Identity, Influence and Interconnections:

Ethos and the N. Ireland Controlled education sector.

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February, 2019

This thesis is submitted in partial fulfilment of the requirements for the degree of Doctor of Philosophy in Education and Social Justice

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Identity, Influence and Interconnections: Ethos and the N. Ireland Controlled education sector.

This thesis results entirely from my own work and has not been offered previously for any other degree or diploma.

I declare that the word-length of this thesis conforms to the permitted maximum.

Signature

Abstract

Transferred from the ownership of the Protestant churches after Partition, N. Ireland's Controlled schools have long suffered from a lack of collective identity, representation and ethos. It is envisaged that these issues will be ameliorated by the introduction of the Controlled Schools' Support Council (CSSC), whose work is underpinned by a Vision Statement for the ethos of the sector. This study investigates the under-explored area of the Controlled Sector and its ethos, whose values underpin it and how these values reflect its schools and stakeholders. The research of ethos is viewed through the lens of policy and applies Ball's (1997) trajectory approach in considering the potential impact of the CSSC's statement upon the sector's ethos. Employing exploratory and embedded approaches (Cresswell and Plano Clark, 2007) to mixed-methods data collection, a large-scale survey of Controlled principals complemented semi-structured interviews with a representative sample of policy-makers and principals. The study found a fragmented, unconnected and unsupported sector, which, although linked to Christian values, is uncertain in articulating what it is, does and stands for. It found a warm welcome for the CSSC, for continuing and increased church involvement, for the Christian values espoused in the Vision Statement, believing that it will not disenfranchise those who hold other worldviews, and for the statement as a basis for a collective ethos underpinning schools' individual ethoi. In addition to new insights on the sector, this study adds to the body of knowledge on ethos, building on the claim that ethos needs connecting words to make it intelligible (Allder, 1993) by proposing that there are eight terms most frequently associated with, confused with, or substituted for ethos and that, collectively, these interconnect to distinguish it more clearly. It also concurs with Donnelly (2000) and McLaughlin (2005) that ethos is found in the 'gap' between intended and lived, but concludes that this gap can be significantly narrowed in conceptualising ethos at the intersection of these eight interconnectors, proposing an ethos test which identifies the ethos through the characteristics of each. In isolating the current attributes of the Controlled Sector's interconnectors, and using the findings to suggest how these might change in light of the CSSC and Vision Statement, the test showed that a different and more positive ethos might result.

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Acknowledgements

In memory of Steven Dempster

List of Abbreviations

CCMS	Catholic Council for Maintained Schools
CoI	Church of Ireland
CS	Controlled Sector
CSSBWG	Controlled Schools' Support Body Working Group
CSSC	Controlled Schools' Support Council
DE/DENI	Department of Education for Northern Ireland
EA	Education Authority
ELBs	Education and Library Boards
ESA	Education and Skills Authority
IMES	Irish Medium Education Sector
IS	Integrated Sector
MCI	Methodist Church of Ireland
MS	Maintained Sector
NI	Northern Ireland
NIA	Northern Ireland Assembly
NICIE	Northern Ireland Council for Integrated Education
PCI	Presbyterian Church in Ireland
RC	Roman Catholic
RE	Religious Education
TRC	Transferor Representatives' Council
VS	Vision Statement

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Introduction

Religion permeates the very DNA of N. Ireland (NI). In contrast to Alastair Campbell's New Labour vision for the rest of the UK (Cooling, 2010, p15), we *do* do God. In comparison with 54% in Scotland, 57.6% in Wales and 59.4% in England, 82.2% of the NI's population claims Christian affiliation (Cumper & Mawhinney, 2015) and nowhere is this allegiance to religion more obvious than in the education of the province's children and young people.

The connection between education and religion has existed since the formation of the state of NI; it is one that has seen some changes and has been a source of controversy and political contention, but it is nevertheless incontrovertible. Much has been written about it and about its contribution to NI's segregated and polarised society (see, for example, Cairns, 1987; Gallagher, 1995; Hewstone et al, 2005; Richardson & Gallagher, 2011; Smith, 2001), through the emergence of Maintained schools (mainly Roman Catholic) and Controlled schools (perceived to be mainly Protestant).

Whilst there has been research on an inter-sector level, very little has been written from an intra-sector perspective. Although work has been undertaken on the link between the Protestant churches and the Controlled Sector (CS) (Byrne & McKeown, 1998; Armstrong, 2015), there has been little focus on the sector and its ethos.

On 2nd October, 2012 an Education Bill was introduced to the N. Ireland Assembly (NIA). Contained within it was the proposal for a Controlled Schools' Support Council (CSSC). The CSSC was formally established in 2016 and its work is underpinned by a Vision Statement for the ethos of the sector. What is not clear, however, is whose values underpin this vision and how these values reflect those of Controlled schools and their stakeholders.

As someone who has grown up in NI, taught its children, represented and educated its teachers, promoted the link between church and education, and now advocates for Controlled schools, this topic is of great interest. However, beyond a personal level, the issue has implications for schools, schooling and those who are being schooled in NI, especially in a society which is arguably becoming more secular. Therefore, the purpose of this study is to explore the importance of ethos and how it relates to the CS, to investigate the potential impact of the CSSC and its Vision Statement upon this, and to consider the continuing influence of the Protestant churches on a sector designed to cater for those of all faiths and none.

Background

> Any examination of the current education system in Northern Ireland demonstrates that, in spite of the increasing secularisation of society generally, the churches have continued to assert an important and continuing influence and authority.
>
> (Byrne & McKeown, 1998, p322)

In 1972, Cambridge Professor of Education Paul Hirst suggested that education had moved beyond religion, rendering it a nonsense. Yet, religion still plays a major part of the life of education in the UK, with around one third of the total number of maintained schools in England having a, "religious character" (DCSF, 2007, p3). There is no doubt, however, that the issue of faith in education is a controversial matter, raising the question: "should religious beliefs have any place in the educational institutions of a religiously diverse democracy?" (Cooling, 2010, p 12).

Religion has been inextricably intertwined with education in N. Ireland since its creation in 1921. The new state inherited 2042 national, 75 intermediate and 12 model schools (Farren, 1995) which had come to be dominated by the main Roman Catholic (RC) and Protestant churches and in which children were educated, "in schools which were parochially organised, denominationally segregated and clerically managed" (Dunn, 1990, p234). Despite, "their theological differences and mutual detestation" (Buckland, 1981, p77), both shared the view that children should be taught alongside and by those of the same denomination, with religious instruction forming the backbone of the curriculum. They also shared a mutual distrust of the state (Dunn, 1990), not least due to the 1923 Education Act which attempted to provide an integrated primary education system in which religious education was to be forbidden during the school day and a teacher's religious denomination should have no bearing on their appointment. Whilst the Catholic Church opposed the Act in their desire to preserve a distinctive Catholic education and also in a refusal to recognise the new Ministry of Education or the legitimacy of the new N. Ireland government, the Protestant churches opposed it on the grounds that they believed it to envisage a system of education which was secular.

> Of all the institutions in society, the Church has the longest, most consistent interest in education, particularly in terms of schooling. In this it easily antedates governments. Its interest is not only a matter of moral principle and of its own vocation; it is also one of vested interests, of financial commitment and historic privileges. All this has involved it in controversies and power struggles…
>
> (Irish Council of Churches, 1982, p2)

Following the 1924 formation of the United Education Committee (which could be argued to be the original version of the Transferor Representatives' Council discussed below), in 1925 the Protestant churches secured an Amending Act, which removed the ban on non-denominational Bible teaching and required teachers to give religious instruction. The 1930 Act further tightened up the requirement for religious education, allowed the Protestant churches to have a significant say in appointing teachers and gave the transferring bodies 50% representation on school management bodies, "thus acknowledging implicitly the *de facto* Protestant nature of the state education system" (Byrne and McKeown, 1998, p321), a point echoed by Farren (1992), who suggests that the over-turning of 1923 Act sealed the fate of education for the rest of the century as county schools became *de facto* Protestant and, following lobbying from the newly-elected Nationalist MPs, voluntary schools were given enough funding for a parallel Roman Catholic system to exist.

During the 1930s, therefore, the Protestant churches, "bent the system more and more into the shape of a Protestant school system" (Akenson, 1972, p195), winning enough concessions on representation, management committees, appointments and religious instruction (Armstrong, 2009) to be content that the Protestantism which reflected the make-up of the state of N. Ireland was now reflected in its schools (Dunn, 1993) and to transfer approximately 500 schools into state control between 1926 and 1947 (PCI, 2007). None of the Catholic schools were transferred to the state (a position which Akenson (1972) suggests led to the dual system evident today) and the result was a disparity in the levels of funding awarded which, although mitigated in the 1930 and 1947 Education Acts, was not rectified until the late 1960s. The 1947 Act created mandatory post-primary schooling as per the 1944 Butler Act, for the first time alleviating the lack of interaction between the levels of education at the inception of the state (Akenson, 1973), a fact that surely feeds into the lack of a sector-wide identity across the various phases of schooling within the sector today. Following lobbying by the churches over their spiritual leadership of education (Farren, 1992) the Act also gave them seats on the management of some of the new secondary schools. It also increased funding for Catholic schools, removed the right for denominational religious instruction and provided an opt-out for parents, although it did provide

for a daily act of collective worship and the requirement for education authorities to provide religious instruction. The main issue of concern for the Protestant churches, however, was a conscience clause for teachers, which meant that a willingness to provide religious instruction was no longer a pre-requisite for employment: "The Protestants argued that they wanted a non-denominational state system; but they also wanted it to be Protestant with regard to staffing and religious instruction, and to have a curriculum that reflected the British connection in its ethos (a word not much in use then)" (Dunn, 1990, p236).

By that time, "pressures from the churches had created two separate, almost entirely segregated schools systems" (Byrne & McKeown, 1998, p321) with obvious tensions during the 1950's and 60's between the two branches of the Church, seen in blocks to the building of new Catholic schools, the proposal to pay National Insurance contribution to Catholic teachers and transport costs for Catholic pupils (Farren, 1992). In many ways the 1968 Act exacerbated this, in that it, in exchange for accepting public representation onto their school boards, the Catholic schools received an extra level of grant and, as a *quid pro quo*, county schools were re-named Controlled schools and, "the Protestant Churches were given automatic membership rights on the school committees of all controlled schools" (Gallagher, 1998, p3). This ensured that, "the Protestant clergy were successful in twisting the state primary schools into Protestant institutions" (Akenson, 1973, p195) and that, for the first time, it could be argued that the Controlled Sector could be called *de jure* Protestant:

> The Act also afforded the Protestant Churches rights to representation in any new schools built by local authorities. In effect this extended the historical rights of Transferors beyond the schools they had previously owned to all state controlled schools. Thus a system of separate schools was underpinned… and this continues to be the predominant pattern of provision to the present day.
>
> (Smith, 2001, p563)

The restructuring of local government services in 1972 led to the introduction of five Education and Library Boards (ELBs), on which, for the first time, the churches sat together at the level of the local education authority. Both *Trustees* (the Catholic school authorities) and *Transferors* (representatives of the three main Protestant denominations: Presbyterian Church in Ireland (PCI); Church of Ireland (CoI); and Methodist Church in Ireland (MCI)) were represented on the ELBs, with Transferors also able to nominate to the ELBs' Teacher Appointments Committees, which appointed principals and vice-principals to state schools. Following the Astin Report on school management and governance (DENI, 1979), each school was granted its own board of governors, albeit with church representation somewhat reduced to allow for the involvement of teacher and parent representatives. This, "'dilution' of their representation" (ICC, 1982, p11) was strongly opposed, as, "any unilateral alteration by the Government of the principles as accepted in 1930 would create a violation of good faith and a breach of trust" (PCI, 1978, p193).

The result in N. Ireland was three main sectors: state *Controlled* schools attended mainly by Protestant pupils, owned and funded by the ELBs; voluntary *Maintained* schools attended by mainly Roman Catholic pupils, owned by the Catholic church and funded by the ELBs and the Department of Education for N. Ireland (DENI (from 2012 known as DE)); and *Voluntary Grammar* schools, largely split on denominational grounds, with a degree of financial and management autonomy, but funded by DENI. A fourth group has emerged since 1989 in the form of the grant-maintained *Integrated* sector (IS), with a religious mix of pupils and funded by DENI, and a small Irish Medium Education sector (IMES) has existed since 1998.

Catholic Council for Maintained Schools

The Astin Report noted the difficulties in the outworking of its proposals in the Maintained Sector (MS), due to the lack of a coordinating structure above individual management boards in schools, and advised that a bureaucratic layer was needed to liaise with DENI. In 1989 there was a recognition, "that the Catholic schools' system was a distinctive element requiring unique treatment" (McGrath, 2000, p196), resulting in the creation of the Council for Catholic Maintained Schools (CCMS), "to provide for a more co-ordinated 'voice' for the Catholic church in educational administration… [and as] a central employing authority for teachers in the Catholic maintained sector" (Byrne & McKeown, 1998, p324). As the new employer, CCMS took upon itself the functions of individual schools in this regard, advising schools on matters of employment and sitting on panels to appoint principals and vice-principals. It supports effective school management, offering advice and issuing policies.

Since its inception, it has surpassed its statutory responsibilities, growing in credibility within the Maintained Sector and in influence in the wider educational community. One of the main reasons for this has been its advocacy role, along with its determination to exercise its rights to be consulted and its tireless campaigning for equity with the CS, through various formal and informal channels, in which, "CCMS is now an accepted player" (ibid, p329).

As McGrath (2000, p233) notes, the CCMS, "has attracted the envy of many Protestant clerics". Its influence, "stands in contrast to the position of the Protestant churches, whose formal channels to articulate their specific concerns have not increased beyond their representation on school boards of governors and on the ELBs" (Byrne & McKeown, 1998, p239). Donnelly (1997) attests to this, citing the diminution of the Protestant churches' influence at governing body level as a further example of perceived inequity. The exclusion of the churches from representation on the N. Ireland Council for Integrated Education (NICIE) ensured that the Protestant churches were beginning to feel 'left out in the cold', perceiving as unjust and inequitable the lack of any central co-ordinating body which would articulate and maintain Protestant interests (McKelvey, 1993). The call for such a body was rejected on the grounds that Controlled schools are non-denominational and publicly funded.

Transferor Representatives' Council

This rejection led to the re-forming, in 1994, of the Transferor Representatives' Council (TRC), which is the main policy-making body for the three main Protestant churches, articulating their policy positions and lobbying government and others. Yet, the TRC is peopled almost exclusively by clergy or lay volunteers, ensuring that it has been, "vastly under-resourced and does not have the capacity to adequately represent the views of the Controlled Sector" (CoI, 2006, p290). In addition to responding to consultations, meeting politicians and supporting Transferor governors, the organisation continued to lobby for a support body for the CS, because it, "has not had a voice; it has not had that coherence… [or] affirmation that other sectors have had" (NIA, 2012, p2).

In 2002, NI's devolved Executive initiated a Review of Public Administration, with a plan to bring all of the disparate aspects of educational administration under a single Education and Skills Authority (ESA). The churches responded to the various consultations, with particular points of concern for the Protestants being, "employment and ethos; ownership and governance of schools; the future planning of the schools' estate and their rights to nominate to the ESA Board" (Armstrong, 2015, p6). Armstrong notes that the churches' education reports from 2005 until the present testify to the energy expended

in attempts to, "protect, secure and enhance the historic links between the Protestant churches and schools" (p10).

Despite this, they took some losses in proposed new governance arrangements and also felt a growing pressure on historic rights, with changes in terminology being adopted by DENI: "publicly-owned schools" (DENI, 2006, p20) in preference to 'Controlled schools'; an assertion that 'transferred schools' are actually a sub-set of Controlled schools; and that the TRC is the, "voice for transferred schools within the Controlled Sector" (ibid). The greatest blow, however, was the proposed removal of governance rights on schools which had come into existence after the transfer of church schools to the state, which would result in the removal of the, "Christian ethos as of right from the Controlled Sector" (PCI, 2008, p229). This was compounded with the proposal that the ESA Board would not include TRC representation, despite the Catholic Church still enjoying existing levels of representation throughout the entire Maintained Sector.

In a mirror of what had happened in the late twentieth century, it became the TRC, rather than CCMS, which was calling for parity between the sectors. Yet, in a further example of intensive lobbying, within the space of three years the Assembly made a reversal in its proposals over Transferor governance, leaving the door open for the churches to re-focus their energies on a sectoral support body and on representation on the ESA Board. The latter was settled after the 2011 Assembly elections, with 4 of the 20 seats going to the Catholic church and 4 to the Protestant churches, thus ensuring, "a significant voice for the Christian faith in the future system of education in NI" (PCI, 2012, p202). This was accompanied by agreement to set up a Controlled Schools' Support Body Working Group (CSSBWG), funded by DENI.

In 2014, after 10 years and c£20m, the Education Minister abandoned future work on ESA, instead merging the five ELBs to form the Education Authority (EA). In parallel with this, the Protestant churches continued the lobbying and preparation for the new sectoral body, the Controlled schools' Support Council (CSSC).

Controlled Schools' Support Council

Following an initial meeting of parties interested in the establishment of a Controlled Sector sectoral support body in November 2007, an original CSSBWG created work strands around Vision and Ethos; Representation; Communications; and Business Planning. The Chair, Vice-Chair and Secretary (respectively Hugh McCarthy, a post-primary principal; Rev Trevor Gribben, PCI Education Secretary; and Rev Ian Ellis, CoI Education Secretary) created a Vision and Ethos discussion paper, which considered the values of the sector and presented the first iteration of a Vision Statement (VS) which would encapsulate an ethos for it. This was sent out for consultation to all those who had attended the initial meeting, to all the Southern ELB principals and the CEOs of CCMS and NICIE, and the draft paper was passed at a further meeting.

Following the political turmoil surrounding the establishment of ESA, momentum on the body halted and so, in 2012, the two Education Secretaries approached DE. Learning lessons from the somewhat *ad hoc* approach of the original group, they suggested that it would be officially re-formed as a Ministerial Working Group through the seeking of official nominees from stakeholders such as the TRC.

With the new CSSBWG in place, the work on ethos began again apace. The ethos paper was re-worked by CoI Education Secretary, Rev Dr Ian Ellis, resulting in the second iteration of the Vision Statement,

which was discussed at the WG and approved as a basis for consultation with the sector. Ellis spoke to the ethos element of a presentation to the NIA Education Committee on 12.12.12 and at road-show presentations in each of the ELB areas in January and February 2013, to which each Controlled Sector principal and chair was invited. Attendees were invited to respond and the document was formally adopted by the WG, with this third iteration reading: *"The CSSC supports Controlled schools in providing high-quality education for children and young people to enable them to learn, develop and grow together within the values of a non-denominational Christian environment."*

The CSSC formally came into existence on 1st September, 2016. Funded by the DE, it was set the ambitious target of having a 60% opt-in from Controlled schools by December of that year; by October 2016, over 90% of eligible schools had joined (Mulholland, 2017). Running on a budget of c£1m, with a staff of 18, CSSC formally launched on 8th March, 2017 with its first AGM attended by representatives from constituent schools and other stakeholders. At this event, its first Board of Directors was elected, comprising 2 primary, 2 post-primary, 1 nursery and 1 special school representatives, along with 3 members of the TRC and 4 individuals appointed by the Foundation Directors (FDs). At its first Board (or Council) meeting, the Board elected as its Chair one of the FDs appointees and as its Vice-Chair one of the TRC representatives. The Council meets monthly, with its three Committees (Education and Research; Audit; Finance and General Purposes) meeting bi-monthly.

The remit of the CSSC is to work, "in partnership with" DE, EA, other sectoral bodies and schools (CSSC, 2017) and to focus on advocacy, governance, raising standards, area planning of the schools' estate, and, "to develop and maintain the ethos of the Controlled Sector" (ibid), a point elaborated upon in the section 'Role of the CSSC' in the original CSSC Application for Grant (my emphases):

- "develop, with the Sector, a shared *collective ethos*
- Work with schools to develop and maintain *the* ethos of the Sector
- Provide advice and guidance to the Controlled Sector on *the* ethos of controlled education."

Byrne & McKeown (1998, p334) suggest that much of the work of the Protestant churches in education has been, "driven by the desire to protect the ethos of the Controlled Sector". This raises a central paradox: if the churches desire to protect <u>the</u> ethos of the sector, yet one of the jobs of the CSSC is to *develop* and maintain <u>an</u> ethos, then does the Controlled Sector have an ethos?

The Ethos of the Controlled Sector

In her study of school ethos in NI, Donnelly selected a Maintained and Integrated school because of, "the distinctiveness of their ethos" (2000, p138). The implication of this statement is that, if the ethos of the Maintained and Integrated sectors are distinctive and much time is spent in articulating them, does the opposite apply to the CS? Hughes (2011, p835) believes so, and bemoans, "the relative paucity of qualitative studies" of the Controlled Sector. If the ethos of the Maintained Sector is for schools to be part of a whole which includes church and the home (Brady, 1982) and that of the Integrated Sector to give equal recognition to the two main Christian traditions (NICIE, Statement of Principles Charter), what exactly is the ethos of Controlled schools? According to DENI (2006, p2) the Controlled Sector lacks, "the sense of shared identity and ownership that is evident in other sectors" and Byrne & McKeown (1998) quote a DENI official, who stated, "…there are divergent views on what a controlled school is… it is a state school and open to anybody… atheists, Jews, Catholics and anybody who wants to attend them" (p337).

It would appear that the ethos to which the Protestant churches aspire is connected to Christian teaching (PCI, 2008), with, "the onus for teaching God's word… falling on the day school teacher" (PCI, 1999, p222). The churches' vehicle for this is quite clearly through the delivery of collective worship and Religious Education (RE) (PCI, 2000; CoI, 2003), based on Article 21 of the 1986 Education and Libraries (N Ireland) Order which states that it is based upon, "the Holy Scriptures", with the 1989 Education Act removing any mention of 'religious instruction' and replacing it with 'religious education'. Yet surely one subject area does not an ethos make, a point borne out by Donnelly (2000, p141), quoting a teacher who has worked in both sectors: "…in the non-Catholic school where I taught before, religion was set into a period of the day, but in a Catholic school it is different: it permeates the whole day – in the teaching and the discipline."

There is no doubt that the issue of the ethos of the Controlled Sector is contested and has been since the creation of the state. The desire of Lord Londonderry, through the 1923 Act, was for the State to control education, undermining the churches' values, which, "could and would be at risk if education was to be left completely in the hands of the State" (Gallagher, 1978, p42). The political manoeuvrings of Church and State between the 1923 and 1930 Acts, and the gap between a *de facto* and a possible *de jure* status between the 1930 and 1968 Acts has created, "the somewhat ambiguous status" (Hughes, 2011, p835) which has existed until today. The Controlled Sector does not have the defined clarity of the other sectors; until recently, it did not have a clear voice to articulate it, such as CCMS or NICIE; and its main stakeholders are in complete contradiction with each other. Whilst the Protestant churches talk of schools which are church-related and have a Christian ethos, the schools themselves, "have been equivocal" in asserting the nature of their status (ibid) and the government states quite firmly, "The Controlled Sector does not at present have an identifiable ethos nor as yet a body to represent their sector" (NIA, 2009, p1), pointing to the Local Management of Schools regulations, which state that each Controlled school is responsible for creating its own ethos. As the body referred to now exists, it could be construed that this 'identifiable ethos' will follow as a consequence.

Who influences ethos?

Given this, it is important to consider who it is that influences the ethos of the CS, especially as the responsibility for it may be taken out of the hands of individual schools. The significance of this question is rooted in the contestation which has been ongoing since the formation of the state of NI; a contestation over, not just influence over the ethos of the sector, but over the sector itself. This contestation has manifested itself in political manoeuvring by state and church, which perceived attempts to diminish its influence, through the churches' lobbying of politicians and, ultimately, through the creation of the CSSC, whose very existence has seen further tensions emerge within the educational landscape.

The budgetary control by the DE and a protectionism of functions from the Education Authority has ensured a less than warm welcome for the CSSC, yet the rate of affiliation suggests a real demand for the organisation. So was this flurry to join an overwhelming desire for each of the 558 Controlled schools (CSSC, 2017) to have a single ethos, believing that their ethos was inadequate and that there was a need for all 558 of them to be 'singing from the same hymn sheet'?

Indeed, is the 'ethos' element of CSSC's work of intrinsic importance to Controlled schools? If not, why is it in the remit, who ensured it was there, and for what purpose? Is it, in fact, of *any* concern to Controlled schools at all, or was their joining CSSC because of something else: perhaps disgruntlement

with the education system, a feeling of not being listened to, the desire for a body that will 'go in to bat' on their behalves, or their concerns over initiative- and policy-overload?

