposal are:

- to define the scope of the existing curriculum arrangements in relation to the teaching of taxation
- to identify the level of awareness of students and teachers about tax matters
- to identify the information and resource needs of teachers

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- to highlight the types of resources which are most likely to be used in the classroom to good effect.

The background and related research

The research programme is being led by Jacek Brant at the Institute of Education, University of London. BMRB, an organisation which specialises in social research, is collaborating with the Institute on this project. They will be conducting a telephone survey of teachers in England which begins next week. The telephone interviews are designed to gain an overview of teachers' experience of and attitudes to teaching taxation, as well as an understanding of their preferences in relation to different types of resources. This survey will yield predominantly quantitative information.

BMRB will also be moderating the focus groups which will seek the opinions of teachers from many different areas. The objective here is to obtain in-depth, qualitative detail which can be used in the planning of the new resources.

In addition to the telephone interviews and the focus groups, the research will include:

- a survey of teachers who have used the existing resource pack on taxation produced by the Inland Revenue
- interviews with advisers and officers in national bodies such as QCA.

We hope to generate the fullest information possible on the most desirable nature of the resources to be produced and the best ways of disseminating them. We will use the results of other recent research programmes where relevant to broaden the scope of the findings.

Arrangements for the focus groups

We are now able to set out the detailed requirements for the focus groups which will take place during May.

1. The focus groups will consist of a maximum of eight teachers drawn from six schools. In England, these will each be composed of four Business Studies teachers and four Citizenship teachers. In Wales, Scotland and N. Ireland Business Studies teachers will be involved, where appropriate along with some teachers of other subjects who may be considering integrating tax related topics in their subject teaching. It would be helpful if you have one or two reserves, so that if teachers drop out shortly before the focus group meets, the numbers do not fall too low. (Six participants would be the minimum desirable number).
2. The focus groups will be twilight sessions, usually from 5 to 6.30 p.m. The venue will be selected by you, using space available in your own institution. The room selected should be a quiet one where recording of the views expressed will not be interrupted by extraneous noise. Access should be reasonably easy in terms of

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parking or public transport, depending on the circumstances. We will pay for appropriate refreshments to be provided, guideline £5 per head, which you should arrange. Some dates have already been set for the meetings. The rest will take place during the weeks beginning 7th, 13th and 20th of May.

3. Schools should be selected for participation in a way which is balanced according to the type of schools in the area. There will be some variation from one group to another, for example, we would expect to find more urban schools in the Sunderland area than in Hampshire. However within that, we would like you to select a balanced group as to the general social background prevalent in the school, and as to the quality of academic results obtained by the school. The objective is to get a sample of teachers which reflects the nature of the schools in the area. We will need you to give us background information on each school, as to size, type of school, degree of social deprivation if any, and general ethos. A pro forma will be sent to you to complete; if possible please send this to us a week ahead of the date of the meeting.
4. Some of you may be able to include two teachers from independent schools in your group. We are looking for three focus groups where this arrangement will be possible, so that we can collect the view of six such teachers in all. If you can see an easy way to do this, please contact us soon.
5. Usually it will be most appropriate to select teachers who are heads of department or Citizenship co-ordinators. However, a classroom teacher with a strong interest in resources may also be a very useful source so we would want you to be flexible about this. Because of current pressures on teachers, we would aim to limit travel time to about half an hour.
6. In England, we anticipate that your contacts with Business Studies teachers will lead you on to suitable Citizenship co-ordinators who can be invited to participate. You may already know of teachers who are currently engaged in planning citizenship lessons for next academic year, anyway.
7. At an early stage in the process of making the arrangements, you should contact head teachers to ensure that they approve of their members of staff participating in this research. We can provide a standard format for the letter which explains the purpose of the research. This will allow them to opt out, if for example OFSTED are visiting.
8. There will be a topic guide which will set out the issues to be discussed during the focus group. BMRB will moderate the discussion, ensuring that all participants get good opportunities to express their views and that the relevant issues are fully opened up. There will be one observer who will also be present, either Jacek Brant, Nancy Wall or Marion Thomas from the Institute team. If you would also

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like to attend as an observer, that will be fine so long as you do not try to participate in the discussion.

9. A payment of £300 will be made to each associate in recompense for the effort required to organise the focus group. There is an additional budget to cover venues and refreshments. Each teacher will be paid £30 for expenses, however anyone who has significant travel expenses will receive those in addition to the £30.