Additionally, what does this mean for those who are the consumers of the Controlled Sector; the pupils and parents? Dunn (2001, p568) suggests that, "The differences between religious denomination and church attendance figures in the Census statistics also suggest that there are many parents within Northern Ireland who subscribe to Christian values and beliefs but do not practice their religion through regular collective worship." Whilst Controlled schools may have a, "Protestant character" (Barnes, 2007, p232) or they might be referred to by the TRC as 'church-related schools', they are open to those of all faiths and none. How comfortable, therefore, do parents feel in sending their children to a school system which has come to be regarded as faith-based and church-related; and how comfortable will they be with any potential 'formalising' of this?

The connection between ethos and policy

In looking at the 'who' it would appear that all of the key actors in education are 'policy' bodies in some form or other:
- Politicians decide the direction of education – they **create** education policy;
- DE implements the wishes of politicians – it **enforces** education policy;
- Schools put policy into practice – they **enact** education policy;
- TRC responds to and **influences** education policy;
- CSSC **contributes** (to borrow a phrase from CCMS (closest comparator)) to education policy;

If all of these bodies are essentially intrinsically tied up with educational policy and all of these bodies have an interest in and position on ethos, then does it follow that there is a connection between policy and ethos? Does the whole process of creating, interpreting, translating and enacting policy enable us to better understand the process of creating, interpreting, translating and enacting ethos?

This connection between policy and ethos will form an important part of this study, which will therefore look at ethos *through the lens of policy*. Viewing the CSSC's Vision Statement as a policy initiative, it will consider the practicalities and potential impact of it upon the ethos of the CS, investigating its creation and how it might be interpreted by stakeholders, and translated and enacted at school level.

Kenway (1990) suggests that the three questions which need to be addressed in the analysis of policy are the questions of what, how and why, with Taylor et al (1997, p39) adding an additional, "why now … [and]… what are the consequences", or, "what now" (Gale, 1999, p398). In deference to Aristotle, who is attributed both with the conceptualisation of ethos within rhetoric and as being the originator of the *Septem Circumstantiae* or elements of circumstance, this study will be based around such interrogative words and will focus on three central areas, comprising the study's Research Questions and Sub-Questions:

1. The 'what': **What is ethos and how does it pertain to the Controlled Sector?**
   - What is ethos?
   - What are the qualities and attributes of the CS?
   - What is the current ethos of the CS?

2. The 'who': **Who influences the ethos of the Controlled Sector?**

- Is the CSSC a necessary step for the CS?
- Whose values are being espoused in the CSSC's Vision Statement?
- What is the ongoing role of the Protestant Churches in the CS?

3. The 'why': **Why might a single ethos be of importance?**
   - Why a single Controlled Sector ethos is or is not important?
   - Why the Vision Statement is or is not an appropriate basis for a single Controlled Sector ethos?
     - How might schools receive, translate, interpret and enact the Vision Statement?
     - What are the social justice implications of the Vision Statement?

As the study of ethos will be undertaken through the lens of policy the following Research Question will also be addressed:

4. **What is the connection between ethos and policy?**

The first chapter will consider the body of literature on both ethos and policy, looking at the 'what', 'why', 'who' and 'words' of both to ascertain what connection exists between the two concepts and what can be learned about ethos through the lens of policy.

The second chapter will look at the 'how', considering how policy is viewed and analysed, using this as a methodological approach for how the empirical research into ethos was carried out.

The third chapter will address the 'who thought what', presenting the findings of the research accumulated through the data-collection process.

The fourth chapter will consider the 'what does this mean', discussing what the data has to say in respect to the extant literature and how it contributes towards answering the research questions.

The final chapter will consider the 'so what', concluding what has been found out, how this adds to the body of knowledge on ethos in general, and the particular consequences for the Controlled Sector.

Literature Review

The what

The problem with the what

> Ethos is a fashionable but nebulous term often employed by organisational theorists, educationists and theologists to describe the distinctive range of values and beliefs, which define the philosophy or atmosphere of an organisation.
>
> (Donnelly, 2000, p134)

Murray (2000) suggests the, "notion of a 'conscious ethos' is an oxymoron" (p16). In education, as elsewhere, the concept is just as difficult to define (McLaughlin, 2005) and, indeed, "highly resistant to a satisfactory definition" (Graham, 2012, p342). Perhaps this is, "partly because we are not quite sure what we want it to mean. It's all rather like handling a piece of mercury" (Clarke, 2000, p165).

Likewise, Nudzor (2009, p85) suggests that the term 'policy', "is elusive owing to the very many different ways that it is used to refer to a highly diverse set of phenomena." Echoing Ozga (1990), Ball (1993) opines that 'policy' is used, "to describe very different 'things' at different points in the same study" (p10), with Harman (1984) using a country's foreign policy, a city's parking policy and a shop's returns policy to exemplify the varied nature of the concept.

Donnelly (2000) argues that the whole idea of schools having an ethos that is unique is simplistic, "mainly because the process of ethos is not static and operates on a number of levels… leading to contradictions and inconsistencies" (p152). Nonetheless, as Strivens (1985) suggested, it is a concept which is too important to be ignored.

The importance of the what

> The general agreement that school ethos is important belies how little is known about it and… Further studies aimed at a deeper understanding of the meaning of school ethos are needed…
>
> (Graham, 2012, p342)

According to McLaughlin (2005), the importance of ethos to education is widely acknowledged, but, "a more detailed and precise focus upon the notion of ethos itself and its educative importance" is needed (pp306&307). Any understanding of educative influence is, he argues, incomplete in the absence of an understanding of ethos. Policy, "is about progress, it is about moving from the inadequacies of the present to some future state of perfection where everything works well and works as it should" (Ball, 2013, p9). Likewise, the concept of school ethos is usually credited to Rutter et al (1979) (see, for example, Stratford, 1990; Hargreaves, 1995; Graham, 2012) and used by them in the context of school effectiveness and improvement.

Ethos can explain, "why schools react in different ways to policy initiatives" (Donnelly, 2000, p152), "how the observed practices and behaviour of school members support and foster the official ethos which is promoted in school documentary sources" (p135), and, "what it can reveal about social process, activity and structure" (p135). However, ethos is not simply about structures, but about people, collectively and individually. McLaughlin (2005) acknowledges this when he suggests that ethos has a close relationship with an Aristotelian vision of education as, "the shaping of the

dispositions, virtues, character and practical judgment of persons in a milieu in which tradition, habit and emulation play an important role" (p306).

Policy can be defined as an intervention to deal with a specific problem (Shulock, 1999; Kogan, 1975; Jennings, 1977), a formal statement of intent (Kogan, 1975; Harman, 1984; Gallagher, 1992), an official statement of actions to be followed (Nakamura and Smallwood, 1980; Harman, 1984; Codd, 1988), a tangible outcome of discussion (Jennings, 1997), an alternative to current practice (Weiss, 1982), and can be either an event, a guide or a thing (Nudzor, 2009). McGuinness (2000, p243), however, suggests that it is unlikely that there will be similar agreement on such definitions of ethos and believes that this is as a consequence of each institution having a character and traditions that are unique. What he does state with certainty, however, is the significance of ethos in shaping the policies and practices of each organisation and the central role of ethos in creating, "the foundation upon which all work in education should be based."

The confusion over the what

McGuinness has a valid argument, of course, but one of the problems with this view is that, although ethos lays the foundation, it is the very multiplicity of activities within an educational setting which can render ethos intangible and elusive (McLaughlin, 2005). McLaughlin suggests that this is one of two main reasons for making ethos so difficult to analyse, the other being that, "the concept of ethos is closely akin to, and often described in terms of, related notions such as 'ambience', 'atmosphere', climate', 'culture', 'ethical environment' and the like" (2005, p308).

As with Nudzor's (2009) identification of the range of different ways that policy is referred to, this confusion of ethos with other terms has been identified by a range of theorists (see, for example, Reid, Hopkins and Holly, 1987; Nias et al, 1989; Allder, 1993; Donnelly 2000; Mullan, 2000; Glover and Coleman, 2005; Haydon, 2007; Solvason, 2005). Prosser (1999) suggests that such terms as 'climate', 'ethos', 'atmosphere', 'tone', 'character' and 'culture' have been employed with a degree of analytical laxity. Lambkin (2000, p91) also considers that, "'mission', 'identity' and 'ethos' are frequently encountered in the same context, and one of the many things which make talk about 'ethos' difficult is understanding how, if at all, they differ from each other." Solvason (2005) adds to the list by including 'spirit', 'ambience', 'feeling' and 'character' (p85) and stating that the terms are used, "without appropriate definition" (ibid).

Solvason contends that, in both the studies of Rutter et al (1979) and Donnelly (2000), the use of ethos actually refers to 'culture', with Prosser (1999) suggesting that the two terms can be used interchangeably. Glover and Coleman (2005) found that this interchangeability applied in the main to the three terms of 'ethos', 'culture' and 'climate' with a tendency for each to be used differently in different countries: in the United States and Australasia, climate is used to describe the school environment; in Europe culture is more prevalent; and, in general, ethos – instead of, or as part of culture - is used to refer to social dynamics. Prosser (1999) states that quantitative researchers prefer the use of the term 'climate', whereas qualitative students opt for 'ethos', 'atmosphere', 'tone', or 'culture'. McLaughlin (2005) proposes that, "Researchers more interested in empirical research may favour concepts such as 'culture', whilst those with a focus of interest beyond the school, such as Haydon, may favour terms such as 'environment'" (p310).

By far the most blurred distinction (Green, 2009) is between ethos and culture; indeed, one of the foremost conferences on the issue of ethos (Marino Institute, Dublin, 2000) was entitled *The School*

Culture and Ethos Conference. Williams (2000) believes that the difference between the two is slight, "but there is usually something more self-conscious about an ethos than a culture" (p74). Solvason (2005, p87) suggests that, "school culture is a tangible entity, whereas ethos is far more nebulous, always retaining a vagueness… we recognise and comprehend the school culture, whereas we experience the ethos."

Culture

Culture is a, "slippery concept" (McMahon, 2001, p126), which must be felt (Handy, 1981) lest, "a rigorous definition might destroy the flavour" (ibid, p185) of its, "Inherited recipes for understanding and acting in the world" (Luckmann, 1966, in Furlong, 2000, p61). It is the total of the, "inherited ideas, beliefs, values and knowledge which constitutes the shared bases of social action" (Handy and Aiken, 1985, p87), the, "interweaving of the individual into a community… that distinguishes members of one known group from another" (Ogbonna, 1993, p42), the mechanism for maintaining the status quo (Nias et al, 1989) with Deal and Peterson (1999, pp2-3) suggesting it is a, "school's own unwritten rules and traditions, norms and expectations that seem to permeate everything".

In essence, culture is the underlying beliefs of an organisation (Furlong, 2000; Torrington and Weightman, 1989; Solvason, 2005)), the basis for every-day school life (Solvason, 2005), "the way we do things around here" (Deal and Kennedy, 1983, p14), the glue which binds people together (Furlong, 2000), "how organisations work when no one is looking" (Hyland, 2000, p22), "a constellation of both written and unwritten expectations, values, norms, rules, laws, artefacts, rituals and behaviours that permeate a society and influence how people behave socially" (Ebbutt, 2002, p. 125), and, "the underground stream of norms, values, beliefs, traditions, and rituals that has built up over time as people work together, solve problems, and confront challenges" (Deal and Peterson, 1999, pp2-3). It is unseen, unobservable, yet concrete and unifying, providing, "meaning, direction, and mobilisation for school members" (Prosser, 1999, p13).

Rooted in history and subject to economic, social and political pressures (Furlong, 2000), culture is about relationships (Solvason, 2005) and shared values, meanings and understandings (Angus, 1998). These unify the culture to the extent that it becomes an accepted norm, which barely needs articulation, except to those who join the organisation, as, "they become socialised into conforming to the shared language, values, beliefs and norms" (Furlong, 2000, p62).

The link between culture and successful school improvement (Hopkins, 1994; Furlong, 2000) leads to the view that culture is much more to do with processes (Higgins-D'Alessandro and Sadh, 1997), identifiable elements and structures (Furlong, 2000) than climate or ethos (Glover and Coleman, 2005). Whilst culture may be measurable (Glover and Coleman, 2005), it, "transcends the measurability of climate and is more diffuse than the analysis of limited relationships that characterise the use of the term ethos" (p265).

Climate

Glover and Coleman (2005) suggest that climate is, "a set of objective descriptors" (p256) concerned with the factors which affect the outcomes of students and how those factors are measured. Kuperminc et al (2001), in considering the first of these, looked at how open relationships fostered better behaviour, leading to a more positive climate. They also focused on the social climate as the foundation for how pupils react to situations, an element previously determined by Moos (1979) as a key indicator of climate. He proposed that the social environment or atmosphere was made up of

relationships; personal development, growth and aspiration; and how the school system is maintained or changed.

The relationship aspect noted by Moos was echoed by Dellar (1998), although, whilst Moos focussed on pupil outcomes, Dellar's work was more to do with the impact of teachers. He cited the role of professional development and the attitudes of management to teachers as being a vital part of the climate created for implementing policy; Mortimore et al (1988) allude to this when considering the importance of teachers' working conditions. Dellar developed a number of measuring scales to consider how the relationships of teachers contributed to pupil outcomes, such as their level of commitment, involvement, decision-making, autonomy and response to change (1998). Smith (1998) suggests that these relationships are integral to the climate of the school and opines that it is the top-down nature (teachers to pupils; principal to teachers) which creates the climate.

In essence, climate describes, "those factors affecting the macro-environment within which the school functions" (Glover and Coleman, 2005, p255).

Environment

Glover and Coleman's use of the term macro-environment leads neatly into a very brief look at the concept of environment, which appears to be very clearly linked to climate. Stockard and Mayberry (1992) believe that climate (student achievement) begins with the environment within which pupils and teachers undertake their work. Glover and Coleman suggest that this environment is indicated by, "group trust, openness, cooperation and atmosphere, the sense of mission, parental involvement, teaching, discipline, assessment of time on task, instructional leadership and expectations" (2005, p255).

The term is usually aligned with a descriptor to give it meaning, such as learning environment, educational environment, working environment (Glover and Coleman, 2005), school environment (Graham, 2012), healthy/unhealthy environment (Frieberg, 1999), ethical environment (Haydon, 2006). Glover and Coleman (2005, p256) contend that, when considering environment, the, "emphasis is also rather more on the factors affecting the learning environment within the classroom, rather than the general atmosphere of the school."

Atmosphere

So what then constitutes this 'general atmosphere'? The influential Elton Report (Elton, 1989) talks of schools having different atmospheres and considers how the "feel" of a school (p88), or a positive or negative atmosphere can make a significant impact upon pupils' behaviour and attainment. Schools with a positive atmosphere are those which know and value its pupils as members of the school community, a point elaborated upon by Mortimore et al (1988) who talk of a pleasant atmosphere in effective schools. This manifests itself in interest in the whole child through emphasising praise, reward, self-control and positivity, rather than tight, negative control. This is encapsulated in the findings of Smith (1995, p30): "the atmosphere of any school is greatly influenced by the degree to which it functions as a coherent whole, with agreed ways of doing things that are consistent and which have the support of the staff."

Identity, Mission and Spirit

Another term which is often used in tandem with ethos is identity. De Wolff (2000) suggests that school identity is what the outstanding features of a school are, what the members of it share and have in common; essentially, "what makes a school this school" (p53). Bakker and ter Avest (2005) share this

view and suggest that identity focusses on the institution, its staff and context. Lambkin (2000, p191) agrees with this, suggesting that *mission* refers to, "what the school is trying to do", whereas *identity* is, "what connects it with some schools and marks it apart from others." This is closely linked with the idea of school spirit, which is often, "determined by the cultural, educational, moral, religious, social, linguistic and spiritual values and traditions which inform and are characteristic of the objectives and conduct of the school" (Williams, 2000, p75).

Values

The term 'values' used above is often substituted for, or a key part of the notion of ethos. McGuinness (2000, p246) suggests that, "Ethos… is manifested in the values we treasure and promote," Monahan (2000) believes that, "ethos is an expression of the values of the school" (pxxii), while Mulcahy (2000, p86) asserts that culture and ethos are, "viewed as elements of values in education." Boldt contends that, "Ethos is the expression of the school's core values which determine its character and guide the daily life and direction of the school" (2000, p42) and McLaughlin (2005, p310) understands ethos as, "relating to the core values of the school and to that which is deep and fundamental in its life and work."

(Hill, 1991, p3) suggests that values is, "a vague and woolly notion" and definition, "may include references to moral, spiritual, aesthetic and intellectual values" (Mulcahy, 2000, p85). Mulcahy believes that values are reflected in a school's mission statement as a declaration of how the school functions as an organisation (Glover and Coleman, 2005), or a, "framework which guides our actions and relationships on a day-to-day basis" (Coolahan, 2000, p120). In essence, "values… operationalise the ethos" (Green, 2009, p198).

Glover and Coleman (2005) believe that the most successful schools, "have a clearly stated set of values that are… fundamental to policy and practice" (p259). This link to policy is also mentioned by Smith (1995) when he states that schools' aims should be in policy documents which contain the schools' values and statements of intent. He suggests clearly identifying the 'state' of the school, as does Mulcahy (2000, p86) in order to examine how the, "espoused values are reflected in school policies."

Schools need to be, "clear on what values they are transmitting to their students" (ibid, p84); these values must permeate the entire life of the school rather than being confined to a single class or teacher, in order to provide, "a major steadying point for many young people at very formative stages of their lives" (Coolahan, 2000, p114). Ultimately this will, "turn out better citizens, who will uphold the moral fibre of the state and in turn transmit these values to society in general" (Mulcahy, 2000, p84). However, he also opines (p87) that:

> ...stating the values merely identifies the direction by outlining the goal. In significant part the journey remains to be made and the route of that journey is in turn influenced by many factors, not least the ethos of the individual school.

Towards a definition of the what

The common usage of the word ethos in public life is attributed to Aristotle, who employed it as one of three modes of public appeal: *logos* appeals to an audience through the logic of an argument, *pathos* through the emotion and *ethos* through the authority, character, credibility or trustworthiness of the speaker (Brahnam, 2008; Graham, 2012; Halloran, 1982; Smith, 2004), essentially saying, "Believe me because I am the sort of person whose word you can believe" (Halloran, 1982, p60). It requires speakers to understand their audience, to identify with them in order for listeners to view

speakers with trust (Graham, 2012); "the wise speaker will construct his speech with an eye toward the sort of character it portrays" (Halloran, 1982, p60).

> A good starting point for an exploration of the notion of ethos is Margaret Allder's claim that 'ethos' is a 'frontier word' in virtue of its closeness to the edges of linguistic expressibility. 'Ethos' is rendered intelligible in her view by 'connecting words' (such as 'ambience', 'spirit', 'atmosphere' and 'climate') which have clearer meanings and which, by lending some of their meaning to the notion of 'ethos', enable the meaning of 'ethos' itself to be illuminated and discerned (Allder, 1993).'"
>
> (McLaughlin, 2005, p309).

Barr (2000, p131) believes that, "...'ethos' as a word on its own is meaningless. It must be qualified in some way." In the reading for this chapter, this became quickly apparent, with almost forty phrases identified in the body of literature studied in which 'ethos' was either preceded by, or 'ethos of' was followed by a descriptor:

"...appropriate ethos..." (Barr, 2000, p137); "...aspirational ethos..." (Donnelly, 2000, p152); "…Catholic ethos…" (Hagan, 2016, p111); "...a changing ethos..." (Clarke, 2000, p167); "…Christian ethos…" (Green, 2014; Cooling and Green, 2009); "…clearly defined ethos…" (Smith, 1995, p34); "…distinctive ethos…" (Clarke, 2000, p167; Pike, 2008, p34); "…effective ethos…" (Smith, 1995, p27); "…experienced ethos…" (McLaughlin, 2005, p312); "…imposed ethos…" (McLaughlin, 2005, p313); "...inclusive and democratic ethos..." (Donnelly, 2000, p146); "…intended ethos…" (McLaughlin, 2005, p312); "…liberal ethos…" (Pike, 2008, p7); "…negative ethos…" (Graham, 2012, p352); "…open and trusting ethos…" (Glover and Coleman, 2005, p259); "…positive ethos…" (Graham, 2012, p342; Smith, 1995, p28; McLaughlin, 2005, p307); "...positive and enriching ethos..." (McGuinness, 2000, p245); "...religious ethos..." (Clarke, 2000, p165; Donnelly, 2000, p142); "…secular ethos…" (Pike, 2008, p7); "…welcoming ethos…" (Smith, 1995, p35).

"...ethos of accomplishment..." (Barr, 2000, p136); "...ethos of achievement..." (Barr, 2000, p136; Graham, 2012, p348); "...ethos of aspiration and high achievement..." (Graham, 2012, p342); "…ethos of indignation…" (Hogan, 1984, p702); "...ethos of integration..." (Donnelly, 2000, p146); "...ethos of inward attachment..." (p152); "...ethos of outward attachment..." (p152); "...ethos of parental involvement..." (p147); "…ethos of teaching and schooling…" (McLaughlin, 2005, p307); "...ethos of tolerance, pluralism, openness and transparency..." (Mulcahy, 2000, p90); "…ethos of warm relationships…" (McLaughlin, 2005, p314).

McLaughlin (2005) suggests that, through the use of these connecting words, Allder (1993) has concluded that ethos is about how humans act and behave within their environments, now and in the past, about the social system and moods within these environments, about interactions and consequences, about an experienced norm and about something which is unique to the context. It is the, "unique pervasive atmosphere or mood of the organisation" (Allder, 1993, p69).

> At the most general level, an ethos can be regarded as the prevalent or characteristic tone, spirit or sentiment informing an identifiable entity involving human life and interaction (a 'human environment' in the broadest sense) such as a nation, a community, an age, a literature, an institution, an event and so forth
>
> (McLaughlin, 2005, p311)

Pointing again to ancient Greece, Halloran (1982, p60) further clarifies the concept by stating that ethos is about the collective rather than the individual, "the conventional rather than the idiosyncratic, the public rather than the private." The Greek meaning which most closely resembled ethos referred to 'a habitual gathering place' conjuring up images of people together, sharing ideas. He suggests that this is what ethos really means – the manifestation of, "the virtues most valued by the culture to and for which one speaks" (ibid).

Williams reinforces and also clarifies this, suggesting that, whilst it isn't about one person, nor is it about all people, but rather, "Usually when people speak of ethos they are thinking of medium scale institutions rather than of families or of whole societies... political parties, hospitals, sports bodies or trade unions" (2000, p75)... or, indeed, schools.

School ethos

> Of all the ritual acts by which our culture expresses and shapes its ethos, schooling is surely one of the most subtle and powerful. By the way we structure the curriculum and the way we arrange the furniture in our classrooms, by the clothing we wear at school and the books we select for our courses - by these and the countless other choices we make, the world in which our students gather together is defined. This is why the concept of ethos is important.
>
> (Halloran, 1982, p63).

Burden and Hornby (1989) believe that that those who wish to promote school effectiveness need to consider school ethos, because it is, "the motor, the driving force of what happens in the school" (Coolahan, 2000, p113), its, "heart and soul" (Frielberg, 1999, p1). Hyland (2000) asserts that ethos can be seen in the every-day practices of schools; it is, "la philosophie de l'ecole" (Williams, 2000, p75), the, "unique traits of schools" (Mullan, 2000, p214), the, "set of values, attitudes and behaviours which will become characteristic of the school as a whole" (Smith, 1998, p3).

School ethos is, "the *product* of the culture of the school" (Solvason, 2005, p85), the, "lived reality of the values of the school" (Monahan, 2000, pxxi), the implementation of its mission and the expression of its identity (Lambkin, 2000), the "interface of school culture and climate with pupils' experiences of their school" (Smith, 2003, p468).

School ethos comes about, according to Smith (2003), through the mix of pupils and the attitudes which they bring to the school, and through the formal expressions of the school's aims and objectives; these formal and informal expressions then reflect, "the prevailing cultural norms, assumptions and beliefs" (Donnelly, 2000, p137). "School ethos is constructed through an interaction between the culture mix of teachers, pupils, parents, the local community and the school's official values system mediated through organisational structures and processes and also by staff culture, climate and competence" (Smith, 1995, p24).

It encompasses, "beliefs, values, traditions, aspirations and goals" (Hyland, 2000, p22) and manifests itself through, "the actual practices which are carried out in that school on a daily, weekly and yearly basis" – admission policies, class allocations, streaming, discipline, pastoral care, assessment, competition, extra-curricular activities, symbols, celebrations, relationships – "in short, in what is valued by the school" (McGuinness, 2000, p245).

There is no doubt that school ethos is difficult to put one's finger on, but some kind of measurement has been attempted, with Munn et al (2001) identifying four elements of school ethos: core beliefs about education, teaching and learning, and learners; the resulting curriculum; the school's relationship with parents; and how schools deal with discipline. Measuring a school ethos should consider such aspects as the relationship between teachers and pupils, an emphasis on academic pursuits, teacher expectations and attitudes towards pupils, positive reinforcement and consistent standards (Glover and Coleman, 2005): "a collective understanding of how things are done" (Hatton, 2013, p159).

It is perhaps easier, however, to observe a school ethos from the outside than internally: "Although rarely to the fore of the consciousness of teachers and pupils, the ethos of a school is often readily perceptible to visitors" (Williams, 2000, p75). Smith (1995) talks of the, "vibrations given off by a school" (p44), while Stevens and Sanchez (1999) found that ethos is a feeling perceived by outsiders which is not easy to articulate or describe.

Glover and Coleman (2005) have attempted this articulation and description, suggesting that, in schools, *climate* refers to their measurable inputs and outcomes, *culture* relates to how the school environment, organisation and experience integrate, and *ethos* deals with the subjective elements of values and principles on which policy and practice are built. The following sections will consider this further.

What ethos should be

Aristotle's view of how ethos manifests itself is through habituation: good character leads a person to act in a good way as a matter of habit; good habits and good character come about through doing good things. This cyclical process is well described in Nichomachean Ethics II, 1 (in Halloran, 1982, p61): "men become builders by building houses, and harpists by playing the harp. Similarly we become just by the practice of just actions, self-controlled by exercising self-control, and courageous by performing acts of courage." In the same way, argues Halloran, the actions that express a group's ethos are the same actions that form it; they both manifest and shape the ethos.

Hogan (1984) describes three distinct types of ethos: custodial; accommodating; and natural/habitual. The first sees the authorities of schools, "as custodians of a set of standards, which are to be preserved, defended and transmitted through the agency of schools" (p695). The second, "views ethos as the accommodation of various interests" (p699) which often leads to a dilution of core purpose and an ethos, "quite at odds with its own historical origins" (p696). The final conception, "sees ethos primarily as the natural outcome of what actually goes on… regardless of what kind of standard the school is formally thought to represent" (p697).

Donnelly (2000) also proposes three conceptions: an *aspirational ethos* is that which is, "set out by school authorities and made apparent in school documents" (p150); an *ethos of inward attachment*, "is comprised of the genuine priorities, attitudes and visions which individuals hold in their personal lives and in relation to the aspirational ethos of the school" (p152); and an *ethos of outward attachment* is one which pays lip-service to the aspirational ethos. Donnelly argues that each offers a different lens for how one views school ethos, "and through each lens it is possible to construct an image of the variations within and across schools" (p152).

Whilst these ethoi may vary across institutions, McLaughlin (2005) argues that every ethos should have the following characteristics in common: an ethos should be *value-laden* and, "revealed in certain specific qualities of character, such as good sense, good moral character and good will" (p312). It should be *clear and defensible* along educational lines; schools should have clarity and should be confident enough, "to put themselves under the microscope from time to time by eliciting pupil and parent views" (Glover and Coleman, 20005, p259). An ethos should also be *coherent*, says McLaughlin (2005): "forms of inconsistency, conflict, fragmentation and disharmony within an ethos… can undermine it" (p313). It should also be *impactful*, being, "potent and pervasive in the sense that it must exert a discernible influence" (p314). An ethos should become a *norm* and should have, "a given, established feel to it in that it aspires to become 'taken for granted'" (p314). Finally, an ethos should exert its influence at an unconscious level: "an ethos tends to 'speak for itself' and does not require constant and extensive articulation" (p315).

However, in the real world, Eisner (1994) states that there can be a gap between what the school articulates as its ethos and what that ethos actually is. This is gap is echoed in policy; policies invariably are subject to the vagaries of how they are communicated and received. "Policies project images of an ideal society", attempting to define what counts as education (Ball, 1990, p3); they are the out-workings of, "the policy-makers' dreamworld" (Ball, 1997, p265; 2005, p17), which is, "colour and gender and ability blind" (Ball, 2013, p103) and which rarely factors in such things as the state of buildings, money, time and resources. Often, what ends up in front of those with the responsibility for implementing policy, "may not even reflect policy makers' intentions to begin with" (Jones, 2013, p4), becoming little more than symbolic gestures (Berkhout and Wielemans, 1999), which fail to effect change or solve problems, because, "education policy is not just about what people say and do, education policy is also about buildings and about money, and power relations…" (Avelar, 2016, p11). Ball suggests that policy analysis too often ignores context and researchers "dematerialise" (ibid) their work, which, "dislocates schools and classrooms from their physical and cultural environment. They all begin to 'look' and 'sound' the same" (Ball, 2005, p19).

The research of Chadwick (1994), Donnelly (2000) and Green (2009) found that ethos is not something which can planned ahead and merely handed down, and Hatton's (2013) research found clear evidence of views expressed by staff not corresponding to the practices within the school. Solvason (2005) also identified this gap in his study of relationships between teachers and students and Hyland (2000, p27) talks of, "a dichotomy between theory and practice." As with so many others, Graham (2012, p342) cites Donnelly's (2000) work, in which her evidence demonstrates a 'gap' between the articulated ethos and lived experiences of school staff.

> Although impalpable, ethos is nonetheless something real... the ethos of the school we attended remains part of our consciousness. When most of what we have learned at school has dropped into the deep well of human forgetfulness, a sense of ethos of the school can often remain as part of us... the ethos of a school touches the very quality of our lives and can constitute an abiding element in the fabric of our very identity.
>
> (Williams, 2000, p76)

So, as to the 'what', the literature suggests that policy is somewhat easier to define than ethos, which is commonly used with, instead of or alongside other terms. It has also uncovered a 'gap' in both between what is intended and what actually occurs. The next section will address the 'why' of ethos, considering its purpose and impact.

The why

Purpose

Policies are about change. Trowler et al (2003) suggest that this change begins with an identification of the reasons behind an intended innovation, followed by, "a challenge to the beliefs that are incompatible" with it (p13), followed by a strategy of changing these beliefs, "by setting out the case for preferring the innovation to existing practices" (p13), followed by the adoption and then implementation of the policy. If ethos is about values and beliefs, then it must follow that it is the ethos which is either compatible or incompatible with the intended policy.

Ball et al (2011) suggest that the purpose of policy is to provide, "a vocabulary for thinking about and talking about practice, reflecting upon it and evaluating it" (p622). Ball (2013) opines that its role is to build on, advance and extend previous policies, whilst Berkhout and Wielemans (1999) propose that policies form part of the struggle to exert control over the future and to impose values. The question here surely is around what values are being imposed and how these values complement or contradict those inherent in a school's ethos.

> To educate, therefore, is not simply to get people to learn. It is to get people to learn what is believed to be worthwhile... to acquire ways of understanding and seeing the world which enhance the quality of life.
>
> (Pring, 2000, p5)

Barr (2000) suggests that, unless schools clarify what kind of ethos they wish to promote and develop, they may find themselves assuming that school members share a common understanding while actually having a range of understandings and intentions. If schools are to offer, "education with a character" (DfEE, 2001, 4.77), a positive school ethos is a key factor and, indeed, "the starting point for learning" (Graham, 2012, p342). This 'character' is one of the key outcomes of ethos in education, according to McLaughlin (2005, p318), along with, "virtue, dispositions, sensitivities of perception and qualities of judgement… practical wisdom… practical knowledge of the good… intelligent and personally engaged sensitivity to situations and individuals, including oneself, in making judgements about what constitutes an appropriate expression of the good in a given circumstance."

For Aristotle, education is about human development, which is about enculturation into a context in which the qualities of character are practised and recognised. Schools should be places in which moral judgement and principles are expressed, rather than self-interest or social pressure; places where the practices of living are considered, within the context of an educationally challenging curriculum (Pring, 2000). Schools should facilitate, constitute and embody positive influences (McLaughlin, 2005) and should be places in which, "moral and professional deliberation" is more important than meeting targets (Pring, 2000, p12). Schools should be places which promote in all pupils:

> …independence of mind, consideration for others, a sense of fairness, together with respect for justice and the rights of others… the challenge for schools is how to implement such recommendations while still preserving their individual identities, culture and ethos.
>
> (Mulcahy, 2000, p85)

The additional challenge is how schools can do this within an educational policy landscape that currently appears to prize results, statistics and targets above the holistic development of the learner. The policies related to school improvement and school effectiveness, however, can be linked to school ethos, which has been argued to be, "integral" to 'successful' schools (Graham, 2012, p341). This successful ethos can be attributed to, "a school's organisation and the way children are taught" (Smith, 1995, p24), consistency in, "leadership, administrative structures and rules" (Hatton, 2013, p159), "a sense of shared responsibility within the school community [which] can foster an inclusive school ethos" (ibid, p169) and the connections with all stakeholders (Smith, 2003), "between education and the church, the youth service, the police, and all who are driven by the common aim of producing a more humane society" (Pring, 2000, p13). These components create a successful ethos, an ethos which can produce well-rounded pupils and an ethos which impacts upon their lives.

Impact

Coolahan (2000) suggests that the quality of school life is bound up with its ethos, and Smith (1995) believes that schools with a positive ethos need to avoid being defensive about what they are trying to do and embrace the excitement of moving forward, rather than becoming complacent. It is not wrong to promote the ideas of success and failure, suggests Murray (2000), but schools should not, "equate educational success with academic success" (p16). Whilst positive school ethos has been linked with academic achievement, attendance and good behaviour (Charles and McHugh, 2000), Askew (1989) argues that, rather than simply looking at behaviour itself, the organisation and structure of the school is an important ethos indicator (Indeed, care needs to be taken that the ethos of a school does not perpetuate rather than mitigate aggressive behaviour (Davidson, 1985; Stephenson and Smith, 1987).).

In the same way that Ball (2013) suggests that policies build on, advance and extend previous policies, Charles and McHugh argue that ethos is not static, but, "changes over time and reflects the larger societal system within which it is embedded (2000, p182). What is of crucial importance is the, "follow-through" into day-to-day life of the practices and relationships of the ethos that is espoused in the school (Smith, 1995, p34), until such times as it becomes habitual, taken-for-granted, "totally unremarkable, natural and integral" (Murray, 2000, p16).

This unremarkable modus vivendi only becomes possible and only has a positive impact with careful planning and implementation, and it certainly, "isn't a quick fix" (Barr, 2000, p137). It requires collaboration, a shared vision, connections between vision and practice, feedback (ibid), clarity, consensus, support, commitment, 'stickability' (Murray, 2000), good teacher/pupil, staff and parent/teacher relationships, positive behaviour management, communication, an inviting environment, consultation, training, mentoring, perception of the need to change and a readiness to change (Charles and McHugh, 2000), effective leadership, continuity and consistency, effective and intellectually-challenging teaching, a climate of praise, a learning-orientated environment in and out of the classroom (Mortimore et al, 1988), the celebration of success, fair allocation of resources, effective staff development, a noticeable ethos to outsiders, an understanding of the school's place in the bigger picture (Smith, 1995). Essentially, Smith (2003, p477) believes that ensuring that the school ethos is impactful means that it, "includes the qualities of the learning environment, the values, beliefs and principles that are conveyed to the pupils through the actions and behaviours (deliberate and otherwise) of the educators in the school, and the habituses brought to the school by pupils and staff and those that emanate from institutions in the external environment."

As these, "...values do not float free of their social context. We need to ask whose values are validated in policy, and whose are not" (Ball, 1990, p3). Likewise, in the study of ethos, what is therefore of central importance is understanding not just the 'what' and 'why' of policy, but the 'who': "When all is said and done, it is people who formulate and sustain the culture and ethos" (Coolahan, 2000, p121).

The who

Whilst every school should be the centre of the community, unfortunately many schools tend to see themselves as the centre of the universe. However, ethos cannot be constructed in isolation (Murray, 2000) and a school's character is, "to a very large extent, governed by factors external to it" (p17), such as geography, the state of the buildings, resources, social class (ibid), the wider educational system and its policy priorities, framework and influence (Coolahan, 2000; McCormack, 2000; McGuinness, 2000), and, of course, the philosophy, values and beliefs of school partners (ibid). So who then are the key actors, "who are the key spokespersons i.e. where does the power lie in the construction of ethos?" (Green, 2014, p293). In considering the 'who' of ethos, the literature on policy is particularly helpful as it allows for consideration of how actors interact in the process and, "examining what individuals and groups actually do in response to policy" (Nudzor, 2009, p91).

Grek (2011, p239) suggests that, in order to identify the people and voices who inhabit policy and with whom the policy researcher engages, researchers need to see policy as a narrative or story, "as a construction of events and relationships that has a particular plot and follows certain conventions in the roles taken by actors". These actors, "are both receivers and agents of policy" (Saunders, 1987, p108) and may include the state, officials of the state, vested interests and stakeholders, school leaders, education professionals, parents and children.

Ball et al (2011b) suggest that there are seven types of policy actor:
- *narrators*: explain, story-tell (Boje, 1991) and create narratives, "as a focus of organisational commitment and cohesion, and for the consumption by various publics" (Ball et al, 2011b, p627);
- *entrepreneurs*: charismatic, persuasive and forceful advocates and recruiters for change, re-working and refining policy to translate it to their own context;
- *outsiders*: consultants and advisers to translate and offer interpretations of interpretations (Rizvi and Kemmis, 1987);
- *transactors*: make policy calculable and teachers accountable;
- *enthusiasts*: see opportunities to make policies work for their subjects and for their own development and therefore embody it in their practice;
- *translators*: make policies work within the collective practice of their particular environment;
- *critics*: contribute to policy work with an eye to the protection of interests and to the utilisation of Foucault's (1972) field of memory to provide counter discourses;
- *receivers*: compliant and reliant on senior colleagues for guidance, direction and instruction.

So, how does the researcher know, "which voices count the most, or where and how key decisions are arrived at" (Ball, 2013, p223) and how, "various institutions, interest groups, and actors endeavour to influence" (Berkhout & Wielemans, 1999, p418)?

Stakeholders

Firstly, those whose voices count most must be influential (Ball, 1990) and powerful (Grek, 2011). They are typically, "bureaucrats, policy advisors, politicians and 'spin doctors'" (Lingard et al, 2005, p768), "government official data 'crunchers'" (Grek, 2011, p237) and others who are, "formally recognised and built into the consultative procedures" (ibid), with other stakeholders such as principals, teachers, parents and learners, and the general public on the side-lines (Lingard et al, 2005; Issakyan et al, 2008). At its most basic level, the process of making policy is enacted through the traditional relationship between the state and the citizen (Berkhout and Wielemans, 1999) with the latter represented by bodies such as parents' groups and trade unions (Grek, 2011).

This traditional relationship denotes the importance of history in, "influencing the transformation of policy into practice" (Berkhout and Wielemans, 1999, p412). Geography is also important, especially in a small community such as N. Ireland in which, as in Scotland, there are, "well-developed sets of relations that have developed over many years and that remain close in a small country with very strongly-networked associations" (Isaakyan et al, 2008, p24).

Often policy-making has as much to do with discrediting the past (Ball, 1990), appearing newer and better than that which was before, imagining a better and brighter future (Lingard and Sellar, 2013). It is fundamentally about the exercise of power (Olssen et al, 2014) and the language used to legitimate the policy process (Nudzor, 2009), a language which has introduced a new, "mediatisation of policy" (Lingard and Rawolle, 2004, p361) wherein the media is now one of the major actors in influencing policy (Ball, 2013). This use of language will be returned to, but, within the context of power relations, Arvidsson (2012) suggests that it is one of three important measures for how policy becomes reality: how often a policy imperative is spoken or written about; the influence of the actors who articulate it; and the passion and intensity with which they do so.

This passion and influence has certainly been attributed to the role of the churches as key policy actors, with Ball (2013) tracing the roots of the current education system in the UK from, "church schools and voluntary organisations" (p66). Whilst Barber (1994, p23) suggests that the move from church to state control, "proved more complex, more sensitive and more fiercely contested than any other wartime education reform", Ball (2013, p113) considers that, "philanthropy, voluntarism and faith schools are all very much back on the educational policy agenda."

Teachers

Teachers have a, "pivotal" (Mulcahy, 2000, p87) or, "key role in inculcating the ethos" argues Donnelly (2004, p266) and have a, "crucial input into maintaining" it (Coolahan, 2000, p121). They are, "centre stage" (Donnelly, 2004, p266) in ensuring that the ethos is shaped from their thinking and acting (Bakker and ter Avest (2005). McLaughlin (2005, p319) refers to the work of Oakeshott (1990) as pointing to, "the complex and living inheritance which teachers pass on to their pupils… in ways which are highly related to an ethos: tones of voice, gestures, asides, oblique utterances and by example."

Whilst teachers' own personal, "expectations, sensitivities, priorities and values" (Vlachou, 1997, p173) exert, "a defining influence on the school ethos" (Donnelly, 2004, Abstract), Rowe (2000, p174) suggests that, "It goes without saying that the selection of a teaching staff… committed to the implementation of the ethos in the whole life of the school is of paramount importance." There is an expectation from school authorities that staff therefore set an example in line with the ethos

(McLaughlin, 2005); indeed, staff who share the ethos of a school are more likely to espouse it (Green, 2014) and "actively *enact*" it (Donnelly, 2004, p265).

Does this pose a problem for teachers? In their research into schools with a Christian ethos, Bakker and ter Avest (2005) found that until teachers were asked to reflect on this, they had no problem as the ethos proved to be, "an abstract concept that exists rather isolated from the daily practices of the school" (p357). Boldt (2000, p42) picks up on this notion of reflection, suggesting that teachers welcome it:

> In general, teachers reported a positive attitude to being afforded an opportunity to reflect on and articulate the ethos of their schools. The attitudes of teachers suggested that they are interested in the ethos of their schools and willing to spend time understanding and reflecting upon their values.

Time for reflection can be pitifully scarce in the current educational landscape, however, and can result in an understanding of their school's ethos which is, "frustratingly vague" (Green, 2014, p296). In NI, in particular, with an agenda of Shared Education between (mainly) Maintained and Controlled schools, "policy makers may need to reconsider the support which Catholic and Protestant teachers are offered in this regard" (Donnelly, 2012, p549). The need for this time was clear in the work of Boldt (2000) who found that, "time to reflect on and articulate the ethos of their school would 'give direction and purpose'... [and] reflecting on and articulating the ethos of their school would 'help develop well rounded individuals'" (p40).

Pupils

These 'well rounded individuals' are, of course, the pupils. Whilst they are not directly key actors in the creation and outworking of a school's ethos, their behaviour and attitudes invariably demonstrate the manifestation of it. However, it is they who are the *recipients* of the ethos, they have a perspective on it (Graham, 2012) and they perceive it (Green, 2014).

Pike (2008, p6) believes that pupils respond to what their school's ethos, "believes about them, what it believes they are capable of achieving and what it believes about their place in the world. Pupils interpret ethos: it is a 'text' that young people can read." How pupils, and indeed, parents 'read' their school, "is perhaps the real test in any liberal democracy" (Pike, 2011, p569).

Parents

Parents too have an important role in school ethos. Throughout the literature, the extent to which parents are involved with schools is mentioned often (see, for example, Glover and Coleman, 2005; Charles and McHugh, 2000); Donnelly (2000) even goes so far as to conceptualise an, "ethos of parental involvement" (p147). Lambkin (2000) talks of the behaviour of parents as being a factor in the manifestation of ethos. Munn et al (2000), Canavan and Monahan (2000) and Donnelly (2004) cite relationships with parents as a key indicator of ethos. Smith (1995) suggests that ethos is constructed partly through interaction with parents, whilst Smith (2000) talks of the culture mix that they bring to the school ethos. Rowe (2000) cites the expectations which parents have over ethos and also the importance of communication with them, as do Glover and Coleman (2005) and Coolahan (2000).

Perhaps the most obvious area in which parents become involved in ethos is in their exercising choice over which schools to send their children (McCormack, 2000; Pike, 2008; Green and Cooling, 2009). This is seen most obviously when school ethos is based upon religion; sometimes this is manifested in a positive way and, "admired and respected by these religiously inactive individuals" (Hemming, 2011, p1072). Sometimes it is as a reaction against an overtly religious ethos: "integrated education for many parents often represents a choice *against* the conventional school types as opposed to a choice *for* integrated schools" (Donnelly, 2000, p146).

Although parents discuss ethos (Bakker and ter Avest, 2005), Boldt's (2000) study sees them suggesting that ethos is decided by school authorities, implying their view that they have no part in ethos. Donnelly (2000) disputes this, suggesting that, "the impetus for integrated education came largely from groups of parents" (p145) and Pike's (2008) work talks of parents founding Christian schools. Williams (2000, p82) believes that ethos should be, "owned and shared" by and with all parents and should emerge, "from the genuinely held convictions and aspirations of parents and teachers and pupils."

School leaders

However, ethos cannot arise out of random events, argues Smith (1995); it takes the commitment of time and leadership. Leaders in schools are, "participants and co-learners in the ethos, simultaneously creatures of it and partly creators of it" (Smith, 2003, p469) and the style of leadership will have a, "profound effect" (Smith, 1995, p30) on the ethos of the school. Green (2014, p296) proposes that school leaders, "shoulder almost sole responsibility for the success or otherwise of their schools" and that the area of ethos is a small, if any part of their training. This can lead to a lack of confidence in articulating it and a vision sometimes at variance with governors which becomes fragmented, "misunderstood and misinterpreted" (Smith, 1995, p36).

This, therefore, calls for an atmosphere of trust within school leadership (Rowe, 2000) so that, in addition to the effective outworking of the school's ethos, they, "develop an ethos of working together to achieve the aims of the school" (Smith, 1995, p44). After all, leaders are, "individual actors" (Francis, 2015, p448) and the role of specific, powerful individuals cannot be underestimated, a point raised by Scribner et al (1994) who talk of the way in which individuals can influence and shift debates as they move in and out of positions of influence.

The literature on policy further aids understanding of the 'who' of ethos in that the act of making policy is a complex one, with no guarantees over who controls it (Richardson, 2007); and policies are the intended practical out-workings or, "the authoritative allocation of values" of policy actors (Kogan, 1975, p55) who try to, "impose values on the future" (Berkhout and Wielemans, 1999, p404) beginning by, "determining how employees should think and feel… [and]… imprinting the core values of the organisation" upon them (Wilmott, 1993, pp522&523). Trying to come to a, "negotiated single solution" therefore invariably compromises the values of actors (Swanson, 1989, p273) and it these competitions between values (Cibulka, 1994) that form much of the bases for conflict.

Without ethos, this conflict can manifest itself in differences, "between the objectives of the school and the culture of the pupils from the local area" (Glover and Coleman, 2005, p258), and, as is the case in NI, the, "complex web of social forces in which teachers charged with delivering values are enmeshed" (Donnelly, 2004, p266).

In order to mitigate this conflict, trust must therefore be established and this trust begins with discussion, dialogue, negotiation and agreement – with words

The words

Written – ethos as text

An ethos which is, "deliberately shaped or stipulated" can be viewed as intentional, articulated, intended or cognitive (McLaughlin, 2005, p312), and Boldt (2000, p42) suggests that an intentional ethos is what the authorities, "determine to be the aims, values and conduct of the school." Rowe (2000) suggests that, "it is a fundamental obligation of any school to define its ethos in written form" (p171) as it, "allows all concerned to know exactly where they stand" (p172).

These clear presentations can be viewed as policy texts, which Lewis and Simon (1986, p458) describe as, "written passages, oral communication, nonverbal communication accomplished through body movement and expression, and visual forms of representation such as paintings, photographs, and sculpture". Ball calls them physical codes captured in policy documents (Gale, 1999), or an over-arching, "governing text" (Callewaert, 2006, p76), whilst Jones (2013) argues that they can either be physical documents, or, "an official spoken requirement (verbal text) on expected behaviours" (p3). Gale (1999) suggests that such texts can be defined as: discernible through the senses; having some sort of attributable meaning; either stand-alone, or reliant on other texts for it to make sense.

Yet texts are, "rarely the work of single authors or a single process of production" (Ball, 1993, p11) and are the incomplete products of compromise; as authors can't control the interpretation of their texts, the meaning can shift and change as key interpreters and actors change (sometimes deliberately in order to change the meaning of policy); texts often take on a life of their own, are read in different ways by different actors, and their intentions are, "re-worked and re-oriented over time" (ibid).

Indeed, "some texts are never even read first hand" (ibid). They can be unworkable, with neither funding, nor resources, nor guidance, and can also be ignored, "buried in the depths of thick manuals or hidden at the end of infinitely diverting clicks on hyperlinked webpages" (Jones, 2013, p3). Alternatively they can be trumpeted as models of good practice when politically expedient, or equally decried by their opponents, who use their words to press home counter-agendas. More often than not, the intentions of those who have initiated, produced and disseminated the text may not be reflected in how they have been de-contextualised (ibid).

> Thus, the physical text that pops through the school letterbox, or where ever, does not arrive 'out of the blue'… The text and its readers and the context of response all have histories.
>
> (Ball, 1993, p11)

Spoken – ethos as discourse

If the language of the 'intended' ethos is, "part and parcel of… official documents", that of the 'lived' ethos is written in another language altogether (Bakker and ter Avest, 2005, p360). Jones (2013)

suggests that, in addition to the conceptualisation of policy as text, "there is also theoretical work that understands policy as *mobilising specific 'discourses' within or across its various texts and processes*" (p10, original emphasis).