The time frame

We do not have a great deal of time in which to organise this research as it is hoped that the resources can be made available to schools by the end of the year. We want to be able to finalise dates early next week so that you can get ahead with identifying schools, teachers and venues. We will continue to liaise with you between now and the time of the focus group.

Jacek Brant or Marion Thomas will be working with the focus groups in England. Nancy Wall will work with those in Scotland, Wales and N.Ireland.

Please do get in touch with me about any aspect of the above if there are causes for immediate concern. In any case you will hear from either myself, Nancy or Marion in the very near future because we still have a number of dates to fix. We must try to sort this our very early next week. This letter will be emailed; a hard copy will be sent to you as well.

If you want to know more about the purpose of the research, please contact *name* at the Inland Revenue on *number*.

Thank you for all your help.

Yours sincerely

Jacek Brant

Contact details	
<i>Nancy Wall</i>	<i>Marion Thomas</i>

Appendix 5

School of Mathematics, Science and Technology

Head of School Professor Michael Reiss
Acting School Manager Susan C Williams

Business and Economics Education

Subject Leader: Business and Economics Education
PGCE

Jacek (Jack) Brant BA MA PGCE ILTM

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Director Professor Geoff Whitty

25th April 2002

Addressee

Dear *Addressee*,

Research on a Tax Pack for schools

I am very pleased indeed that you are able attend the focus group at the Institute of Education on Tuesday, 30th April at 5:00 p.m. in room 804.

The ultimate aim of this research is to contribute to broader efforts to increase financial literacy among school children. The Inland Revenue, together with Customs and Excise and the Treasury, are collectively concerned that students' understanding of taxation is currently hazy. They have set up this research project to find out how best to remedy the situation. They plan to produce teaching resources for Key Stages 3 and 4 that are suited to incorporation within existing courses.

You will receive a tax-free payment of £30 plus travel expenses. I will have claim forms ready on Tuesday, so to speed up payment, please have your bank account details with you together with your National Insurance number. I will also provide a sandwich supper.

I look forward to seeing you on Tuesday at 5:00. Please phone me on my mobile (*number*) should you have any problems.

Yours sincerely,

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RESEARCH ON INLAND REVENUE TEACHERS PACK

Topic Guide- version 2 - 22/4/02

Key Objectives: To explore teachers' perspectives about:

- The extent to which taxation and personal finance issues are currently being covered within the national curriculum;
- Views about the financial information needs and requirements of pupils;
- The level and range of issues that can be covered within the curriculum
- The contexts within which education concerning financial literacy and taxation can realistically take place
- The range of resources and approaches that teachers believe pupils would find most useful, interesting and accessible
- The nature of any training and development needs that teachers may have in order to deliver the financial literacy and taxation curriculum effectively
- How teachers can be encouraged to include taxation within the syllabus

1. Introduction

- About Institute of Education/BMRB
- Aims of the study
- Commissioned by Inland Revenue
- Used to inform design of teaching materials to cover financial issues within the curriculum for citizenship education
- Introduce tape recorder/reassure about confidentiality
- Go through ground rules
- remind them about length of discussion

2. Background Information – go round the room and ask each person:

- Current and previous teaching experience (subject/s, level/s, number of years)
- Type of school (size, catchment area)
- Interest/connection with teaching about taxation/citizenship education

3. Coverage of taxation within the curriculum

- How much do they think young people know about taxation/personal finances issues/ or the way the government raises and spends its money; which young people; what level
- Whether anything about this is currently covered within their school; what aspects are covered;
- How are these topics covered; in which contexts and for which age groups;
PROBE: whether covered in
 - specific courses (business studies, economics, maths, politics etc)
 - PSHE framework
 - Personal Development, Life and Work (Northern Ireland only)
 - careers education
 - assembly
 - other extra curricula activities (trips to Parliament, schools councils The Real Game etc)

NB Be aware of differences in Scotland, Wales and Northern Ireland - see briefing notes.

- What sources of information they use to teach these topics
PROBE: publication/Internet/ mail sent to them by publishers (junk mail) etc
- Whether they aware of the current resources available to teach taxation and personal finance topics; which ones
PROBE: whether aware of/involved with the Personal Finance Education Group Website (www.pfeg.org.uk)
Other websites, inland revenue tax pack (includes a video), printed documents etc
- Experience of using these different resources; views about their use; how effective in communicating this information

4. Awareness of plans to teach taxation

- **[In Scotland, Wales and Northern Ireland]** Whether they are aware about plans to teach tax related topics; what is being planned

In England - there is little reference to tax matters in the citizenship exemplar frameworks - see briefing notes- so teachers may not recognise the above list
In Scotland - ministers are currently suggesting a paper suggesting it should be a cross curricular theme - but thinking is still at a very early stage
In Wales - Citizenship training is not due for consideration until Spring 2003
In Northern Ireland - Key Stage 3 pilot for Citizenship is going on now but it will not become statutory until 2004.