Rogers et al (2005) define discourse as a running to and fro described in the Latin *discursus*, while Gilbert believes that it is the engagement between people, "making and interpreting meaning" (1992, p58). Ball's view is that discourses are not just about the statements, or indeed, the process of coming up with the statements, but that, "Discourses are about what can be said, and thought, but also about who can speak, when, where and with what authority" (Ball, 1993, p14).

Similarly, ethos, "cannot be imposed by legislative *fiat*" (Williams, 2000, p82) and, unless it is to be an, "ethos of coercion" (ibid), it must be, "a *negotiated* process whereby individuals come to some agreement" (Donnelly, 2000, p150); however, "the dilemma of ethos" (ibid) is in how difficult this often proves to be. Ethos can only best be created and manifested through shared, continuing, ongoing discourse, integrated into the life of the school (Coolahan, 2000; Rowe, 2000): "from the academic article to the policy document and curriculum specifications, from the folk wisdom of the staffroom to the principal's speech at the school assembly, and from the classroom text to student small group and lesson talk" (Luke and Luke, 1995, p364).

This dialogue should begin at school level (Bakker and ter Avest, 2005) and it should be real rather than simply an exchange of views which make people aware of the variety of opinions, argues Donnelly (2004). It should be within the process of frank discussions which, "not only help individuals to explore their own 'taken for granted' assumptions but should also encourage them to come to an acceptance of what others believe" (p265).

Whether such a democratic process of owning a shared ethos is actually possible within schools has been questioned (Williams, 2000), but, in order for agreement to be reached, it must be, "an idea and discussion driven process" (Rowe, 2000, p174). This tentative process (Graham, 2012) begins with every-day relationship building (Hogan, 1984), which has discourse or dialogue at its core and involves all of the school's partners (McCormack, 2000). Ultimately such an approach to ethos in turn influences the ethos and influences others' attitudes to the ethos: "dialogue builds a distinct ethos of its own" (Hogan, 1984, p702).

Fairclough (1989, 1992, 1995) suggests that any, "discursive event" (1992, p4) has three key elements: the reading of the text; the discursive processes of development and interpretation; and the practices which happen within the social and/or historical contexts that shape the discourses. Discourses can compete, yet converge (Foucault, 1972) and they can also constrain (Trowler, 1998) and limit (Henry, 1993; Gale, 1999) in how their interpretation, "constrains the 'intended' meanings" of texts (Nudzor, 1999, p91). Policy as discourse, argues Ball, can be brought together in, "policy ensembles" (1993, p14), a, "discursive ensemble" (2013, p166) which brings together related policies into an acceptable articulation, "so it doesn't matter what some people say or think, only certain voices can be heard as meaningful or authoritative" (1993, p15).

Those policy narratives, or, "policy rhetorics" (Ball, 2013, p6) can disparage alternative actors, decrying their positions as dogmatic, self-interested ideologies (Francis, 2015), or can be used to bring individuals on board through rhetorics of persuasion (Nicholl and Edwards, 2004). Individuals themselves, whilst not enjoying equal access to influence, can participate in, validate or reject policy rhetorics (ibid), actively promoting a narrative, especially now through social media (Freedman, 2014).

Often these narratives create, rather than reflect, reality, "deployed in the attempt to produce certain meanings and effects" (Edwards et al, 1999, p620), "making particular sets of ideas obvious, common-sense and 'true'" (Ball, 2013, p7)

Whilst Foucault (1974, p49) suggests that discourse is, "irreducible to language and speech", nonetheless the words and language employed around a policy are of vital importance: "…the ways in which policies are spoken and spoken about, their vocabularies, are part of the creation of their conditions of acceptance and enactment" (Ball, 2013, p7). The language of policy works, "to privilege certain ideas and topics and speakers and exclude others" (ibid), using, "the frequent deployment of particular phrases and tropes that signify a broader policy narrative" (Francis, 2015, p442).

The use of language in ethos is also all-important (Hagan, 2016). If you change the language, you transform the ethos, your understanding of it and your moral lens (Pring, 2000); you change, "the values which are picked out, the qualities which are respected, the aims which are thought worth pursuing" (p13).

Yet, Deakin Crick (2002) suggests that pupils and teachers lack a common language through which to articulate school ethos, and Green and Cooling, 2009, p40) argue that, "this lack of vocabulary… is a significant barrier to the development of distinctive whole-school approaches to ethos."

Unspoken – the symbols of ethos

Williams (2000) argues that sometimes ethos, "is suggested in the prominence of symbols" (p76), whether that be religious, sporting, artistic, patriotic, academic, or civic. He suggests that, "One very striking symbol of ethos is the school uniform, which says much more about the real ethos than claims in mission statements about respecting individuality."

Usually (and especially in a N. Ireland context) the symbols denote faith. Donnelly (2000, p142) suggests that these make the religious ethos, "immediately obvious", a point picked up by Hagan (2016) about his own institution, through which he sounds a note of caution: "there is a fine balance between overtly displaying foundational signs and symbols, and having them perceived as exclusionary" (p114) to those of a different worldview.

Believed – ethos and faith

Whilst the ethos of a school, "need not, in principle, imply anything religious" (Williams, 2000, p76), McLaughlin (2003; 2005) argues that, "the school has a responsibility… to engage with matters of moral texture and complexity" (2005, p321). Williams (2000, p77) states that schools with a religious ethos foster in pupils a commitment to the religious message, pointing them to, "the ultimate values and purposes of human life." Given, however, that an ethos often exerts its influence in an unconscious way (McLaughlin (2005), care must be taken to avoid indoctrination, through the understanding that a faith-view and cultural context exist, "in a symbiotic relationship" (Clarke, 2000, p165).

If, "education provides answers to what are considered to be primarily religious questions" (Cox, 2003, p267), then, no school can be ideology-free (Clarke, 2000) and, "all schools are faith schools" (Pike, 2004, p153). These schools, according to Pike, provide, "a rich preparation for life and work in our

society", an alternative moral lens through which to see a direction for their talents and opportunities in a culture which prizes entertainment, materialism, consumerism, having a good time and putting oneself before others (2008, p81).

How schools promote such an ethos is of great importance. Pike (2008) suggests that schools with a faith ethos can do this by either being 'nurture' schools, in which the faith practised in home and church is, "congruent with that provided at school" (p9), or by being 'service' schools in which faith is seen as a driver for the school, "to serve local communities… and to improve the opportunities for young people in these communities" (p9). He also believes that schools with a faith-based ethos educate for good character and academic success, fostering belief in pupils' potential, but ensuring that their values are not based upon what they do, but who they are. Such schools, he argues, promote a criticality in seeing the 'bigger picture' around, "worldviews and truth claims" (p76) and a Biblical and cultural literacy that, "provide students with the cultural tools needed for participation and full citizenship in their society" (p77).

Yet, the role of faith in schools and the extent to which ethos should be faith-based is highly contentious. Bruce and Voas (2010, p243) chart the decline in, "power, popularity and prestige" of the Christian churches, with declining church attendance and affiliation (Voas and Crockett, 2005; Clarke and Woodhead, 2015). Writers such as Brown (2010) and Hemming (2011, p1062) have questioned whether the UK can still claim a Christian identity or whether we are seeing the, "death of Christian Britain." Clarke and Woodhead (2015) believe that the monopoly of the Christian churches over religion has been lost over the last twenty-five years, giving way to, "a much wider and more diverse range of religious and non-religious commitments" (p6) with more people describing themselves as non-religious or spiritual, rather than religious (Woodhead and Catto, 2013).

However, according to Clarke and Woodhead (2015, p6), religion is still, "an inescapably important aspect of our modern world", and, "any simplistic notion of universally advancing secularisation… has long been called into question by sociologists and political philosophers" (Kitching, 2013, p22). Whilst, he argues, it is necessary to critique the imposition of certain values on children and young people, as with Clarke (2000), Hagan (2016) believes that it is the role of schools with a faith-based ethos to defend their value and rationale, but to balance this with the context of a globalised, multi-cultural and multi-faith world.

Contested – ethos and society

Although David Blunkett famously stated, "If I could put the ethos of church schools into bottles, I would send one to every school in the country" (Lambkin, 2000, p191), "it is necessary to acknowledge that a Christian ethos school will not be found acceptable to everyone" (Williams, 2000, p77). Irish President, Mary McAleese, at the opening of the 2000 *School Ethos and Culture Conference*, suggested that, "…no school worthy of the name exists exclusively as a recruiting agency for a particular viewpoint." Using schools as, "an evangelising agent" had always been in the case in NI, pre-Partition and for most of the twentieth century (Hyland, 2000, p23) and schools with a faith-based ethos have been both defended and attacked with relation to standards, spiritual and character development and beliefs. Today, however, many people have, "trouble grasping the concept of 'Christian education' because in our liberal environment education is education" (Hull, 2003, p211); indeed, for many, "there is a completely secular mind-set that, when looking in from the outside only sees something medieval or patriarchal or hierarchical or political or mystical" (Hagan, 2016, p113).

In a society which now has less religious orientation, there is a belief that religion is private and education is public (Commission for Racial Equality, 1990; Baumfield, 2003; Locke, 2003). There is a view that, "official religious institutions maintain value for citizens through the provision of public utilities and the expression of a collective cultural memory" (Hemming, 2011, p1063), but that this should not permeate the education system. Schools with a faith-based ethos have been castigated for being myopic and divisive (Hughes, 2011), prejudicial and sectarian (CCMS, 2007), elitist and limiting (Berkley, 2008). At the same time, supporters argue that they can provide, "a moral and religious framework that engenders confidence in their own identity and helps them to be respectful of the beliefs and values of others" (Hughes, 2011, p830).

For schools to be secular this pre-supposes a neutral, inclusive worldview in which a school's values should reflect society's values. Yet, "parents generally want their children to have different values to the celebrities who gain notoriety on 'reality' TV shows or make headlines for the wrong reasons. For schools to reflect such aspects of society would be a serious mistake. Education and schooling are not the media or entertainment industry" (Pike, 2008, p81). Secular schools are not a neutral alternative to religious ones and neutrality is a very elusive goal in education, Halstead (1995) argues, invariably leading to the scales being tipped in favour of some community's values over another; Pike (2008) believes that, rather than, neutrality, such schools tend to favour secular, liberal or humanist views; and Jackson (2003) talks of an education that denounces religion inculcating in pupils the same narrowness of views as that which espouses a fundamentalist position.

In the same way that those of no faith find it hard to grapple with it in education, those for whom it is an all-embracing lifestyle find it, "incomprehensible" to separate faith and learning (Pike, 2004, p151). If a way through is to be found, this needs to start with openness: "schools need to come clean about the beliefs and values underpinning" their ethos (Pike, 2008, p7) and, in openly declaring worldviews, pupils are more likely to be able to make up their own minds what to believe:

> Schools seek to change children. The issue is not so much *whether* schools teach children what to believe but *how* they do so and *what* children learn… Schooling always provides answers to 'religious' questions because it tackles issues of origin, purpose, truth, value and destiny… Schools and teachers always believe in *something*, they are not worldview-neutral for schooling is an inherently value-laden activity.
>
> (Pike, 2008, p8)

Conclusion

Before leaving this review of literature on ethos and on policy, and moving on to outlining the 'how' of the process of designing the study, it is useful to take stock of what has been learned and to consider the relationship between the two. From the literature, including that which theoretically underpins the next chapter, it can be argued that both policy and ethos have the following features in common:

The meaning of both is taken for granted, with a failure to define either conceptually, but, essentially, both are about practice, beliefs, values, and the power struggle involving key actors to impose these values and exert control over the future. Contested and changing, they both have dynamic, ongoing, cyclical processes which are negotiated and subject to compromise. Ideally, both should be discussed and agreed within school context between all members, as both can come from 'top down' and 'bottom up'. Whilst they are both dependent on effective leadership, their interpretation, translation

and enactment involve discursive processes, as both impact, not only organisations, but individuals, determining their actions within school communities.

Both ethos and policy can be said to have two distinct types: official, dictating, imposed, utopian, ideal, or intended, at the same time as they can be developmental, common sense, emerging, and lived, and both are created in the gap or process between these two positions. Both can also be as much symbolic as real, depending on words, symbols, artefacts, actions, discourse, thoughts and sets of conventions for their implementation and enactment.

In understanding how and why schools react in different ways to policy initiatives, we can understand their ethos more fully. By understanding the context that is so important for both, it is possible to see how these historical, traditional or geographical circumstances can impact upon the policy direction of an organisation. It would appear, however, that context is secondary to people, and it is those who inhabit an organisation and those who have some kind of a stake in it who make the biggest impact upon policy and ethos. Both policy and ethos are therefore dependent upon relationships, trust and symbiosis.

The literature demonstrates that there are many links between policy and ethos and that, by viewing ethos through the lens of policy, it is possible to understand it more fully. However, it would appear that the central link between the two is that ethos creates the conditions in which policy happens and the environment in which policy can flourish, which leads to a conclusion of what can be learned from the 'what', 'why', 'who', 'how' and 'words'. Policies are about change and challenge; they are about *what* has to be done. Without a common ethos (communicated through written, spoken, unspoken, negotiated and believed *words*), school communities have no shared understanding of *who* they are or *what* they stand for, and without that they have no common understanding of *why* and *how* they should embrace or enact policy.

Methodology

This chapter will consider the 'how' of ethos. Again using policy as a lens, it will consider how it has been investigated previously and how this resonates with my ontological, epistemological and methodological view of the world. It will then propose a theoretical framework for how it could be explored through this study, and will conclude with the detail of how the research was carried out.

How it is viewed paradigmatically

All research is informed by assumptions about the world, and those who conduct it do so within the context of their own worldviews or *paradigms* which influence how it is undertaken. These theoretical frameworks or 'knowledge claims' (Cresswell, 2003) are sets of beliefs or assumptions which guide enquiries (Guba and Lincoln, 2005; Cresswell and Plano Clark, 2010). In thinking about ethos and designing a research investigation into its definition, purpose and importance, the starting point must be the researcher's worldview and, "what paradigm informs his or her approach" (Guba and Lincoln, 1994 p. 116).

The first element which therefore needed to be considered was my own position in relation to the study: "the researcher is an active, not passive, agent in acquiring knowledge of… the research context" (Thomas, 2014, p144). Lakomski (1987, p76) suggests that a researcher's own values are the, "selectors as we decide to study a particular object of social life." One of the paradoxes of research must surely be that it is the very interest or involvement in a topic that can render a researcher subjective or biased in its analysis.

Donnelly's work particularly resonates with this research, not least in her honesty around her own position and identity within the educational community in NI. In the 2004 study she states, "I was aware of my actual (and perceived) identity as a researcher and a Catholic with my own cultural and social baggage" and how this shaped the research process. Murray (1985) suggests that being either Catholic or Protestant in N. Ireland brings with it a set of cultural norms, values and assumptions that the other tradition don't share. Due to these, researchers can find more openness and trust from participants who share their tradition (Donnelly 2000; 2004; 2012).

In addition to my own roles and standing within the educational community, my father was a prominent public figure as a church leader with a clearly-stated ecumenical stance (in four of the interviews he was mentioned). His views are replicated in my worldview and therefore the Catholic/Protestant issues found by Donnelly were not as pronounced for me. It would be naïve to say that they did not exist, however, but they were less apparent because of my known non-sectarian position among the policy-maker participants (three of whom are Catholic) and due to the fact that the area of study was *within* what many perceive to be the 'Protestant' sector.

However, where the issue of identity was more prevalent was with my identity as a Christian. If this was not known amongst participants through personal knowledge, it was assumed through my roles within PCI and TRC: in one of the offers to participate in an interview a principal apologised for being an atheist and in two of the Policy-makers interviews the participant softened their words, presumably lest offence would be caused. In the main, however, this assumption was a useful one in that it allowed participants to be open and honest about matters of faith in education and, "allowed me to understand the hidden meanings and nuances… in a way that perhaps an 'outsider' would have been unable to do" (Donnelly, 2004, p268).

Echoing Donnelly (2012), "I was constantly aware of my own world view and the implications that it held for the collection and interpretation of the research data" (p544). Whilst the roles (and identity) provided access to data and participants, every effort was made to ensure objectivity and this was clearly outlined in the Participant Information Sheet (PIS) agreed with the Ethics Committee at

Lancaster University: "Notwithstanding the roles outlined above, I am approaching the research in a dispassionate and objective way and using it to elicit the views of the participants."

However, objectivity is an elusive concept, especially in an anti-positivist context. Indeed, Snape and Spencer (2003) suggest that postmodernism questions the very concept of objectivity and Patton (2002) believes that trying to distance oneself from the data does not guarantee objectivity, "it merely guarantees distance" (p575). Rather than the quest for objectivity, the reflective researcher should more realistically strive to be the *reflexive* researcher.

Brannick and Coghlan (2007) describe reflexivity as the relationship between the researcher and the research and it has been mainly used in the context of qualitative research, especially interviews (Ryan and Golden, 2016). Reflexive researchers understand that they are not neutral and that they play a part in the construction of knowledge, selectively observing and partially interpreting (Gray, 2014). While the researcher should be empirically and personally reflexive, research methods literature is quite sparse in its advice for how to achieve this (Mauthner and Doucet, 2003), although Cohen et al (2011, p171) are helpful:

> Reflexivity suggests that researchers should acknowledge and disclose their own selves in the research, seeking to understand their part in, or influence on, the research. Rather than trying to eliminate researcher effects (which is impossible, as researchers are part of the world that they are investigating), researchers should hold themselves up to the light.

Lambert et al (2010) suggest that an active self-awareness is a core element of reflexivity, along with a recognition that researchers inhabit the social world that is being studied. Researchers should adopt a continuous manner of introspective reflection on their own subjectivity and values (Parahoo, 2006) and how their, "social background, location and assumptions affect their research practice" (Hesse-Biber, 2007, p. 17). Making, "the relationship between and the influence of the researcher and the participants explicit" (Jootun et al, 2009, p. 45) is central to being a reflexive researcher.

With this in mind, I can acknowledge that, try as I might, my identity, various roles and worldview, especially on matters of faith, cannot but have impacted upon this study. Although the focus of the study was through genuine interest, can I say that I would have considered it if I was neither Christian, nor Protestant? Whilst the research instruments and study sample were chosen for how they would bring insights (Thomas, 2014) to the work, can I honestly say that I remained detached, given that I had relationships with all of the Policy-maker cohort and knew some of the Principal cohort? Indeed, can I say with complete certainty that the questions asked were formulated without an eye for a potential answer? Such epistemologically reflexive questions, "encourage or push the researchers to reflect upon the assumptions… that we have made in the course of the research, and it helps us to think about its implications and findings" (Palangas et al 2017, p432). Throughout the process, I therefore had to adopt a reflexive stance (Whittemore et al, 2001), critically reflecting on my own influence of the study throughout.

Kuhn (1962) discussed the meaning of a paradigm, but, as with policy and ethos, the term has been used in a number of different ways. For example, it might be viewed as assumptions of reality and the very nature of what is being researched (ontology), the nature of how we understand it (epistemology), and the ways of knowing that reality (methodology). In essence, the paradigm is the overarching worldview both made up from, yet simultaneously informing, the ontology, epistemology and methodology. From the origins of each word, ontology refers to the study of existing or being real, epistemology is the study of understanding or knowledge, and methodology is the study of a

systematic course; within the paradigm, essentially *what* reality we see, *how* we see it and how we *go about* seeing it (adapted from Grix, 2010).

One's choice of paradigm entirely influences the study; the choice outlines the intention, motivation and expectations for the research and, without it, there is no foundation for subsequent choices regarding methodology, methods and research design (Mackenzie and Knipe, 2006). The decisions around research questions and how they are crafted, the type of data needed and how they are treated are all influenced by one's worldview.

McLaughlin (2005) states that educational ethos is relatively under-explored by researchers, a point made by Donnelly (2000), who laments, "the relatively few conceptualisations or theoretical discussions of it" (p134). In the same way that, "the term is mostly taken-for-granted with little evidence of explanation, critical reflection or supporting literature" (Graham, 2012, p341), within the world of policy, "more often than not analysts fail to define conceptually what they mean by policy" (Ball, 1993, p10).

The 'how' of ethos begins with an understanding that we have to view it from a particular stand-point, and Donnelly (2000) distinguishes between a positivist and anti-positivist viewpoint. The former suggests that ethos is, "an objective phenomenon, existing independently of the people and social events in an organisation" (p135), whilst the latter is, "the lived reality of classrooms and schools emerging inter alia in social interaction" (McLaughlin, 2005, p311). Bakker and ter Avest (2005) suggest that Donnelly's terms are synonymous with deductive reasoning and inductive reasoning respectively. The outcomes of these respective viewpoints can be described as, "what is *imposed* from top down and what is *generated* from the bottom up" (Green, 2014, p296, my emphasis), or, even more simply, "*formal* and *real* expressions of ethos" (McLaughlin, 2005, p311, my emphasis). This research will define these as a *product* and *process* approach to ethos.

Product approach

A positivist paradigm can be defined as the objective study of the social world, utilising (mainly quantitative) natural science methods within social science, with the specific informed by the general and the researcher's own values removed from the process. The foundationalist, objective epistemological view within the paradigm suggests that there is one discoverable, measurable truth, regardless of one's view of it, and that it is possible for the inquirer to remain at an emotional distance from that and those being studied (Johnson and Onwuegbuzie, 2004). Oldroyd (1986, in Cohen et al, 2011, p9) suggests that it was Auguste Comte who 'invented' positivism, a philosophical position from which stemmed a 'realist' ontological position that the social sciences should approach inquiry in the same manner as the natural sciences, using experiments and, "laws or law-like generalisations" (Cohen et al, 2011, p10) in the search for truth or facts, in the certainty that reality exists in an objective way, even if it hasn't yet been discovered, independent of any theories of human behaviour or beliefs.

Analysis of policy can take a "unidirectional… linear… rational" approach from, "agenda setting through text production to implementation and evaluation" (Lingard and Sellar, 2013, p268). In the study of ethos, Donnelly (2000) refers to this as a *positivist* viewpoint which understands ethos to be something which *prescribes* social reality. It is the formal expression of the aims and objectives, "of those who command authority" (p136), which therefore conditions people to, "think and act in an 'acceptable manner'" (ibid) to uphold the values which are right and proper (Torrington and

Weightman, 1989). Hogan (1984, p694) sees this view of ethos as one in which it is identified with the, "the officially sanctioned standards and requirements of the school authorities" and under which staff are compliant and from which, "daily practice is supposed to be derived deductively" (Bakker and ter Avest, 2005, p352).

However, according to Green (2009), educationalists have become increasingly dubious as to the validity of ethos in an intentional sense. Such an ethos, when prescribed on the basis of religion, economics, results or culture (Pring, 2000), is a very different thing than that which emerges through social interaction.

Process approach

An anti-positivist or constructivist paradigm approach is described as the belief that socially-constructed knowledge is all around, and that all type of information has value, with the specific informed by other specifics and the inclusion of the researcher's values (Thomas, 2014). This interpretivist epistemological approach suggests that knowledge is not there to be found, but to be constructed and that the researcher and participants interact to become co-creators of these findings. The paradigm is manifested in a 'relativist' ontology in which researchers search for meaning in the experiences of individuals, each of whom construct their own reality which is considered correct to them and which is influenced by their experiences and interactions within their social contexts.

Ball's studies of policy rejected an, "oversimplified, linear-hierarchical account and was more concerned with the realpolitik of… actual policy making and policy processes" (Lingard and Sellar, 2013, p268). Likewise, Donnelly's alternative anti-positivist viewpoint sees ethos as emerging from the social interactions which are integral to the life of organisations.

Policy should be seen as a *process*, one which is complex, interactive and dynamic (Sabatier and Mazmanian, 1983; Bowe et al, 1992; Ranson, 1995; Berkhout and Wielemans, 1999) and which looks less at an end-product and more at the contested and complex nature of the process of policy (Vidovich, 2001). Despite the attempts of policy makers to control the meaning of what they write (Nudzor, 2009), their words are, "typically the cannibalised products of multiple but circumscribed influences and agendas" (Ball, 1994, p16).

Ham and Hill (1984) contend that policy can be looked at as a *cycle* of decisions, which is, "repeatedly revised" (Jones, 2013, p8). Considering policy as this, "continuous cycle of policy production and reproduction" (Gale, 1999, p403), where, "generation and implementation are continuous features of the policy process" is known as the Policy Cycle approach (Bowe, Ball and Gold, 1992, p4), a model that, "begins to approximate the messiness of actual policy-making in education" (Lingard et al, 2005, p761). Policies, Ball says, are *ad hoc* (2013), often unannounced, uncommunicated or abandoned through leadership-change; or they can be, "unspoken but generally adhered to because they are (unofficially) part of hegemonic social cultures imperceptible from 'the inside'" (Jones, 2013, p9).

Ethos too, "cannot be maintained purely by an external legal hand, it has to be a living, *constantly regenerating* feature of the discussions in the playground, staff room, management meeting and general meeting of parents" (Rowe, 2000, p173, my emphasis). It is constantly in a state of production and re-production and is, "recognised initially on an experiential rather than a cognitive level" (Allder, 1993, p69). A, "lived ethos" (Hatton, 2013, p160), must be organic and dynamic (Graham, 2012; Coolahan; 2000; McGuinness, 2000) coming from the every-day practices in school. Monahan (2000,

pxxii) suggests that a lived ethos, "has to do with what is occurring, what is being experienced, what is expected, what is hoped for; it is concerned with the experience of relationships, of structures, of policies, of procedures, of roles, of founding purposes - indeed the whole life of a school."

So, the 'how' of ethos begins by understanding the stand-point from which it can be viewed and how this fits into a research paradigm. The 'how' also needs to consider, "the complex interplay of identities and interests and coalitions and conflicts within the processes and enactments of policy" (Ball, 1997, p271) and whether it is possible to analyse ethos.

How it can be researched analytically

Ozga suggests that social policy analysis is firmly, "rooted in the social science tradition" (1987, p144); she calls this *policy sociology*, an approach which, "recognized that policy was more than text and included processes" (Lingard and Sellar, 2013, p267). Ozga's ideas were built upon by Ball (1990, 1992, 1994), who overlaid the foundations for this approach. Troyna (1994, p71) suggests that such an approach unites, "by the conviction that 'things', especially policy discourse, must be pulled apart" and all who engage in it, "lay claim to the influence of critical social science" (Gale, 1999, p405).

So, in looking at ethos how should such an analysis be approached? In order to analyse the reality of ethos, researchers can look to Ball's (1993, p10) advice that analysis must consider, "localised complexity" and, "be accompanied by careful regional, local and organisational research" (Ball, 1997, p262). Any analysis must resist the temptation to, "abstract problems from their relational settings" (Grace, 1995, p3) and should consider, "the deployment of context as an analytical device" (Singh et al, 2014, p827).

Context

Context can be reflected in the micro-politics of schools (Bowe et al, 1992), the attempts at school leaders to filter the policy (Anderson, 1990; Raab, 1994) according to their own view of the educational world (Marshall and Mitchell, 1991), or for them to interpret the wishes of policy-makers by creating rules and regulations for enactment (Berkhout and Wielemans, 1999). The idea of context and place was at the forefront of the minds of Braun, Ball and Maguire (2010) in their concept of enactment, understanding the complexity, sophistication and creativity involved in putting policies into practice and acknowledging how people will interpret and translate things differently.

They identify four contextual dimensions: *Situated* contexts consider history, locality and demographics; *material* contexts suggest the logistics of school infrastructures; *professional* contexts refer to the professional values, commitments and experiences of educationalists; *external* contexts take into account the outside pressures relating to targets, league tables and other policies.

Beginning by firmly embedding education policy analysis in the, "broader field of social policy change" (Ball, 1997, p268), the researcher should ground policy in the realities of buildings, money and power relations (Avelar, 2016) and ensure that they don't, "rip the actors who feature in the drama of education out of the social totality" (p268). This, argues Ozga (2011), is vital as researchers need to be critical of, "the accounts of 'real world' policy from their informants" (p219) or, indeed, their own role

in contributing to the, "narrative offered by the policy community about itself" (Grek, 2011, p234). In order to consider how this 'real world' context impacts upon a study of ethos, it is useful to look briefly at the notions of implementation, enactment, interpretation and translation.

Implementation

It could be argued that the proof of the success of any policy or of ethos is in the implementation of it. Pressman and Widavsky (1984) suggest that implementation is the interaction between goal-setting and actions, with Fitz, Halpin and Power (1994, p53) defining it as the, "structures and processes" within which objectives are put into place.

Trowler et al (2003) suggest that successful implementation occurs when input comes from both the top and bottom of a system. This notion is built upon by Saunders (2006, p210) in his *implementation staircase* metaphor, which suggests that policy is understood and implemented in different ways by those involved, with messages being 'transmitted' up and down the 'staircase' to and from stakeholders who are, "both recipients and agents of policy".

Enactment

However, Ball, "wanted to erase implementation from the language of policy research" (Avelar, 2016, p6), preferring the term *enactment* (Braun, Ball and Maguire, 2010) as a phrase which better reflects the fact that the implementation of policy, "is often a piecemeal process of 'fixing' problems" (Ball, 2015, p309). Ball suggests that the difference between implementation and enactment is that, with the former conceptualisation, a policy is designed, fixed, written down and then either implemented or it fails to be implemented (Avelar, 2016). Enactment, on the other hand, suggests a discursive process in which, "the enacted policy is mediated at each step of the process" (Hardy, 2014, p3) and which liberates policy actors as creative policy producers. Singh et al (2014, p827) suggest that the strength of using enactment rather than implementation is that it denotes the twin processes of *interpretation* and *translation* of policy.

Interpretation is the initial reading, making sense or decoding (Codd, 1988; Ball, 1993; Singh et al, 2014) of policy texts, which are often poorly written, contradictory or problematic, and require, "the creativity of making something sensible out of those texts" (Ball, in Avelar, 2016, pp 6&7). Translation is then a, "re-reading" (Singh et al, 2014, p827) or a, "recoding" (Buckles, 2010, p18). It is the practical side of enactment, in which policy is put into action (Hardy and Lingard, 2008). Ball suggests (Avelar, 2016, p7) and Ball et al (2011a) agree that interpretation is a rationalistic exercise, whereas translation is more realistic; the former is about strategy, whilst the latter is about tactics.

A trajectory approach

Bowe and Ball, with Gold (1992) suggest that, to understand the contexts within which policy is produced, policy production should itself be seen as a *trajectory* which consists of three main contexts: the *context of influence*, wherein, "the public, albeit represented by political parties and other organisations, initiate debate about the how and why of education" (Wilson, 1992, p430); the *context of policy text production*, which is the stage that, "'makes sense' of the official texts so that they are unambiguous and realistic descriptors which are as idiot-proof as it is possible to make them!" (ibid); and the *context of practice*, "where the issue of 'who does what to whom and when' is addressed" (ibid).

The policy trajectory approach seeks to trace the course of policy from its initial stages, to its development and its realisation. It looks beyond a single level of analysis, whether that it is at classroom, school or local authority level to attempt to consider the whole gambit of policy, "across and between levels" (Ball, 1997, p266). Echoing this, Donnelly (2000, p137) contends that any complete picture of school ethos needs to explore how, "the values and beliefs of those in authority" are supported by and reflect those of individual school members. She believes that, "ethos can only be studied in the gap between officially generated ethos and that generated by individuals and groups within a school" (Green 2009, pp198 & 199).

The above sets the theoretical framework for this study: the creation of a single, coherent ethos for the Controlled Sector was considered from a policy trajectory position, which Trowler (2016, p50) defines as, "a research project which follows a particular policy area from its inception through the various phases of implementation and finally collects data on the outcomes it has brought about, if any"; it considered the contexts, the key actors, the process and discourse involved in the development of the ethos for the sector.

The first two sections of this chapter have considered how ethos can be viewed within the context of a research paradigm and how it might be analysed through a policy trajectory approach. The next section looks at how these have therefore informed the methodological approach to the research.

How it was approached methodologically

Ball suggests that we neither make nor create sense of the world by employing one theory or one epistemological position, "because the world is more obdurately complex and difficult than what can be grappled with simply using one position" (Avelar, 2016, p3). Notwithstanding the qualitative methodology which stems from my worldview, given Donnelly's contention that ethos can really only be studied in the 'gap' between the intended and the lived, it was felt that, rather than employ a purely qualitative approach, a study of this nature may benefit from some form of a solid quantifiable base, such as questionnaires, to contextualise and support the collection of further data. Ball (1993, p16) suggests that policy trajectory studies, "employ a cross-sectional rather than single level analysis" and so somewhere between the two aforementioned paradigms was the ideal.

In recent decades, debate has raged over the effectiveness of applying a positivist and/or interpretivist methodology in studies of society and human behaviour (Gage, 1989; Guba, 1990; Denzin & Lincoln, 1994). The subsequent period has seen the ascendency of qualitative over quantitative methods (Denzin, 2008; Cohen et al, 2011), but has also heralded the emergence of a paradigm called pragmatism, or mixed-methods research, in which, "the researcher mixes or combines quantitative and qualitative research techniques, methods, approaches, concepts or language into a single study" (Johnson and Onwuegbuzie, 2004, p17).

It is acknowledged that the appropriateness of mixing methods within a single study has been questioned (Tashakkori, Teddlie and Teddlie, 1998), with purists suggesting that using both is, "theoretically impossible since their foundations are non-congruent and mutually exclusive" (Morris and Burkett, 2011, p27), leading to flawed research due to the irreconcilable philosophical differences

between the paradigms from which they stem (Guba and Lincoln, 1994). However, Ball (2006, p1) eschews such a, "perceptual straightjacket" and pragmatists such as Cresswell et al (2003) suggest that the *usefulness* of a mixed-methodological approach is of more importance than the philosophical debate, subscribing to a paradigm relativism which holds the needs of the research and research questions above devotion to a paradigm (Howe, 1998): "epistemological purity does not get research done" (Miles and Huberman, 1984, p21).

In a response to Mactavish and Schleien (2000), who suggest that a mixed-methods approach is, in fact, a mixed-up approach, Guba and Lincoln (2005) opine that it is possible to blur the lines somewhat between paradigms so long as the researcher is clear about the underlying ontological position. "Epistemologies and ontologies may clash and grate but the resultant friction can be purposeful and effective… in providing different lenses through which to see and think about the social world" (Ball, 2006, p2).

According to Johnson and Turner (2003) and Johnson and Onwuegbuzie (2004), the goal of such an approach is to draw from the strengths and minimise the weaknesses of quantitative and qualitative methods rather than replacing them, offering pragmatism as a, "complementary philosophical partner" (Johnson and Onwuegbuzie, 2004, p14), and agreeing with Guba and Lincoln (2005) that the research methods should follow research questions in a way that offers the best chance to obtain useful answers. A mixed-methods approach is therefore useful in looking for convergence; inter-connection or distinction; similarities, contradictions or new ideas; complementarity of methods; or adding breadth (Greene, Caracelli and Graham, 1989). Johnson and Onwuegbuzie (2004) suggest that researchers need to be creative and eclectic in their approach, using a variety of strategies, approaches and methods to elicit a combination of types of data to provide a more complete picture (Creswell and Plano Clark, 2010; Johnson and Turner, 2003).

In this research, the views of a representative sample would enable an hypothesis to be made, but it was felt that, due to the fact that there are 558 schools, a more quantifiable response would also be helpful. Whilst my ontological position dictated a qualitative approach based around a deep analysis of the views of the sample, there was a need for, "a different kind of epistemological apparatus to make sense of those messy and disordered realities" (Avelar, 2016, p4) and a degree of breadth would add a richness and further dimension to the depth. These two approaches are not incompatible with each other: whilst quantitative research is normally used for testing theory, it can also generate hypotheses, and whilst qualitative work usually generates theory, it can also test hypotheses (Punch, 1999).

In using both quantitative and qualitative methods, Cresswell and Plano Clark (2007) suggest that the researcher needs to consider the timing, weighting and use of the methods in respect to each other. They classify mixed-methods designs in four ways: the *triangulation* approach merges the data together with an equal weighting; the *embedded* approach sees one set of data as secondary, supporting the main one; in the *explanatory* approach, qualitative data provides answers to questions raised in the quantitative stage; and in the *exploratory* approach quantitative data provides breath to the qualitative responses.

The final section outlines how the methodology above was utilised in the gathering of data for the study.

How it was carried out empirically

This research study subscribed to Cresswell and Plano Clark's (2007) *exploratory* and *embedded* designs, employing a mainly qualitative approach in the form of interviews, supplemented and supported by a large scale survey. Following Collins et al's (2006), two-dimensional mixed methods sampling model, it took a concurrent approach, where the two phases were conducted separately, with the data integrated during the analysis stage. There was an element of nested design, wherein, "the sample members used in one phase of the study represent a sub-set of those chosen for the other component of the study" (Gray, 2014, p227), in this case the Principal cohort interview participants representing a sub-set of the 138 principal respondents to the survey. Gray suggests that it is acceptable within a concurrent design to take this approach as, "although one phase followed another... one phase did not *inform* the other" (ibid).

Questionnaires

A questionnaire was designed to elicit the views of principals of the 558 Controlled schools, comprising 73 closed questions, recommended by Cohen et al (2011) as quick and straightforward for respondents. The questions included those that were dichotomous, multiple choice, Likert type rating scales, rank order and discrete single answer. Oppenheim (1992) highlights that highly structured, closed questions allow comparisons to be made across groups in the sample. Due to the sample size, it was always the intention to create this as an online survey; this proved to be an effective and realistic way of ensuring a good delivery and response rate. The survey was created using the *Smart Survey* package, which facilitates easily the creating of the questionnaire, and the gathering and analysing of data. As my institution has a licence which allows for targeting groups of up to 1,000 respondents, permission was sought and granted for its use.

The questions were grouped under the section headings: *You and your school* (essentially an identifier section); *Policy; Ethos – your school; Ethos – the CS; CSSC;* and *Churches' role in education*. After piloting, however, it was felt that the first substantive set of questions, on policy, should be moved as the questions took a little more thought than those of the two sections on ethos. Keeping it first might immediately put off respondents, who might then give up on completing the survey, whereas moving it to become the third section would ensure that respondents were in their flow and committed enough to want to see the survey through.

Oppenheim (2000) and Rubin and Babbie (2011) stress the importance of piloting any research collection material to ensure it works as intended. The questionnaire was initially piloted amongst 6 professional colleagues from the perspective of its effectiveness as a research instrument. These colleagues comprised the Director of Research, the REF coordinator, the Research Impact coordinator, the module coordinator for Research Methods, a colleague noted for his expertise in questionnaire design (and pedantry over English language) and a colleague who has researched extensively and written on the research subject. The process led to a number of other changes to the questions themselves, from grammatical correctness to consistency of wording.

A further pilot was carried out with a local principal which added a most useful dimension to the process. One of the aims was to look at the length of time taken to complete as this was to be included in the initial email to school principals. It was important to maximise the response and completion rate, therefore the inclusion of an approximate time for completion was important. Another element related to this was the ability to include a progress bar across the top of each page of the survey. There is conflicting research evidence on the correlation between employing a progress bar and completion rate (see, for example, Conrad et al, 2010; Couper et al, 2001; Yan et al, 2010), however Yentes et al

(2012, p6) suggest that such an inclusion can result in an, "increase in data quality through the mechanism of user focus". An incidental, but no less important element (Dillman, 2000) was to consider the attractiveness and user-friendliness of the survey in order that respondents would wish to engage with it.

The other aim was to look at the contents of the questionnaire from the perspective of the respondents, who were not academics used to creating and assessing research instruments. Changes included removing elements from questions which seemed incongruent, joining questions together, adding phrases for greater explanation and removing options which were unnecessary. During this piloting session, the 'respondent' was observed and timed, initial and immediate comments during the completion process were noted, and a discussion was held afterwards.

In conversations with principals, it was stated that they receive 8-10 invitations each week to participate in online surveys. A realistic target was set of a 25% response rate (n=140), with the hope that it would reach 30% (n=167). In order to maximise the response rate, four emails were sent to all of the Controlled Schools. The dates, days and times of these were chosen carefully to ensure that they would be read and acted upon.

The first was sent on a Monday afternoon and was quite formal in tone, outlining the key information, providing the web link and attaching an information document. In the first and final substantive paragraphs, there was an acknowledgement of the busyness and stress of principals, "flattering the participants without being seen to flatter them" (Cohen et al, 2011, p233), thereby establishing credentials as someone empathetic and knowledgeable in the field of education. This was consolidated in the email signature and attachment, again establishing my position within the educational community and highlighting that the study was a 'proper' academic one.

The follow-up emails were sent on a Friday afternoon at the start of December, a Friday morning in mid-January and a Wednesday afternoon in early February. The tone of the first was light, thanking those who had participated and 'reminding' those who had, "not yet managed to find the time, in [their] extremely busy and increasingly fraught lives" of how invaluable their insights would be. The second was conversational, with half of it being about recent disruption to schools due to weather, again establishing empathy. It then thanked those who had participated, citing over a hundred as a suggestion of how important they had seen the issue, and then issued a reminder to others that they still could. The third was sent two days before most schools closed for half-term and a week before the rest did. Rather than beginning with thanks, it opened with the fact that the survey was soon to close to impress this upon those who hadn't responded, before thanking and reminding of how to complete.

In addition to the emails, other methods were employed to ensure a reasonable response rate. Just before the survey opened, I asked that colleagues on the CSSC Board use their various networks of influence to promote it. The Head of Marketing at CSSC was also approached to publicise it and the research was signposted in the November bulletin to all principals. The secretaries of a number of area learning communities were also asked to publicise the survey amongst their members.

At the close of the survey the response rate was 24.7% (n=138 out of a potential 558 schools).

Interviews

Ball (1990) states that the basis for his view of education policy, "has consisted of interviews" (2006b, p4) and Grek (2011, p233) suggests that, "interviewing is one of the most common methods of conducting qualitative research on education policy communities." Donnelly (2000, p138) suggested

of her work that, "Given the intricate and complex nature of ethos it seemed more logical to use a method which allowed the researcher to get as close to the subjects as possible."

Kvale and Brinkmann (2009, p1) suggest that interviews allow the researcher, "to understand the world from the subjects' point of view, to unfold the meaning of their experiences, to uncover their lived world." This is echoed by Johnson and Christensen (2001) who believe that an interview can get to the nub of a participant's own thinking in order for them, "to express their perspectives" (p33) through the use of, "their critical voices" (Klenke, 2008, p12). This, "interchange of views between two persons conversing about a theme of interest" (Kvale and Brinkmann, 2009, p2) can give a valuable, "insight into how people interpret and order the world" (Mack et al, 2005, p30).

Following Ball (2006, p4), it would seem that the, "most obvious, but not sole, basis of my account… [should be] a set of interviews with primary actors in the policy-making field." This entailed the selection of key figures in the world of policy at the time of the creation of the CSSC, but also the 'primary actors' who would be involved in the front-line of the enactment of the CSSC's Vision Statement, namely the principals of a range of Controlled schools.

The use of the interview allowed me to, "collect information that cannot be reduced to number" (Walliman, 2013, p143), but which would be complemented by the more quantitative data elicited from the questionnaire respondents. The approach taken was to create a semi-structured interview, which would, "give the best of both worlds as far as interviewing is concerned (Thomas, 2014, p164), allowing for the co-construction of the interview (Walford, 2001).

In an attempt to ensure that the questions were clear, easy to understand and without bias (Ziniel, 2010), the schedule was again piloted by the 6 professional colleagues and local principal. As with the questionnaires, much useful assistance was given with the order, grammatical correctness, bias-elimination and ease of use.

The 11 questions and 11 follow-up questions fell under 5 main areas: the participants' understanding of ethos; the nature of ethos in the CS; their views on policy and its link with ethos; the link between faith and ethos; and the role of the churches in education. Following a response from the first interviewee in which was mentioned influence being about power and control, an additional question was asked regarding who participants believed control the ethos of the Controlled Sector and who should.

As it is important for the interviewee to trust the interviewer (Grek, 2011) and for them to feel comfortable and confident (Ziniel, 2010), the interview was agreed at a time and place convenient to the participant (for the Policy-maker group, this resulted in one interview in my office, one in a participant's home, and the other six in the participants' offices; for the Principal cohort, each took place in their schools). All took place at a time mutually convenient and all during the participants' working hours.

Wilkinson and Birmingham (2003, p47) noted that if, "you rely on memory and a pad of hastily scribbled notes" essential information will be lost, so the *HT Recorder+* app for iPad was used to record all interviews. Prior to beginning, as outlined in the Ethics section, a short conversation was held, the issue of voluntary consent was dealt with, permission was sought regarding audio recording and a suitable identifier was agreed upon.

Sampling Strategy

> The quality of a piece of research stands or falls not only by the appropriateness of methodology and instrumentation but also by the suitability of the sampling strategy that has been adopted.
>
> (Cohen et al, 2011, p100)

After considering the research instruments to be used, it was therefore important that careful consideration was given to the people with whom they would be used. Blaxter et al (2010, p170) give a useful and concise breakdown of the main types of sampling. Probability sampling includes simple random; systematic (selecting every *n*th case); stratified (within groups of the population); cluster (whole clusters of the population sampled at random); and stage (clusters sampled at random) sampling. Non-probability sampling includes convenience (those most convenient); voluntary (self-selecting); quota (convenience within groups of the population); purposive (hand-picking supposedly typical or interesting cases); dimensional (multi-dimensional quota sampling); and snowball (building up a sample through informants) sampling. They also describe event sampling, which uses routine or special events as a basis for sampling, and time sampling which recognises the significance of different times during the day, week or year.

Whilst some form of random sample would have been the ideal, especially as it is the more representative form of sampling, Black (1998) suggests that this only really works effectively when all of the subjects participate, lists are accurate and equivalence is possible. Given the busyness of school principals and the potentially small numbers of those who would be able to participate, probability sampling was therefore discounted.

Gray (2014) suggests that, for qualitative research, it is most common to use a purposive non-probability sample as it, "seeks to obtain insights into particular practices that exist within a specific location, context and time" (p174). Although such an approach has been criticised for being, "not easily defensible as being representative" (Black, 1998, p118), it does ensure a balance of group sizes, the selection of adequate numbers and the possibility of including under-represented or hard to reach groups (ibid). Gray also suggests that, "very often it is not a case of selecting between the various approaches but combining some of them" (2014, p174) and this will be outlined in the paragraphs below.

My sampling method was three-fold: as outlined in detail above, the most straightforward was that of the survey, which was sent out electronically via an email link to the entire population of Controlled Sector principals; the participants for interviews were split under two categories: Policy-makers and Principals, using aspects of purposive sampling, guided by Cohen et al's (2011) three principles for recruiting participants: their experiences of place, time and ways of talking about their experiences, ensuring that they, "share the experience being investigated" (Graham, 2012, p342), with the latter chosen through volunteer (or voluntary) sampling (Blaxter et al, 2010; Cohen et al, 2011; Gray, 2014).

For the first cohort it was important to consider carefully the choice, as, "there is little benefit in seeking a random sample when most of the random sample may be largely ignorant of particular issues and unable to comment on matters of interest to the researcher" (Cohen et al, 2011, p157). It was decided to aim high and to try to gain access to the most senior levels of those who create, influence and contribute to policy and who were active at the time of the creation of the CSSC. In the political sphere the two politicians from the two main parties (DUP and Sinn Fein) who had held the most senior education portfolios at the time were approached and interviews granted. A senior official from the Education Authority and from the CSSC participated. Two former Education Secretaries from

the two largest Protestant denominations (PCI and CoI) participated in interviews. One member of the TRC, with a wide range of experience at educational administration board level, and the N. Ireland Director of the UK's largest education union completed the 8 interviews.

In their studies of understanding policy contexts, Issakyan et al (2008) and Grek (2011) undertook research with the policy 'elite' in Scotland, a community much like N. Ireland in size and culture. They found a, "small and tightly networked 'policy community'" (Grek, 2011, p234), with, "informal relations that are maintained through relatively frequent contacts among all these actors" (Issakyan et al, 2008, p24). It is down to a comparable environment and these kinds of relationships that the interviews were quickly agreed to and easily arranged. Given my past and current representative and advocacy roles within the education policy landscape, a personal and/or professional relationship existed with each that was useful for securing participation in the study. This position also ensured, "trust of the interviewer by the interviewee… by showing familiarity with the assumptive world of the interviewee" (Grek, 2011, p239).

The second cohort of interviews was taken from those who had volunteered in response to the online questionnaire. In the initial email to them and in the attached document, an invitation was issued for those who might wish to participate to make contact. There were 20 contacts made (8 primary, 4 secondary, 4 grammar, 2 special and 2 nursery), from which the same size of sample to the Policy-makers was created. The Controlled Sector is comprised of 69% primary schools, 10% non-selective secondary schools; 3% grammar schools; 11% nursery schools; and 7% special schools. Therefore the sample was stratified to create a reflective representation of this and comprised 4 primary school principals and 1 from each of the other phases.

Each of the Policy-maker participants was chosen carefully because of their personal experiences and involvement in the world of policy at the time of the creation of the CSSC. They each brought their personal views to bear on the research, but none of them would have had these experiences and involvement if they were not representatives of their organisations or types of organisations. Therefore, they were selected less as people and more to be representative of the field of policy-makers and of their organisations or types of organisation. Likewise, the purposive sampling exercise for the Principals cohort saw the participants as representatives of the field of Controlled schools' principals and, to a lesser degree, of their phases. They were not viewed as representatives of their schools, in that the online survey covered questions relating to this field and gave them this opportunity.

Understanding the potential unrepresentativeness of volunteer sampling where, "one has to be very cautious in making any claims for generalizability or representativeness" (Cohen et al, 20111, p116), in selecting the Principal participants, a stratifying process of criterion sampling (Gray, 2014) was created and applied in order to arrive at a viable sample. These criteria were, in order of importance:
- A geographical and population-distribution spread throughout NI;
- Schools that were representative of their phase;
- Excluding principals who were involved with the work of CSSC;
- Excluding principals with a stated faith position;
- Excluding principals personally known to me.