- **[In England]** Whether they are aware about what is required of them in terms of teaching the tax related topic under citizenship; what are they being asked to cover:

After spontaneous responses explore awareness of the following topics:

- the overall level of taxation in the UK
 - the different types of taxes for example Income tax, VAT, Excise Duty etc
 - the link between taxes and government spending
 - the moral and ethical reasons for paying taxes
 - the difference between direct and indirect tax
 - the effect of taxation on income levels
- How will these topics relate to the rest of the citizenship curriculum/other topics being taught

5. Difficulties and barriers to teaching taxation

- What are the difficulties/barriers in trying to teach about taxation
PROBE:
 - difficulties/barriers for teachers
(e.g. lack of time, knowledge, complex and technical area to teach etc.)
 - difficulties/barriers for young people
(e.g. lack of relevance, interest, ability to understand and engage with information)
 - other difficulties/barriers
- How can these difficulties/barriers be overcome

6. How tax related topics should be taught

- When should this be taught; what ages/level/key stages; should it be compulsory to all young people
- How much time **should** be devoted to it
- How should this time be distributed across the curriculum (i.e. as a separate component or module or integrated into the curriculum)
 - [*Where appropriate*] How can it be incorporated into the citizenship curriculum
- What is the most appropriate way to teach this type of information
- Suggestions for innovative ways to teach this type of information
PROBE: How can it be made:
 - interesting and relevant
 - engaging and fun
 - accessible
- How interactive/gimmicky should these methods be; any suggestions
- What would their ideal resources/materials to teach this information look like
PROBE:
 - What media should be used (website, computer, video, publication)
 - Whether resources should be targeted (to specific subjects/stages/ability ranges)
 - Degree of flexibility required to teach the course
 - Degree of detail required
- Ease/appropriateness of using computer-based resources
- How can a one pack fits all be developed for young people of different ages/levels/needs (limited resource - i.e. lowest common denominator)
- If they were designing the course themselves how would they do it; what advice would they give to the Inland Revenue

7. Encouraging teachers to teach

- How can teachers be encouraged to teach taxation
- What needs to happen to enable teachers to teach these topics
- How confident would they feel about teaching it; what can be done to help them feel more confident

- What kind of training and development will teachers need
- What sources of information would they use to teach these topics
PROBE: publication/Internet (e.g. Pfeg programme)/ mail sent to them by publishers (junk mail) etc
- How can teachers be encouraged to access internet based information resources (such as the pfeg programme)
- What can publishers do to get teachers to take notice of information about how to teach tax matters; what format should this information take;
- Whose help can be enlisted to persuade teachers to do this
- Whose endorsement would teachers respect and how should this be implemented (e.g. the Real Game worked because it was enforced by the DfES and there was sufficient funding to train teachers to do this)

Recap on the aims and check whether anything else to raise that has not been covered during the discussion

Appendix 7

Dear BT,

I wonder if you would be willing to help me in my doctoral research? If you choose to do so, I will keep your identity anonymous and I will adhere fully with BERA guidelines on research ethics.

The working title of my thesis is: 'Developing subject knowledge and creativity in teachers of business education' and I would like to devote part of a chapter on the fieldwork we do in Poland. In a nutshell, I am interested in how you as a teacher make sense of knowledge - turn personal subject knowledge into knowledge that pupils can understand and relate to.

Should you agree to help, this is what I would like you to do:

Before Polish fieldwork

Write up to one side of A4 on your thoughts about Poland. What do you know of Poland? Where has this information come from? What do you expect? What will the individual visits be like?

During Polish fieldwork

Write a daily diary of your experiences. The focus will probably be on the individual trips, but feel free to go beyond this if you wish. You should link it with the previous task - how has your knowledge of Poland been changing during the week?

After Polish fieldwork

Write a reflective summary of how the trip has affected your knowledge and understanding of Poland. Part of your reflection may focus in detail on one of the visits. Explain how this may contribute to your teaching back in England. How beneficial has this fieldwork been to you? Would you take your students to Poland on fieldwork or perhaps another country closer to home? Would you take your students on individual trips in England?