The process could also be said to be typical case sampling as the eight Principal cohort participants were selected a) because they were part of the 20 who volunteered and b) because, "they represent and are 'typical'" (Gray, 2014, p217) of the population of Controlled school principals. As per the statistics above, they represented the five largest phases of the Controlled Sector. No participants from the Controlled Integrated or the Irish Medium phases were considered a) because none volunteered; b) because these schools comprise 4% of the total Controlled Sector population (with

the Irish Medium phase accounting for only 2 of the 558 Controlled schools); and c) because my purposive process began from the foundation of volunteer sampling.

As no principals from these phases volunteered, I could have utilised a boosted sample method, described by Gorard (2003) as useful when a specific section of the research population is under-represented because they are so few in numbers. Likewise, I could have opted for a convenience sample, in which I specifically targeted principals from the Controlled Integrated and Irish Medium phases. The advantage of this would have been that, regardless of size and representativeness, each discrete phase would have had a voice in the research. The disadvantage, however, could have been that, "the downside is that convenience sampling is neither purposeful nor strategic, and therefore has the lowest credibility of all the qualitative sampling designs" (Gray, 2014, p224).

There is no doubt that both of these phases would have added a richness and depth to the data, given their cultural context, however, I believe that there would have been ethical issues over validity had I sought out specific schools and I would have had to ensure that I was cognisant of the issues of the potential for over-representativeness and that this was accounted for.

Of course, it is acknowledged that purposive sampling too has its problems; whilst it cannot be said to be fully representative, Thomas (2014) suggests that interpretative research is about gaining insights rather than generalisations and Cohen et al (2011) agree: "this is not the primary concern in such sampling; rather the concern is to acquire in-depth information from those who are in a position to give it" (p115). These principals are people, with personal experiences and opinions which coloured their answers. Whilst each was apprised of the above research position prior to beginning the interview, it was expected that they would draw on their own school life as a source of inspiration for their answers. However, it was in an attempt to minimise this, and to see them less as individuals and more as representatives, that the criteria included the latter two.

The process began with the most straightforward decisions and worked to the most difficult, as follows:
- Nursery - two contacts, one of which was from a CSSC Board Member, therefore the other was chosen. The school is situated in a large county town in North Antrim.
- Special - two contacts, one of whom stated a faith position. The other selected on these grounds and also as it was the only school situated on the North-west border.
- Secondary - four contacts, one of whom was a former CSSC Interim Board Member, one of whom is personally known to me. Of the other two, the one selected is the only school situated in the southern border area.
- Grammar - four contacts, one of whom is a CSSC Board Member, one of whom is head of a single-sex school. Of the remaining two, the one selected is a medium-sized Belfast school.
- Primary - eight contacts, six of whom are known to me, therefore it was decided to opt for the best geographical spread. The four schools therefore represented Belfast, a school serving a socially-disadvantaged population in a town on the east coast, a rural school in the mid-North-west, and a school in a commuter town in mid-Ulster. These four included the two principals not known to me.

The respondents to the online questionnaire comprised the principals of the 558 Controlled schools in NI. The initial idea was to ask the CSSC for use of their email list, in exchange for access to the results, but upon reflection this was abandoned for two reasons. Firstly, it was felt that this would put the CSSC in an invidious position as they are asked by many actors to allow piggy-backing on their distribution list. Given my position as Vice-chair of CSSC, it would be more awkward to decline, yet would set a precedent. In addition it would link the research and researcher to CSSC in a way that would be unintended. Secondly, a list of all school email addresses existed within my place of work

from which it was easy to extract the Controlled schools. In sending it out from the college it established my identity as a member of the academic community rather than as an office-bearer of CSSC.

Ethical considerations

Throughout the research, the, "professional and moral responsibility" (Burton et al, 2011, p86) to ensure that ethical considerations were adhered to was paramount. No empirical data-gathering was embarked upon without first receiving permission from Lancaster University's FASS-LUMS Research Ethics Committee, a process which involved considering all aspects of the research and included revisions in light of comments and requests for clarification.

Given my employment within Initial Teacher Education and the standing of the institution within the small educational community in NI, it was important to acknowledge that the reputation of Stranmillis, as well as Lancaster, needed to be taken into consideration, both in the academic rigour and in the ethical approach undertaken. The research went before the college's own Ethics Committee and permission was sought from it to use the college's account for *Smart Survey*, along with proof of ethical approval from Lancaster.

The Researcher

> Within the context of creating studies and formulating facts the researcher is neither detached nor objective and the interchange between the researcher and the researched is often neither natural nor neutral. As such, he/she needs to be aware not only of the values and beliefs of those being researched but also of their own ideas, values and perspectives.
>
> (Donnelly, 2004, p267)

It was therefore imperative that my own position was clearly stated and this was done in a number of clear ways: in the attachment to the initial email seeking questionnaire responses, my involvement in the areas of TRC, PCI and CSSC were clearly stated, "In the interests of full disclosure in relation to the content of the research", along with the link to Stranmillis in the email signature. Following the phone calls to interview participants or their representatives, the confirmation emails contained the PIS, which clearly outlined the same information in the first paragraph.

Before beginning (and also in the course of two) interviews, participants were informed that the roles held were stated in the interests of full disclosure, that the data collected will be of interest to TRC, PCI and CSSC, but that the research was not carried out on their behalf, nor should any assumptions be made on the researcher's views regarding the area of study. This follows Donnelly (2004, p267) who stated about her own work on ethos, "The sensitive nature of the topic was a major concern during the research and it was important that interviewees felt safe to reveal their true values and ideas. For this reason a short informal conversation was held with each participant prior to the interviewing."

One of my identities is also now that of an academic. An additional, and most helpful element resulting from this this has been the involvement of the Stranmillis Research and Scholarship department. Due to the funding provided by the college, there is a requirement to meet with the Director, Research Impact Coordinator and Research Administrative Officer at regular intervals to keep them updated on progress. These meetings have proved to be useful times of reflection, as has been the provision of a Research Mentor who can be called upon for advice. In addition, the college's relationship with its

Visiting Professors and the department's creation of opportunities to meet and discuss with them has been of great benefit in promoting an attitude of reflexivity. The very fact of working in an academic environment has proved to be most beneficial as colleagues with a wealth of experience in research have been called upon for advice around issues of protocol, practicalities and ethics.

The Participants

According to BERA (2011, p5), prior to undertaking a research project, "researchers must take the steps necessary to ensure that all participants in the research understand the process in which they are to be engaged, including why their participation is necessary, how it will be used and how and to whom it will be reported."

- Voluntary informed consent

This was done through the following: potential respondents to the online questionnaire were sent four emails inviting survey response and participation in a follow-up interview, with an attachment outlining the nature of the research and how their participation would assist it. The Policy-maker and Principal interviewees (or their representatives) were initially contacted by phone, followed up with an explanatory email, attached to which were the PIS, an Interview Schedule and a Consent Form. As per BERA guidelines (2011, p6), participants were informed that they could, "withdraw at any time for any or no reason" during the course of their participation, but, as per advice from Lancaster, only two weeks after participation was concluded.

- Anonymity

For the questionnaire respondents, anonymity was ensured in that there is nowhere and no mechanism on the survey to input either the name of the respondent nor their school. Potential respondents were also assured of their anonymity in the initial email and in the attachment, which stated, "Your response will be entirely anonymous and I have no way of identifying you." This was further underscored in q30 which prompted a personal response to the question of faith underpinning any sector-wide ethos and which began, "*For the following, please remember that I have absolutely no way of identifying you or your school."*

Anonymity was trickier with the interviewees. The Principal cohort was straightforward as the only form of identifier was Special Principal (SpP), Nursery (NurP), Secondary (SecP), Grammar (GramP) and the four Primary principals (PrimP1-4, allocated in order of the interviews). For the Policy-maker group, however, despite an identifier agreed with the participant at the outset of the interview, the words spoken by the participant could very well lead a reader to quickly ascertain their identity. Lancaster (2017) identifies this problem, citing research in which some of the participants comprised, "a small core group of individuals [who] had led the process" (p98) being investigated and that, even if they weren't known publicly, they were known to the other participants, who made assumptions about who was involved in the study. Therefore, it is the job of the researcher to ensure that the data is handled with care: "In this context of close professional and personal networks, where a small number of individuals had been involved in particular processes or events, I was aware that anonymising data through the use of pseudonyms would not be sufficient to ensure that particular voices would not be recognised by others within the field" (p99).

The attempt to assure them of anonymity became the subject of much debate with the FASS-LUMS Ethics Committee, resulting in a clear statement in the PIS:

As you are very aware, the world of education policy in N. Ireland is a small one. It is important to note that, despite all my best efforts, there is a possibility that, should someone wish to try to work out the identity of participants, you may still may be identified due to this constrained nature of the research environment. Please be assured, however, that any identification will not be on my part and that I will do my utmost to ensure anonymity. I will do this by endeavouring to keep all personal information about you (e.g. your name and other information about you that can identify you) confidential, that is I will not share it with others. I will remove any personal information from the written record of your contribution. At the outset of the interview, I will agree with you a suitable 'identifier' (eg "a senior civil servant", "a church spokesperson", etc).

It was interesting to note that, whilst this 'constrained' environment was explicitly identified and the participants were practised in the art of choosing their words with an eye to being quoted, there was a somewhat cavalier attitude to their maintaining anonymity. In the small world of NI, it is not difficult to work out who a 'politician' is if they state their religious persuasion and a specific role that they have had during the course of the interview, nor a 'senior education official' should they mention the name or purpose of their organisation and then allude to themselves as the head of it.

Nonetheless, through the use of an agreed identifier and by omitting any personal information, there was a concerted attempt, within the parameters of the above paragraph, to ensure anonymity. This resulted in the two politicians and two Church Education Secretaries being identified as such and in order of interview (Pol1; Pol2; ChEd1; ChEd2), the two CEOs self-identifying as Senior Education Officials and, again, in order of interview (SEO1; SEO2), the trade union official being identified as TUO and the final interviewee self-identifying as an Education Consultant (EdCon).

- Confidentiality

Questionnaire data was retained on the specific project item from *Smart Survey* held under license to Stranmillis University College, with only me having the code for this specific item of research. Interview audio recordings were on the *HT Recorder +* app on my work iPad, which is password-protected. Transcription was carried out by two professional contacts, who signed Confidentiality Agreements. Transcripts were held on my work laptop and desktop and one work USB, all of which comply with college policy of being password-protected.

It was made clear in the initial email and in the attached information sheet to potential questionnaire respondents that, "Not only will your assistance in completing the questionnaire be of enormous help to me in my research, but will be of great use to the Churches as they seek to evaluate their work within the sphere of education, and also to the CSSC as it works towards developing and maintaining the ethos of the CS." In the PIS provided for interview participants, it was also made clear that the information would only be used for research purposes, including the thesis and any resulting publications, academic conferences, or policy-making fora and that any quotes would be anonymised.

Analysis

The data gathered is presented in the next chapter following a thematic analysis, utilising the six steps identified by Braun and Clarke (2006), in which the researcher should become familiar with the data; generate initial codes; search for themes; review themes; define themes; and present the findings. Cohen et al (2011) suggest that there are three main ways to analyse (mainly qualitative) data: by

groups, individuals, or issue. Focussing on individuals, the analysis began with what Parlett and Hamilton (1976) refer to as 'progressive funnelling', utilising the suggestion of Miles and Huberman (1984) that it is important to display data carefully in order to begin the process of reduction. Distilling the c.90,000 words from 16 interviews began with colour-coding each transcription and then going through each individually and tabulating each salient point as it arose, cutting and pasting across to a new document and using bullet points for ease of reading.

This coding process of, "disassembling and reassembling the data" broke it down into lines and paragraphs, which were then rearranged, "to produce a new understanding" of the data (Ezzy, 2000, in Cohen et al, 2011, p493), as per the picture below:

Employing a constant comparative method, each interview was then scrutinised using open coding (Cohen et al, 2011), with key words and phrases tabulated under the headings generated by analysis of the previous interviews and, "creating new codes and categories and sub-categories where necessary, and integrating codes" until the coding was complete (ibid, p493).

This process resulted in removing extraneous words to create 137 pages of c.66,000 bullet-pointed, colour-coded words and phrases tabulated under 317 initial codes. These codes then were re-organised into 15 emerging themes although, at the writing stage, it was felt that some of these naturally flowed into each other, resulting in the following 9 superordinate themes:

Superordinate theme	Original theme
Ethos	Ethos
Controlled Sector	CS
	Other sectors
	Education and educationalists
	Educational Bodies
Ethos of the CS	CS ethos
The Protestant Churches	Churches
	RE and Collective Worship
A single ethos	A single ethos
CSSC	CSSC
Vison Statement	VS
Society's Vision	Faith, religion and Christianity
	Parents
	Values
Policy and ethos	Policy and ethos

During writing, this data was analysed further within specific codes to identify comparable words, phrases or ideas to incorporate into the flow of writing, as the picture below demonstrates:

This was then supplemented with the data from the questionnaires, with answers from relevant answers populating and adding breadth to the corresponding codes.

It is hoped that this research may have an impact upon the unfolding debate on the ethos of the CS. However, it must also be acknowledged that, "although policy analysts engage in legitimate research endeavours, it should be understood that policy makers will use that research to promote positions that endorse their own particular values" (Berkhout and Weilemans, 1999, p405). This was a further spur to my reflexive awareness of how my own values could colour my interpretation of the research

and how this interpretation could be used by others in ways not intended. I have therefore attempted to keep this awareness to the fore in the presentation and analysis of the results of the research.

In so doing, it is acknowledged that, although my identity, positions and worldview are bound to have coloured the data *gathering* process, it was elements of the *findings* that most engendered a reaction based upon them during analysis. This ranged from confirmation of assumptions, to being surprised – at times positively – by the outcomes. I admit to being moved by the passion of the participants, especially the Principal cohort and to feelings of injury and, at times, anger as they spoke of perceived inequity, isolation and a lack of support. However, another element to reflexivity is maintaining an academic distance (Palangas, 2017), retaining, "the ability to see through participants' narratives and preserve the capacity to identify contradictions and issues in participants' responses" (p432).

> …whilst I may have difficulties in remaining detached from the data, I can argue that a 'reflexive' awareness of my… identity throughout the research process did go some way to promoting validity and so challenging any preconceptions or 'research baggage' that I may have brought to the research field.
>
> (Donnelly, 2012, p544)

Findings

Ethos

What is it?

The starting point of this study is the understanding of the concept of ethos. The participants began by describing the difficulties around defining such a, "small word for a very broad range of meanings" (SpP), with Pol1 and SpP bemoaning its breadth. Pol2 suggested that it was, "hard to put a label on", ChEd1 and ChEd2 used the term, "nebulous", ChEd2 stated that it couldn't be pinned down and PrimP3 believed that it is, "more an over-arching term." It can be interpreted in different ways by different people (Pol2), with some looking at it from the religious, spiritual, cultural, societal or broadly educational, whilst others view it as specifically academic or specifically politically ideological (Pol1), others see it as historical (SecP) and some consider it to be about morals and beliefs (PrimP4). Both PrimP4 and NurP agree that it is about what an organisation stands for, acting as a, "barometer" (NurP) by which it can be judged.

This difficulty, the participants argue, is exacerbated by a lack of definition, clear articulation of it, or understanding that such an articulation strengthens the hand of organisations in determining what they stand for (Pol1; PrimP4; Pol2; EdCon; ChEd2; PrimP4). Ethos is implicit, imperceptible and unconscious, but every organisation has one (Pol1; TUO; SEO1) - a point reinforced by the 94.2% (n=130) respondents who believed their school does (q6) – and, "like a good piece of art, you know it when you see it" (TUO).

Pol1 suggested that ethos is, "a belief system," or value system underpinning the culture of the school which then results in a tangible, "experience" ((ChEd2; SecP; PrimP1) for those involved in an organisation, which comes from the environment, or atmosphere that results. Ethos is at the core of an organisation, an, "unsaid set of principles" (TUO), "a framework, a structure, a basis on which all of the procedures, policies and other agendas" (GramP) of a school are built upon. "Ethos transcends everything the schools does" (SEO1), it is the foundation upon which everything is built and, "everything we do permeates from that ethos" (PrimP4): quite simply, ethos is really just the way we are and the way we do things (TUO; ChEd2; GramP).

What is its purpose?

Ethos is the driver, the frame of reference, the system or set of values, the, "guiding principles" (TUO; PrimP2) which, "provide a rationale for why things are done in that way" (GramP). It is the, "foundation" (PrimP4), structure and skeleton that, "underpins" (SEO1; EdCon) and binds schools together, "a direction in which to travel" (PrimP4) that defines one's expectations, giving a, "collective understanding… a shared identity and a sense of meaning" (SpP). It speaks of welcome, assurance, acceptance, involvement, inclusivity, value, respect, encouragement, caring, sharing and integration for those who come into the school, "so that they can become part of that ethos" (SecP) and stay part of it long after they have left.

"All embracing" inclusion (EdCon; PrimP3; NurP), respect, understanding and acceptance were deemed to be the core purpose of ethos, along with a recognition of how this is to be practically modelled or displayed, through the building up of positive relationships, especially with those of different abilities, creed or colour.

What is it linked to?

Ethos should, "go hand in hand" (EdCon) with *pastoral care*; together these underpin the holistic, wrap-around service provided to children, families and the local community and this *context* was something which was linked frequently to ethos. Within the knowledge that the values of schools and communities can differ, school ethos can be determined and shaped by local communities and should be reflective of them and their needs, whether that be in the context of urban as opposed to rural, primary as opposed to post-primary, or Protestant as opposed to Catholic.

The participants also linked ethos to a variety of other terms such as *culture* (SEO1; ChEd2; TUO; PrimP2; SpP), *atmosphere* (SEO1; PrimP1; EdCon; ChEd2; PrimP3; SpP; NurP), *environment* (SEO1; EdCon; SEO2; GramP), *mission* (PrimP1; PrimP2; GramP; ChEd1; ChEd2), *spirit* (ChEd2; SpP), *climate* (PrimP2) and *character* (ChEd1). Mostly clearly articulated was the link between ethos and *values*.

ChEd1 believes that ethos and values are, "interchangeable": ethos encapsulates, articulates and shapes the core values of a school, at the same time as it shares, shapes and challenges the values of the school community. The linkage with values became more focussed into a link with "Christian values" (SEO2; ChEd1; GramP; NurP), and the majority of participants considered that ethos, as it pertains to Controlled schools, is intrinsically linked to the values that Christian faith brings (Pol2, TUO, PrimP2).

How is it manifested?

> You know when you can cut with the grain and you know when you're cutting against it; that's when you know that's what your ethos is (TUO).

PrimP2 believes that ethos, "is purposefully designed rather than something which is arrived at by drift", a point echoed by TUO, SEO1, PrimP3 and PrimP4, who all spoke of its being *written down*. This was reflected by the respondents, 91.79% (n=123) of whom stated that their ethos was definitely or largely publicly articulated (q9), with the most popular option selected (83.09% (n=113)) being their schools' mission statements (q10: *How and where is it articulated?*). The next most popular choices were website, policy documentation, Annual Report and corridor displays. Other written articulations cited by the respondents (n=37) were the school prospectus, magazine, newssheet, School Development Plan, posters, advertising campaigns, staff and pupil survey, and social media.

It became clear from the research that there was a tension between the formal articulation of ethos and that which permeates the everyday life of a school: "the action on the stage has to equal the words on the page" (PrimP2). EdCon felt that, "there's no point" in writing something down if it isn't being lived out, with ChEd1 agreeing that the role of an organisation is to make the ethos, "part of your life." This was echoed in some of the 37 comments by the respondents (q10), wherein they suggested that the public articulation of their ethos was also through staff behaviour, Open Days, staff-pupil relationships, school assemblies, programmes of activities, staff meetings, interactions with parents and the community: "we live out our ethos everyday [sic] in school – that is more important than words on a page" (68878646).

Ethos, "has to be lived" within the very fabric of a school (SEO1), becoming a part of it, a way of life which, "takes on a life of its own" (PrimP2). Although unseen and difficult to measure unless it is lived

and felt, ethos must be carried through by everyone associated with the school in order for it to be, "actively alive and well" (PrimP2).

Who influences it?

The participants were in no doubt that leadership is vital for ethos. EdCon, GramP and ChEd1 suggested that the main determinants of ethos in a school are the principal, senior leadership team and the Board of Governors, with ChEd1, ChEd2, SecP, PrimP4 and GramP believing that the principal is the key driver. Although there is an acknowledgement that the Governors are, to an extent, "guided by the principal" (SecP), there must be symbiosis between the two. This is vital for the shared vision for the school, as is the subscribing to that ethos by staff and pupils, a point echoed by the 59.12% (n=81) who believe that staff 'definitely' share their school's ethos (q7) and the 76.47% (n=104) who 'definitely' expect them to (q8), with the only significant difference being the Integrated principals, 50% of whom 'definitely' expected them to, whilst 40% 'largely' did. Both SEO1 and ChEd1 talk of the importance of discussion between stakeholders and policy-makers in relation to ethos, whilst SecP, PrimP3, PrimP4 and SpP discussed the, "collegiate, collaborative" (PrimP3) manner in which they have approached ethos with their staff, with SpP also stressing the importance of pupil voice in the process.

After considering the 'what', 'why', 'how' and 'who' of ethos in general, the research turned to the 'where'*,* to look at these more specifically within the context of the CS. Before presenting the views of the respondents and participants on the ethos of the sector, it is necessary to consider their thoughts on the sector itself.

The Controlled Sector

Complexity

> …the Controlled Sector will always be unity and diversity, will never be uniformity… there's unity in diversity (ChEd1).

As the largest sector in NI, the Controlled Sector is broad, mixed, diverse; "a wide collective of institutions, of schools, of individuals, of communities" (Pol1). It is, "much more complex" than the two views that it is either Protestant or secular (SEO2), embracing different denominations, "different faith backgrounds or non-faith backgrounds" (Pol2) and those from other countries. The sector is also comprised of Controlled Integrated primary and secondary schools and Controlled Irish Medium schools, those schools which were not historically transferred (with all nursery and special schools falling into that category) and new secondary modern schools, which, whilst not transferred, "were formed with Transferor Representatives and assumed that mantle, that culture, or that ethos almost immediately" (TUO).

These newer additions, depending on one's position, were either "seen" (Pol2) or were, "in the real sense" (TUO) 'State' schools and it this tension which, according to Pol2 has evolved through a lack of clear ethos-articulation and has led to the sector becoming, "all things to all people" (Pol2).

Protestant?

Despite the understanding that the sector is open to, "all faiths and none" (ChEd1; PrimP1; PrimP2; PrimP4; SEO1), the binary view of its being either Protestant or secular clearly exists. Although the statistics presented during interview (particularly that of 66% Protestants attending Controlled schools) was surprisingly low to TUO, he and ChEd1 both stated quite clearly that, it is, "not a Protestant sector," a point perhaps disputed by the indecisiveness of the mean answer of 2.85 for q13 (*Would you describe your school as Protestant in character?*) and 2.63 for q14 (*Do you think that the parents/ guardians/ carers who send their children to your school consider it to be Protestant in character?*) with 1=Definitely and 5=No. Unsurprisingly, the Nursery phase which traditionally recruits across the sectarian divide, gave a definite 'no' (54.55% (n=6)) to q13 and this was also the most popular response (40% (n=4)) from the Integrated phase. What was a little more surprising was that, although, as expected, the 81.81% (n=9) Nursery principals considered that 4 (Not really) or 5 (No) described whether parents felt their schools to be Protestant, 50% (n=5) Integrated principals chose 2 (Largely) and 3 (Somewhat).

TUO, SEO1, ChEd1 and Pol2 discussed the growing numbers from a traditionally Catholic background, with PrimP1 applauding the growing integrated nature of its schools, although the most popular selection for q17, replicated across all phases (*To what extent would you describe your school as 'mixed' within a Roman Catholic/Protestant tradition?*) was a 6 (36.5% (n=50)) with 1=Completely and 7=Not at all, and the mean for q18 (*Do you think that the parents/ guardians/ carers who send their children to your school consider it to be 'mixed' within a Roman Catholic/Protestant tradition?*) was 3.32 with 1=Definitely and 5=No, with no substantive deviation across the phases. SecP questioned whether the sector actually wishes itself to be seen as Protestant, especially as that label can be more to do with, "community background rather than religious allegiance" (Pol2).

So is it secular? 58.1% (n=79) respondents selected 6 or 7 with 1=Completely and 7=Not at all for q21 (*To what extent would you describe your school as secular?*). Although 7 was the second most popular answer for the Post-primary phase, there was some equivocation in that the highest response was a 4 (35.3% 9n=3)). Whilst Nursey opted mainly to equally distribute between 5 and 6 (60% (n=6)), it was interesting to note that two respondents selected 1 (20%) and one (10%) chose 2. In the Grammar phase, there was a marked difference of opinion, with 40% (n=2) choosing 1 and 2, whilst 40% chose 7, with the remaining one respondent opted for 5. Such a difference of opinion makes it difficult to make an informed judgement about general views of the phase.

For q22 (*Do you think that the parents/ guardians/ carers who send their children to your school consider it to be secular?*) the mean was 3.88 with 1=Definitely and 5=Not at all. Interestingly, given the answers for the preceding question, this was reflected in the Grammar phase, although in keeping with the above, the Post-primary and Nursery sectors had a more equivocal 3.57 and 3.55 mean. PrimP1, SEO1 and ChEd1 stated categorically that it isn't, although Pol2 cautioned that, until such times as the sector takes a clear position, it will be unable to, "take away any confusion that somehow State education is secular."

Autonomy

One of the factors, participants believed, which exacerbates this confusion is the autonomous democracy which is devolved down to Controlled schools. This has its benefits, but the, "looseness" (TUO) ensures that, "every school is changing at a different rate" (SecP) and that some can, "tend to

go off on a tangent and float about" (NurP) in a vacuum. Schools can therefore feel isolated and can feel that it gives educational authorities the excuse to abnegate responsibility to schools and their Governors, "whenever a school runs into difficulty" or over matters of ethos. This makes the job of finding good governors a significant task, and leads to an inevitable struggle in finding people for whom the job is, "treated as anything other than a chore" (SEO2), and in getting the, "right people" (SEO2), especially with regards to Transferors, whom schools often, "find it difficult not to appoint" (TUO) to senior positions such as Chair, without them necessarily having the right skills.

This autonomy has ensured that the Controlled Sector is, "the least controlled of any sector; the word is a contradiction" (ChEd1), with his opinion being that the others are much more controlled. So how do the participants believe the Controlled Sector compares with these others sectors?

Comparison

Despite what the two main sectors share in common in values and church involvement, a palpable envy was evident over disparity of funding with the IS, which is, "at the top of the political agenda" (PrimP3), in how it and the Maintained Sector are, "favouring children from within their sector" in transfer to post-primary schooling (PrimP1), in the ability of the Maintained Sector to be, "overt" (PrimP4) in matters of faith and in how the Maintained Sector will quickly fall into line with decisions, such as school amalgamations, because, "they can see the mutual benefit for all. Do that in the Controlled Sector and we are all going to fight each other" (PrimP4).

Leadership

This final point was elaborated upon by SEO2 and TUO, who bemoaned the lack of strong, collegiate leadership for the Controlled Sector which was apparent in the Maintained Sector. In acknowledging that a school's success was dependant on its leadership and that CCMS had cut a swathe through under-performing Maintained Sector principals to get, "the right leaders in the right places to deliver the right results", TUO talked of how, "poor performance has been picked up less" in the Controlled Sector. The lack of performance-management and management ethos has ensured that, "schools have been left alone to a degree that wasn't helpful… [and] that expectations and aspirations weren't as focussed or as high as they could have been" (TUO).

Whereas, formerly, principals might have been appointed because of their denomination, or how active they were in church or in the local sporting club, the world has changed. Although there might be a residue of this left, especially in choosing leaders who promote the values of the Governors, appointments are, "moderated by legislation" (ChEd2) to ensure that principals are able to fulfil the wide range of duties expected of them. The job has become, "amazingly stressful" (PrimP2), with "a bewildering amount of information" (TUO) and an overload of policies and initiatives to master.

Support

This feeling of being, "stretched beyond capacity" is putting the entire sector under strain (NurP) and is exacerbated by the belief that, whilst the ELBs provided practical support to Controlled schools, they could not be, "cheerleaders" for the sector (ChEd1), having to remain, "neutral" (ChEd2) because they had to represent all schools within their geographical area. Whilst, on the surface this seems equitable, the Maintained and Integrated sectors also had their own advocacy bodies, whereas Controlled schools only had the ELBs to lean on. In particular, the, "highly developed structure" of CCMS (PrimP3)

and its, "direct involvement with schools" (Pol1) ensured a greater level of support and commonality within the Maintained Sector.

This commonality is seen as a great strength within the Maintained Sector and reflects the importance of the Catholic culture (which TUO suggests is one of *participative* democracy rather than the Protestant *representative* democracy) and of the influence of the GAA in local Catholic communities. Whilst Controlled schools reflect their own individual communities and these communities are culturally, if not religiously, Protestant, participants weren't sure whether the Controlled Sector had the same, "package" as the Maintained Sector that parents could buy into (SEO2). Controlled schools have always been a looser association of schools, with the only thing bringing them together as a collective being, "governance arrangements that are set down in law" (SEO2).

SEO2 suggests that the Controlled schools makes more sense, "as individual entities" and there is no doubt among participants that each school is individual, resulting in each having its own ethos that is unique to them. Whilst NurP and PrimP2 agree with DE that every school is and should be responsible for their own ethos and whilst there are differences between each, SpP, PrimP2 and PrimP4 speak of the similarities and commonalities which exist between these ethoi. Different or similar, what is evident is that this range of ethoi has, "diluted" (PrimP4) and, "fragmented" (PrimP1) any sector-wide ethos with the CS.

The ethos of the Controlled Sector

Contestation

> To say there is no ethos in the Controlled Sector basically says there is no such thing as a Controlled Sector: it is just a gathering together of independent schools (ChEd1).

Whilst Pol1 suggests that the very fact that there is a Controlled Sector suggests that an ethos exists, Pol2 and Primp3 suggest that it perhaps is yet to be identified or agreed upon. Respondents were generally unsure (with a mean of 2.7 (1=Definitely; 5=Not at all) for q32: *Does the Controlled Sector have an ethos?*) about this, with the most popular answer across most of the phases taking the middle ground of 'somewhat', although the non-integrated Primary principals mostly chose 'largely' (34.09% (n=30) and 40% (n=2) Nursery principals opting for 'Definitely'. Given that the Primary phase is the largest in the Controlled Sector, it could be construed that the larger community of schools which this phase constitutes might give more of a feeling of unity, which they might perceive as 'ethos'. With the smaller numbers of Nursery respondents, however, it is difficult to make a phase-wide generality from the above. The idea of an ethos of the Controlled Sector has been, "hotly debated... at length" (Pol1), is contested, and it has, "infuriated" the Protestant Churches (ChEd2) when DE have either said one does not exist, or that it is up to each school (SecP). The hands-off approach to ethos by EA, ELBs and DE has therefore led, "to mulch, to confusion" (TUO).

What is the ethos of the CS?

In considering the 'what' of the Controlled Sector ethos, SEO2, TUO, SecP don't believe that there is an, "overarching" one (SecP) that unifies the sector, but rather a fragmented one for a fragmented

sector (PrimP1; PrimP4). Although there was one originally (ChEd1), it has been "weakened" (ChEd1), "tarnished… concealed" (Pol2), "frayed" (TUO), "diluted… pushed to the fringes" (SecP), "watered down" (PrimP1), "lost… in the mists of time" (GramP), or, "incredibly non-existent in certain areas" (PrimP1).

However, EdCon, PrimP3 and SpP state categorically that such an ethos exists, with ChEd1 and ChEd2 agreeing that a collective ethos is in evidence. PrimP4 believed that, fragmented as it is, one is there, and GramP also qualified his views to say that there is an ethos, albeit one that is not as clearly articulated as the Maintained Sector.

Notwithstanding SpP's view that the sector reflects NI's insularity, she also spoke with pride at the growing *inclusivity* of the sector's ethos, a point echoed by PrimP2, PrimP3 and PrimP4. Inclusivity and inclusion forms a vital part of ethos in Controlled schools, with 84.73% (n=111) respondents suggesting that their school's ethos refers to it (q11) and 'inclusive' being the top response (39.13% (n=54)) for the essence of the sector's ethos (q31) across all phases, although 28.57% (n=2) of the Grammar principals each gave their vote to 'inclusive', 'non-denominational' and 'integrated'. The sector is, "open" to everyone (SEO1; PrimP1), all encompassing, ready to accept and learn from those of all faiths, but still with a way to go with regards to integration.

So does this integration and inclusivity mean that the sector does not have a *Protestant* ethos? PrimP4 thinks so, suggesting that, "there is nothing Protestant at all" when one enters a Controlled school. SpP *assumes* that it is there, SecP *thinks* that is, and PrimP2 suggests that the ethos is, "very linked with traditional Christian values within the Protestant community." SecP and SpP also mention this link with the Protestant community and both then qualify this by linking the word 'Protestant' with 'Christian' in the context of community and of faith.

It is the concept of *Christian* faith that the participants believe most clearly defines any ethos within the sector, with 76.81% (n=106) respondents believing their schools to be definitely or largely Christian (q15), apart from the Nursery principals 45.45% (n=5) of whom selected 'somewhat' before the 36.36% (n=4) who chose 'largely' as the phase's top answers. For the majority of respondents, the word from the list in q12 (*In any public articulation of your school's ethos, do you use any of the following words?*) that was used most often in the public articulation of their school's ethos was 'Christian' (44.44% (n=60)), although the Grammar principals put 'non-denominational' and 'moral' before 'Christian' and the majority of Nursery and Special principals suggested that none of the words were used. Echoing the CSSC Vision Statement, EdCon, ChEd2 and TUO suggest that the sector has a non-denominational Christian environment, whilst SpP, PrimP2, ChEd1, ChEd2, Pol2, GramP, PrimP4 and TUO explicitly state that the ethos of the sector is Christian, with the latter 6 using the term, "Christian ethos". This Christian ethos is, "warm, open" (ChEd1) and, "solid" (PrimP4), it is, "core to the work of the school" (ChEd2), it should, "permeate every avenue of our school" (NurP) and it is firmly, "rooted" (ChEd2) in the core principles and, "values" (ChEd2; Pol2; TUO; PrimP2; PrimP4) of Christianity.

The manifestation of this Christian ethos in the Controlled Sector is demonstrated through the celebration of the Christian calendar, through, "a whole plethora of expressions of that Christian faith" (ChEd2), whether that be through the messages at assembly, community outreach, after-schools or breakfast clubs for disadvantaged children, Scripture Union (SU), or fund-raising and charitable work, through, "acts of Christian worship" (SEO2), RE and assemblies, and through strong links with the local churches. These elements will be looked at in more depth later, but it is useful to include here the fact

that SEO2, Pol2 and ChEd1 also alluded to the legal basis for a Christian environment through the specific legislation around the delivery of, "non-denominational Christian" RE and collective worship (ChEd1).

Whilst TUO might believe that such a Christian ethos is, "residual" and NurP worries that it is too often watered down and paid, "lip service", it is, "important" to the Controlled Sector (GramP; PrimP3) and, although it, "may be subtle… it is real" (ChEd2). This, "historical" (PrimP3) Christian ethos is still, "part and parcel" of the operation of Controlled schools (SEO1), even those which were not historically transferred, and is something which is wanted and needed and should be protected.

It was acknowledged that the strength of this Christian ethos may vary across schools and across phases. There is greater cross pollination between religions in the nursery and special phases, there is more of an academically-driven context within the secondary and grammar phases, whilst in, "almost every" (ChEd1), "most if not all" (Pol2), or "all" (PrimP3) primary schools, "it is reasonably straightforward" to see the Christian ethos (ChEd2).

Influence

Pol1 suggests that influence is about power and control and so the question of who 'controls' the ethos of the sector and who should was raised with the participants. Whilst EdCon believed that, historically, it was the churches, SEO1 and PrimP2 believe that it should be the schools who control the ethos of the sector and this should come from, "a shared view by all the members of staff and the governors" (SpP). At a more tangible level, participants believed that this control should come specifically from the Boards of Governors, although realistically it is principals who assume this control. Although GramP questions whether an outside body can be responsible for ethos, Pol2, SEO2, PrimP2 and PrimP4 talked of a partnership with CSSC in this regard.

As to who *does* 'control' the ethos of the Controlled Sector currently, opinions were divided and some reflected the top four (of 14) choices of the respondents (q33 on who has the most influence on ethos in the Controlled Sector):
1. Principals (33.33% (n=46))
2. EA (17.39% (n=24))
3. DE (14.49% (n=20))
4. Governors (13.77% (n=19))

(It is noteworthy that the Special principals did not include 'Principals' in their choices at all, opting for EA (40% (n=2) as their first choice, with DE, Governors and Stakeholders as the other three choices (with 20% (n=1) each). From this is might be construed that Special principals feel they have no influence over the sector, an understandable point, given that, although 95% of Special schools are legally Controlled schools, until the CSSC recently made this public, few people were aware of it.)

PrimP1 felt that it is DE and EA; PrimP4 that it is every individual in a school; PrimP2 that it is schools; and GramP and SpP referred to the community. Whilst PrimP4 referred to principals *driving* the ethos, EdCon, ChEd1, ChEd2, and SecP believed that it is principals who control it, and SEO1, ChEd2 and TUO spoke of the key influence that is held in controlling the ethos by the churches.

The Protestant Churches

Historical

In this society, education and churches have been intertwined for centuries (Pol1).

Pol1 is, "a firm believer in the separation of church and state" and SpP that, "the churches really should be taken out of the equation." ChEd1 and ChEd2 disagree, with the former adopting a, "conspiracy outlook" which suspects DE of wanting to secularise and, "suck out the religion" from Controlled schools, and the latter castigating, "the nonsense talked by people who want to remove the Church and Christianity from any influence in schools." Although Controlled schools are no longer administered by the churches, PrimP3, PrimP4, SEO1, SEO2, ChEd1, ChEd2, EdCon, TUO, Pol1 and Pol2 all spoke at length about the history of the Churches' role in the Controlled Sector since Partition.

They also understood that, "the basic deal was... we will transfer these schools, we want to maintain a level of interest" (SEO2). The transfer was a legal, *quid pro quo* arrangement in turn for representation and to ensure the, continuing retention, protection, celebration and impact of Controlled schools' Christian ethos. Respondents were somewhat ambivalent on whether they were 'church-related' with the mean for q60 (*Would you describe your school as 'church-related'? (1=Definitely; 5=Not at all)*) being 2.62. Whilst the Primary principals opted as their majority selection 'Definitely (36.78% (n=32)), the Post-primary respondents selected 'Largely' (41.18% (n=7)), the Integrated principals chose 'somewhat' (70% (n=7)), and the Grammar and Nursery went for 'No' (42.86% (n=3); 72.73% (n=8)), with Special principals being split at 40% (n=2) each opting for the extremes of 'Definitely' and 'No'.

For q61 the mean of 2.46 reflected this ambivalence (*Which best describes your school's link to the local Protestant churches? (1=Very close; 5=Non-existent)*), with the Primary suggesting that the phrase which most described their link being 'very close' (36.78% (n=32)), the Integrated split between 'close' and 'quite close' (20% (n=4) each), the Post-Primary opting for 'close' (52.94% (n=9)), Grammar 'quite close' (57.14 (n=4)), and the most popular choices for both Nursery and Special being 'non-existent' (63.64% (n=7) and 40% (n=2) respectively).

All of the participants except GramP and NurP spoke knowledgeably of the work of the churches through boards of governors. This was seen as an opportunity to become involved and to look out for the interests of their parishioners, through their legal rights of representation. Very often (but not always) the church rep's are the local ministers, many of whom are elected as chair of the board, often out of, "deference" (TUO) to the church's role and the minister's status within the community, but the Christian influence is also seen through the, "strong" (PrimP2) and, "active" (PrimP1) church connections of many other governors, thus ensuring a, "significant" Christian influence (SEO2; ChEd2; PrimP3).

Despite this, the TRC is a body of which most of the general public have never heard and most schools (72.79% (n=99)) have had no interaction with (q67), a trend noted across all phases. Whilst ChEd1 suggested that TRC is, "a significant voice" within the CS, and Pol1 was able to identify its governance, appointments and advocacy roles, and SEO1 acknowledged its role in the setting up of CSSC, all of the principals associated it with simply the provision of governors, and GramP - despite prefixing a comment with, "it would be glib to say" - suggested that its role was to pray for the sector. Members of TRC are volunteers without, "the time, resources or the ability" (EdCon) to either be the ear or the

voice of the sector, especially in the face of strong lobbies from other sectoral bodies which were given greater credence than TRC.

The, "influence over policies, over procedures, over the running of the school" (PrimP3) ensures that the churches have, "a form of control" (SpP). They have tried to instil in their governors that their contribution is different from the rest of a board (especially given concerns expressed that Transferor governors were not always equipped to understand their specific church-representation rather than general governance role) and that they bring a, "very unique insight" to the strategic direction of a school (PrimP2). Their positions on the boards, their rights to carefully select their rep's and the representation of a value system is something which PrimP4 argues brings a power to the churches which they need to understand, believe in and invest in.

Investment

This investment was investigated and influence over the ethos was identified primarily through the churches' work in assemblies/collective worship and RE. Assemblies are seen as a key - although for some the only manifestation of the - link between the church and the school, a point reinforced by its being the most popular answer (44.44% (n=56)) in q63 on which area of schools' lives are the local churches most involved (Governance; Collective Worship; RE; Pastoral). The Primary and Integrated principals put Collective Worship slightly ahead of Governance and these two firmly ahead of the others, whilst, for the Post-primary phase Governance received 58.82% (n=10) as opposed to Collective Worship's 23.53% (n=4) selection. The Grammar phase opted for RE as its top choice (40% (n=2)), whilst Nursery and Special chose Pastoral (both with 50% (n=2)).

The delivery of RE is through the Core Curriculum designed and agreed between the four main churches: "it was quite remarkable it was agreed; quite an ecumenical achievement" (ChEd2). ChEd1 and Pol2 pointed to legislation under which RE should be, "based on the Holy Scriptures" (ChEd1), but he was quick to point out that it was neither religious instruction, nor religious formation and ChEd2 echoed this, defining it as, "a Biblical approach to Religious Education." PrimP2, PrimP3 and SecP view this as espousing a Protestant Christian faith, albeit a non-denominational one. Churches also have the right to, "deliver" (ChEd2), assess and inspect RE, although this is something which is no longer common-place.

RE can be viewed as, "the most boring class" (ChEd1) and has suffered from a lack of status, support, resources and creative teaching; a confusion over the difference between instruction and education; a Biblically- and faith-illiterate generation of pupils; and a Core Curriculum which is narrow and limited and doesn't really address emerging social issues. One of the major concerns with it is in relation to the teaching of other faiths and participants voiced the need for these to be, "explored" (SpP). There were caveats to this, however, as Pol2 felt that this was not about, "setting your ethos on a parallel with others" and that you needed to be, "persuaded in your own mind" about your own beliefs before exploring those of others. SecP also viewed any such study as secondary to the studying of, "the Protestant faith" and PrimP2, whilst being happy to, "engage" with other faiths, would be uncomfortable if asked to, "promote" them, a point echoed by NurP and PrimP4. ChEd1 and GramP were comfortable that the Core Curriculum should consider further how to, "educate with regard to other faiths" (GramP) and TUO looked at it as, "an opportunity to enrich the whole body of the school."

SEO2 believes that the churches are, "the guardians of the value system" within the CS; not only do they represent this system, but they are a steadying influence and, "moral compass" (PrimP4; NurP),

steering people through society; the, "salt and light" (ChEd2) to pupils, teachers and parents, demonstrating, "integrity, honesty, tolerance, understanding, compassion" (EdCon).

Influence

Throughout the research, there was constant comparison with the Maintained Sector and this was apparent in considering the role of the churches. SEO2 spoke of the influence of the Catholic Trustees, who are, "much more powerful" (ChEd2). Although Pol1 suggests that this influence is waning, respondents clearly didn't think so, with the mean answer for q69 (*To what extent do you think the Roman Catholic church has influence over education in NI?*) being 1.85 as opposed to 4.54 for q70 (*To what extent do you think the Protestant churches have influence over education in NI?*) and 4.35 for q72 (*To what extent do you think the Protestant churches have influence over the CS?*), with 1=High degree and 7=none in each question, and, although the only statistical anomaly was the Post-primary phase, with a mean of 3.88 and 3.76 for qq70 and 72, this represented a reasonably even spread across the choices from its 17 respondents. Acknowledging that the past influence was, "unduly strong" (ChEd2), Pol1, GramP and SpP suggest that the churches should have less influence. However, NurP and PrimP4 believes that they do not have enough influence, and PrimP2, PrimP3, SecP, Pol2 and SEO1 suggest the balance is right, with the respondents opting for a middle course (mean = 3.99) for q71 (*To what extent do you believe the churches (RC and Protestant) should have influence over education in NI?*) and a mean of 4.01 for q73 (*To what extent do you think the Protestant churches should have influence over the CS?*), with 1=High degree and 7=None. For these two questions, it is noteworthy that the Primary, Integrated and Post-primary principals (who account for 83.33% of the respondents) made choices which resulted in their collective mean staying below 3.75, whereas the Nursery, Special and especially the Grammar principals were much less keen to see the churches' influence within education, with means close to and, at times, above 5, and the most popular answer for each question from each phase being 'No influence'.

Participants suggested that the influence of the churches depends on geography, with a stronger influence in rural areas, and also on the individual minister, congregation, church member or denomination as well as the individual school itself. This was apparent in the answers for q62 (*Which word best describes your relationship with the local Protestant churches?)*, with the overall mean being 3.37 (1=Non-existent; 5=Partnership) and the most popular answers 'useful' (32.35% (n=44)), 'close' (29.41% (n=40)) and 'partnership' (17.65% (n=24)). Whilst these were broadly reflected in the primary phase (with 'close' nudging ahead of 'useful' by 2.33% (n=2), although 60% (n=6) of Integrated principals selected 'useful'), and in the post-primary phase (although 'partnership' only received 11.76% (n=2) of the share), in the Grammar phase only 'formal' (57.14% (n=4)) and 'useful' (42.86% (n=3)) were selected, in the Nursery phase 7 people (63.64%) opted for 'non-existent', 2 (18.18%) for 'useful' and 1 (9.09%) for 'formal', and in the Special phase the results were 40% (n=2) each for 'non-existent' and 'close' with 'useful' receiving the final 20% (n=1).

There was a recognition that churches have, "greater influence than in other parts of the UK" (EdCon), but a concern that the churches have become, "too comfortable" (ChEd1) and, "lazy" (PrimP4). Just sitting on committees and boards is not enough, especially as their nominees, "have not always been representing their church interests" (PrimP1). The church enjoys less influence and needs to, "use it or lose it" (ChEd1), becoming less focussed on what happens in their own buildings: "the people are not coming to church; the church has to go to the people" (SEO2); "they have to get out there in society" (PrimP4).

Involvement

> "Churches are a big part of this society whether we like it or not" (ChEd1)

There was an understanding of the churches' historic role in "educating out of poverty" (Pol1) and providing the, "social cohesion… the social glue" (TUO) especially during NI's dark past. Involvement also benefits the church, through enabling the minister to meet with the local children, keep up to date with what is going on, maintain the link between church and school and understand cultural diversity, especially through cooperation with the other denominations and the Catholic. The benefits were clearly felt at school level, however, with schools valuing the input at governor level and through the support mobilised and given. This support has manifested itself in encouragement, mentoring, suicide awareness training, pastoral work, running after-school clubs, praying and in relationships forged with the school community.

To do this though takes commitment, presence, friendship, availability, regularity and time, especially in the face of growing, "points of contention in the future" (ChEd2). The importance of the continuing link will be especially relevant for the churches given the prevalence of independent denominations, other faiths and secular groups, many of whom might wish to have an input into education.

Whilst there has been, "an assumption" (SEO1) that the Controlled Sector ethos is Christian, this changing face of society and of education has led to a reluctance, worry, or even, "fear" (PrimP4; ChEd1) to talk about a common ethos over the years, lest schools would be seen as, "in some way proselytising" (SEO1) and the fresh exploration of it was welcomed warmly by participants. There is a feeling that the fear-factor needs to, "be brought to an end" (Pol2) and that the time is here to be able to say, "this is what we stand for and this is what we are aiming for" (PrimP4), to begin to celebrate a single, coherent, unified Controlled Sector ethos (SEO1).

A single ethos

Desirable?

> …this is who we are and this is what we're about (Pol2).

Respondents were divided on the need for a single ethos, with the mean for q35 (*Do you think it is necessary to have a single ethos for the CS?*) being 2.91, with 1=Definitely and 5=No. Notwithstanding the lack of certainty of SEO2 and PrimP2, participants feel that the Controlled Sector needs, "one definition" (EdCon), "a single generalised ethos" (TUO), "a framework" (Pol2), "an overview" (PrimP1), "a set of guiding principles" (TUO). In order that the sector has a, "unified voice" (PrimP3), there should be, "the same ethos underpinning all the schools" (EdCon). Such a, "step forward" (EdCon) would be, "important" (GramP; SpP), "very positive" (SpP), "hugely desirable" (PrimP4) and, "absolutely essential" (PrimP3) in enhancing coherence and moving away from the, "dolly mixtures" (TUO) of 558 different interpretations of ethos. To highlight this, ChEd1 and TUO compared the explicit nature of the Maintained Sector, which is, "easy to see" (Pol2), clearly defined and articulated, "highly

developed" (PrimP3) and shared across its schools. The faith element is, "unapologetically unreserved" (Pol2) and, "totally acceptable" (PrimP4) to and promoted amongst its stakeholders.

Attributes?

Such an ethos needs to recognise that one size does not fit all and that it has to reflect the breadth of the sector and the differences between schools, giving room for them to retain their individual identities and to, "deliver it in their way" (EdCon). It should highlight the moral responsibility of schools to get the best outcomes for their pupils, it should strengthen the vision of the Controlled Sector for caring, sharing and integration and provide cohesion to staff, expectations and the sector as a whole, "rather than everyone paddling their own canoe" (PrimP1). Overall, respondents believed that the purpose of such an ethos would be, in order of importance, to articulate Controlled Sector values; to give a sense of collective purpose; to give a collective identity; and to provide a benchmark against which to judge compatibility of policy (q36). Whilst each phase put the benchmarking as their final choice, it was interesting to note the differing order of the other three: The Primary, Integrated and Post-primary phases reflected the overall order; Special too put Values first, but then chose Identity as more important than Purpose; Nursery put Values third, with Identity and Purpose topping their choices; whilst Grammar began with Purpose, followed by Values and then Identity.

A single ethos should therefore be a, "shared ethos" (ChEd1), which brings a sense of shared identity, of feeling part of something greater, of knowing and allowing stakeholders to know) that, "we are a Controlled school, under the umbrella of the Controlled Sector, this is what we stand for" (SecP). It should form an, "overarching" statement (SecP; PrimP2) which would be 'largely' welcomed by 38.69% (n=53) respondents, with the only phase variation being from Nursery, 54.55% (n=6) of which selected 'somewhat' (q37: *If a formal statement of ethos was articulated for the CS, would you welcome it?*), and which schools could adopt, subscribe to, or, "buy into" (SecP) as the ethos of the *sector*. 75.91% (n=104) respondents chose 'Yes' (from 'Yes', 'Not sure', 'No') when asked if they would contextualise for their own schools a formal statement of ethos for the Controlled Sector (q40), with principals from the Post-primary, Grammar and Special phases being even more emphatic (82.35% (n=14); 85.71% (n=6) and 100% (n=5) respectively). The participants agreed that, under this sectoral ethos, each school could then add to, elaborate upon, and express their ethos in their own way dependent on the identity of the *school*.

Logistics?

The logistics of a single ethos were considered by participants with EdCon acknowledging that the delivery of it may well vary according to area, catchment and leadership, SEO2 questioning its practicality due to how much more diverse in nature is the Controlled Sector than the Maintained Sector, and GramP and SecP speaking of how, "difficult" it would be. GramP, ChEd1 and PrimP1 bemoaned the fact that, unlike the other sectors, there was a lack of support for the Controlled Sector over ethos development, and ChEd1, ChEd2, GramP, PrimP1 and PrimP2 spoke of the need for time and direction in considering the concept, with both PrimP1 and GramP attesting to the need for an organisation to guide, support and mediate the process.

The Controlled Schools' Support Council

Context: DE and EA

While Controlled schools have no desire to be micro-managed they do need representation and there was a feeling that this support was not forthcoming from DE who have a, "political agenda" (PrimP3), using a narrative to, "suit the perspective from which they are coming" (ChEd2). ChEd1 and PrimP4 spoke about how DE has, "lots of ways of batting the ball back" to schools (PrimP4), PrimP3 bemoaned the amount of glossy booklets and Pol2 the amount of directives, "which just sends schools into a spin", whilst NurP summed up views of the participants: "everyone can talk a good story." ChEd1 and ChEd2 also suggested how aggravated they became over the DE position that the Controlled Sector is, "a sector with no values and no ethos" (ChEd1).

EA did not fare much better from the participants. Participants spoke of an organisation which has had its staffing complement reduced and appears unable to provide answers or effective support. Principals compared the mechanisms provided under the Education and Library Boards, especially the human face of having someone to talk to, which has now gone as the organisation has been, "stripped of so much capacity, so much experience" (TUO). The most passionate outbursts came from NurP and PrimP4 who, respectively, suggested that EA, "are expecting miracles… but they don't care how they get there" and that it, "is full of directives and… expectation and no support."

Context: inequity

It is this support which principals are, "craving" (PrimP4) and into this support-"chasm" (PrimP2) that the CSSC has stepped. At last (NurP), "the family of Controlled schools" (ChEd2) can pick up the phone and find that, through the collation and dissemination of good practice, problems can be approached, shared and solved, "in a common way" (ChEd2) through the network of Controlled schools throughout N. Ireland, a, "support mechanism" (PrimP4) which was already in evidence in the other sectors through their sectoral bodies. "The Controlled Sector had a valid argument of being felt that they were being left behind" (Pol1) in comparison to the Maintained, Integrated and Irish Medium sectors and there was, "quite definitely a deficit" (EdCon) with no one to be the, "voice" (ChEd1; NurP; Pol2; SecP) for the sector.

Provenance

EdCon proposes that the introduction of CSSC was, however, for more reasons than simply inequity, with Pol1 suggesting that it was a political compromise but SEO2 that it was a political necessity. There was a concerted effort, "by a small number of people" (Pol2), notably the TRC, to get the organisation up and running. It is seen by some as the exploitation of an opportunity by the churches to retain control or influence of Controlled schools, with a Board which could be deemed to be neither representative, nor diverse and rather disparagingly described as, "white, male and… stale" (Pol1), although EdCon disputes this, suggesting that it is led by, "various eminent educationalists." A fledgling organisation, with a lot to do to prove itself, it will take time for schools to see just, "how useful they can be" (PrimP4).

Necessity

In financially-constrained times some may consider CSSC, "another quango to take away money from schools" (PrimP3). However, "the necessity of the CSSC overrides that" (PrimP3), with 77.38% (n=106) respondents 'definitely' or 'largely' welcoming its introduction (q47), choices reflected across all sectors, and 12 of the participants clearly affirming its necessity: "yes" (EdCon; ChEd1; SecP; PrimP2); "very much so" (PrimP3); "definitely" (NurP); "absolutely" (SEO1; PrimP4). GramP welcomed the, "helpful step", which is seen as, "valuable" (PrimP2), "great" (PrimP4) and, "vital" (NurP). This enthusiasm is borne out in the numbers who quickly joined from a sector, "crying out" (EdCon) for the body.

Role

ChEd2 discussed CSSC's role in terms of area planning and the amelioration and implementation of policy, PrimP4 talked of its work on raising standards and SpP spoke with pleasure of Special schools now having a voice. ChEd2 also talked about showcasing and celebrating, "good stories about the CS", PrimP4 mentioned the, "support network" which will result in communications and events for Controlled Sector principals and staff to meet to discuss common issues and 7 of the participants mentioned how, "impressed" (TUO) they are with the staff of the organisation.

It is, however, in the area of *Representation* and *Advocacy* that the role of the CSSC is seen as most important, with the two topping the responses in the questionnaire (q46) above *Standards* and *Ethos Development*. Although 100% (n=5) of Special school respondents and 57.14% (n=4) Grammar principals selected *Advocacy* as the most important, the overall response (which was mirrored in the other phase-specific analyses) put *Representation* ahead, with the total being 55.47% (n=76) against 37.235 (n=51) for *Advocacy.*

> Having somebody who is an influencer on your behalf is really necessary because otherwise you're working in an environment where someone else's interpretation of policy could have huge impacts on your school, on the pupils in your school and on your staff (GramP).

Pol2 and SpP stated the importance of CSSC representing the sector, with ChEd1, Pol2, SecP, PrimP3 and SpP speaking of CSSC as its, "voice." SecP and ChEd1 both mentioned the media and the opportunity for this voice to be present alongside CCMS and NICIE, rather than the former practice of, "a random principal" (SecP) purporting to be speaking on behalf of the sector.

Ethos

Although only 3 respondents (2.19%) suggested that the *most* important role of CSSC is in ethos development, participants spoke about how, "one of its key pieces of work is to define" (Pol2) the Controlled Sector ethos and to make it, "relevant… [and] compelling" (GramP). According to ChEd1, it is part of its remit and it seems clear that this work, based upon a common and shared understanding was to begin through a clear and defined Vision Statement under which schools could rally.

The Vision Statement

"The CSSC supports Controlled schools in providing high-quality education for children and young people to enable them to learn, develop and grow together within the values of a non-denominational Christian environment."

Provenance

56.93% (n=78) respondents were previously aware of the Vision Statement (q48) and 45.99% (n=63) had had it formally articulated to them (q49), with 32.85% (n=45) not sure about this. Variations to the overall results included the Integrated and Special sectors being unaware of the statement (60% (n=6) and 80% (n=4)) and the Special phase being equally split at 40% (n=2) over recalling or not recalling it being formally articulated to them. Could it be argued that this lack of recall might be down to these three phases not previously having much of an affinity with the sector and, perhaps, not really engaging with the initial discussions over the CSSC? This uncertainty is reflected in participants' responses: Pol1 and PrimP4, "don't know" who the authors are and PrimP1 was, "not aware" of where the Vision Statement came from. Pol1, PrimP2 and ChEd1 believe that the authors were the CSSC Board, whilst PrimP1 assumed that it was from the churches, a point clarified by ChEd2 who spoke of TRC trying to, "find an ethos statement which encapsulated something of what *we* felt Controlled schools should be about" (my italics). Pol2 presumes that, "a paper was done" and NurP hoped that it was, "a collective statement" which included input from, "a lot of practitioners."

Despite NurP's hope of the Vision Statement coming from, "a democratic, accountable engagement with the sector" (Pol1) and SEO1's assurance that CSSC had, "had discussions with literally hundreds of people," there was a vagueness on the part of some participants: SecP, NurP, PrimP2, and SpP spoke of *assuming*, *presuming* and *supposing* that there was discussion and consultation; SpP remembers feeding into these, but SecP, PrimP1, PrimP2, PrimP4 and NurP cannot recall being consulted. It was ChEd1, ChEd2, SEO1 and Pol2 who all spoke of engagement with principals, governors, other faith groups and other interests and groups within the sector.

Attributes

The Vision Statement acknowledges, "the heritage" (GramP) of the Christian values which has historically shaped the sector and reflects the, "objectives" (SEO2), "residual influence" (TUO), "input" (PrimP1) and, "contribution" (ChEd2) of the TRC. This raises the question of whether the TRC footprint on the Vision Statement therefore means that the statement will be divisive and there was some concern from participants about the potential for this due to the more diverse population in Controlled schools, those of different or no faiths, beliefs, sexual preference, ethnicity, values, views, and those within the sector who may not subscribe to the Vision Statement and may be antagonised by it. However, 81.02% (n=111) respondents across all of the phases stated that they 'definitely' or largely' share the vision (q55), and 66.4% (n=91) and 63.2% (n=86) scored 1 and 2 for how personally (q56) and professionally (q57) comfortable they would be in articulating it (1=Completely; 7=Not at all). Pol1, ChEd1 and PrimP2 believed that the Vision Statement would be acceptable to both Protestants and Catholics, while ChEd1, EdCon and PrimP1 suggest that those of other faiths, "have a really strong value-base" (PrimP1) and support and value a faith-based ethos.

There were questions, however, over the term 'non-denominational', with SecP and PrimP4 questioning its use, GramP and NurP suggesting that it is confusing, and SecP, PrimP4 and SEO2 believing that the term 'Christian' on its own would have sufficed. However, given the traditional view that the Controlled Sector espouses a Protestant version of Christianity, there was a feeling that the

Vision Statement will ensure that these values will not be, "coloured" (ChEd2) by a, "dominant" (EdCon; PrimP2) church or denomination.

That said, there was some feeling that the Vision Statement, "maybe reads a little blandly" (ChEd2), is, "broad" (SEO1), "generalised" (TUO) and, "uncontentious" (TUO), although Pol1 cautioned that it could be, "open to interpretation for good and bad" (Pol1), especially around what and whose values are being espoused and the reasons behind them (GramP). It therefore needs, "expanded" (EdCon), "amplified" (ChEd2), "teased out" and unpicked, especially with regards to values.

Purpose

Despite these issues, participants acknowledged the Vision Statement as a useful framework or, "guiding force" (SpP) which affirms and coheres Controlled Sector practice, gives a refined understanding of the sector and through which all pupils can feel, "valued" (SEO1; NurP; GramP). It is about the celebration and sharing of what is good about the sector, both to its staff and to the wider public.

The Vision Statement also clarifies the ethos already in existence in the Controlled Sector, safe-guarding its position and focusing people's minds, elevating their thinking and stimulating debate around the, "ownership" (ChEd1) and verbalising of that which they have previously felt afraid to articulate. Given the tendency of Controlled schools to go off on a tangent, "paddling their own canoe" (PrimP4), participants felt that the Vision Statement unites the Controlled Sector, "behind one banner" (PrimP3), "describes who we are" (ChEd1) and prevents the sector, "from becoming disjointed" (PrimP4).

Policy Directive?

If the Vision Statement is to be the 'banner' behind which all Controlled schools will unite, will everyone have to march to the same beat and will schools feel that this is yet another policy directive? Although SEO2, PrimP3 and PrimP2 didn't think that it would and Pol1, Pol2, SecP, GramP and SpP gave a definite, "no", only 15.79% (n=21) respondents echoed this 'no' (q38: *If a formal statement of ethos was articulated for the CS, would you view this as a policy directive which you need to comply with?*) and only 6.57% (n=9) definitely stated they would not respond to it in the same way as other policy directives (q39), with the Integrated, Grammar and Special phases demonstrating that none of the respondents agree with those participants, in that none of them selected 'no' in qq38 and 39 from 'yes', 'not sure and 'no'. Pol1 suggested that schools will accept it or not if they want, although PrimP3 and PrimP4 believe that, if you sign up to the CSSC, you should accept the statement. Rather than a directive, PrimP4 sees the Vision Statement as, "a common core belief", GramP as, "a kind of guiding principle", SecP as, "an aid" which will be read, "with a different perspective because of who the messenger is" (Pol2).

Given that SEO2, ChEd1, ChEd2, SecP and PrimP1 contend that CSSC is not in a position to implement or enforce policies, there was a view therefore that, as it is far better for schools to embrace rather than have an ethos imposed upon them, any dictating or enforcing will be met with suspicion, resistance and resentment and that it is better to do it with schools, ensuring that they can, "buy into" (SecP) the vision.

This is especially relevant given the participants' views that many schools, "are already operating within" the environment of the Vision Statement (SEO1). SecP, EdCon, Pol2, SEO1, PrimP1, PrimP2, SpP and NurP echoed this, suggesting that for the schools they are most acquainted with, and indeed, "most schools" (SecP), "that's what they do anyway and they just get on with it" (Pol2).

Implementation

So will the Vision Statement make any difference? SEO2, EdCon, Pol2 and SpP believe that it won't make a clear difference to the sector, whilst ChEd1 and GramP think that it would and the largest response to q59 from 55.15% (n=75) was that its impact on the sector would be '2: mainly positive' (1=Positive; 5=Negative), however, the proof will be in what schools do with it (PrimP2).

Schools, "will undoubtedly perceive and adapt it in their own way" (TUO), as it is, "easier to articulate at school level" (SEO2). SpP opined that schools will view it as a positive (indeed, the largest response to q51 on school impact was again 'mainly positive' (46.72% (n=64)), apart from the Grammar and Nursery phases, which chose the middle ground of 'none' as their most popular answers (57.14% (n=4) and 60% (n=3) respectively), with PrimP4 suggesting that it will take away uncertainty as to what a school can stand for. SEO2, ChEd2, Pol2, SecP, PrimP2, SpP and NurP could not see the implementation of the Vision Statement as being divisive, although GramP and PrimP3 suggest that it will depend somewhat on the interpretation of it by governors. So long as it is managed well and the expectations and context of being a Controlled school are, "clearly articulated before anyone enters the school" then any potential division should be mitigated (PrimP1).

Participants believed that the Vision Statement should be a supplement that, "goes alongside" (ChEd1) a school's existing ethos, vision or mission statement, perhaps on the school letterhead or on a pop-up stand. It should act as a guide, which acknowledges schools' desire to express it, "in their own way" (ChEd2), giving them the flexibility to say, "This is the ethos of our sector and this is the ethos of our school" (PrimP2).

CSSC needs to be sensitive, thoughtful and persuasive about how they share, sell and promote the Vision Statement. It needs to be a, "conversation" with schools (Pol2), preferably face-to-face and certainly not through email, but perhaps exploiting social media and with some kind of follow-up support programme with principal groups. This sensitive conversation is especially important given the changing and different face of N. Ireland society which could be viewed as aggressively secular and has little time for Christian beliefs (TUO; GramP; Pol1).

Society's Vision?

Faith-based education

> "It is up to the schools to educate and to open minds, not to close them" (SpP).

Although SEO disputes the fact that we are now living in a, "post-Christian society," participants acknowledged that 2018 is a different world to that of a couple of generations ago, with fewer church-

goers in society and amongst parents and teachers. The world has, "changed fairly dramatically" (SEO2) and has become much more secular, with denominational adherence being for many a cultural rather than religious phenomenon.

Notwithstanding the acknowledgement of Christianity's impact upon society, the term 'Christian' in the Vision Statement divided participants. Although SecP would have preferred the term to 'non-denominational Christian', Pol1 felt that the Christian label made it, "restrictive". SEO2, EdCon and ChEd2 acknowledged that its use would be problematic for humanists, although TUO suggested that those who have, "humanist or atheist or agnostic views" are a, "very small minority" in N. Ireland. GramP and PrimP2 suggested that it was preferable to the word 'Protestant', especially as EdCon, SEO2 and PrimP4 questioned the very existence of a, "Protestant faith" given the variations within it compared to the clear and, "overt… deeply embedded" nature (PrimP4) of the Roman Catholic faith within the Maintained Sector.

This overt faith element to the Maintained Sector can be seen as, "there to ensure the continuation of the Catholic faith through education" (EdCon) and participants felt that such, "indoctrinating" (Pol1; ChEd2) and "indoctrination" (EdCon; ChEd1; Pol2; PrimP2) is something to be avoided in the Controlled Sector: "education for me is about the mind and body; the soul is for somebody else" (Pol1). Although this view was not shared by the majority of participants, EdCon and SecP understood that it is one which is held by some parents and PrimP1 questioned the role of the Controlled Sector in actively promoting a Christian environment. Pol1 did acknowledge, "the rights and entitlement for faith-based education" and the importance of faith for, "a significant group of people in NI" (GramP). Maintaining a link between faith and education is, "valuable" (GramP) and schools should celebrate faith to benefit society and enhance educational experiences through the inculcation of Christian values.

Parental Choice

The Vision Statement articulates these values to the sector and to those who will use it, clearly being, "upfront" (PrimP3) to parents about what a Controlled school is and effectively stating, "if you choose us you accept the rules" (NurP). Of course, many parents do not choose a school for their child based on religion and there is the option to, "opt out" (EdCon; ChEd1; TUO; PrimP2) of RE or religious observances. For some, however, the choice is explicitly made based on religion, whether that be because they support the Christian environment, they wish the children to be educated by Christian staff or, "to hear the same answers at school as they were hearing at home" (SEO2).

Despite PrimP4's opinion that society has become, "value-less, belief-less, hopeless, moral-less," ChEd1 and PrimP3 believe that Christian values still remain at the core of NI, and some participants felt that many parents chose Controlled schools because of these. ChEd1 spoke of a, "huge building of consensus between church-going parents and secular parents" who cherished those values, and who, "want their children to be brought up with a moral code, with a compass in their lives… framed within the Christian church" (ChEd2), a point borne out by respondents' opinion that parents 'largely' (44.53% (n=61)) consider their schools to be Christian (q16), with variation of this at phase level being that 41.18% (n=7) and 45.45 (n=5) of Post-primary and Nursery respondents felt that parents saw this 'somewhat' the case, whereas 40% (n=2) Special principals felt that it 'definitely' was.

Values

Education is driven by values and morals, and it exists to share, demonstrate, articulate and instil values, at the same time as challenging pupils to think and embrace values. The Christian values which participants believe are intrinsic to the Controlled Sector are integrity, caring, truthfulness, kindness, consideration, concern, compassion, obedience, responsibility, duty, fairness, tolerance, love, inclusion, honesty, equality and respect.

Of course, many who do not subscribe to a Christian faith will subscribe to similar values, many who have values do not derive them from a faith position, and it was the belief of participants that many of these people are entirely comfortable with the Christian values articulated above, especially when they are instilled rather than formally taught. Christian values are embraced by parents when they are lived out rather than reserved for the weekend and exhibited through 'walking-the-walk' rather than 'talking-the-talk' (SpP). Children too can, "pick up vibes very quickly" (EdCon) and need to see modelled by staff the values which are, "at the heart of Christian living" (PrimP2).

Ethos and values are, "interchangeable" (ChEd1); values shape ethos, ethos provides values and ethos is seen in the values: "a Christian ethos means… those values that the Christian faith brings" (Pol2). If the Controlled Sector can stand up and be confident of the message contained in the Vision Statement, if it can clearly enunciate these values, if the churches can honestly, "articulate that value system" (SEO2), then it is difficult to see how, "any right-thinking person can object" (EdCon) to the Controlled Sector ethos.

Policy and ethos

The study began by considering the relationship between ethos and policy, so it seems fitting that this is where it should conclude, especially in light of the view that the policy environment in N. Ireland is, "largely devoid of the value system" (SEO2), or, "counter-intuitive to some of the values that are articulated" (ChEd1). ChEd1 believes that values shape policy and that, "policy needs to be worked through respecting those values", with SEO2 going further to suggest that education policy, "should be developed in light of a Christian worldview."

The importance of policy is in its ability to create the environment in which practice can be achieved, through aims, objectives and targets giving direction and aspiration. When this works it is all well and good, but often policies have insufficient funding to be sustainable, they clash or don't join up, they are not cognisant of the people being asked to deliver them, they are reactive to, "social tremors" (TUO), there are too many of them and they discourage teachers.

Policy for the ideal?

In considering Ball's statement about policy being made for the ideal (*rather than accounting for the realities of individual school contexts* (q27)), the overall mean, reflective of each phase, was 2.96 (1='Ideal'; 7=Reality) and participants were in agreement, suggesting that policies come from a political, theoretical, financial, environmental, or aspirational ideal which makes them, "of no earthly

use" (PrimP4). Policy experts live in an ideal world, "very far removed from practice do-ers" (PrimP2), a point echoed by the overall mean of 3.21 which was reflective of each phase (1=Always; 5=Never) for q28 (*Do you believe current educational policy reflects the reality of your school context?*), albeit with the 'sometimes' of Primary, Integrated and Nursery, being a little softer than the 'rarely' of Post-primary, Grammar and Special, and the predominant choices of 6 and 7 (34.8% (n=48) and 33.3% (n=46)) for q24 (*To what degree do you consider that those who 'make' educational policy understand the realities of school life?*), with 1=Completely and 7=Not at all. PrimP2 spoke of a, "significant gap" between the two, and SEO2 of the, "interface" of the two, suggesting that he could not see, "a uniform connect" between policy and practice.

Effective policy

If policies are to be effective, "they should be worked up by those who know what they are doing in schools" rather than civil servants, officials and academics (ChEd1), who could then, "inform the experts of what it is like in the real world" (NurP). Policies should, "leave margin for reality" (PrimP2) being broad enough to allow for variation in order that there can be, "better alignment" (PrimP2) between paperwork and practice within the, "reality of schools" (PrimP4). Policies should be, "guidelines" (SpP) which are, "over-arching" (TUO) and give, "wriggle-room" (ChEd1), understanding that schools will take different views and interpretations as they, "get filtered through the thought processes of the people down below". Although the mean was 4.22 for how respondents felt they were *able to* contextualise policy (q29), the mean was 3.2 with regards to them actually doing this (q30), with 1=Completely; 7=Not at all, with principals in the Grammar, Nursery and Special phases feeling that they contextualise policy for the specifics of their schools.

Policy should respond to circumstances and complement the curricular needs of pupils, looking at, "the context in which it's going to operate" (SEO1). This is especially relevant taking into consideration respondents' views (qq25 & 26) reflected in each of the sectors that the most influential group over policy is DE (52.17% (n=72)), whereas the least is pupils (37.78% (n=51)). As well as considering the readiness of the school to adopt it and shape and contextualise it, policy should reflect the community that it is serving, considering the, "culture and the worldview and the dispositions" of those who will receive, "filter" and enact it (TUO).

Ethos/policy link

Policy also needs to, "take into account ethos" (SEO1) in the same way as it interpreted *through* ethos. PrimP2 suggests that, "ethos has its roots in policy" and that policy ends up being, "the written record of what underpins ethos," suggesting that the difference between the two is that ethos is active and policy passive until, "somebody takes it and does something with it." PrimP3 elaborates on the difference, considering ethos to be aspirational and policy to be, "more defined and procedural."

Pol1, Pol2, EdCon, TUO, GramP, SpP and PrimP4 believe that there is a link between ethos and policy, with SEO2 suggesting that it is, "clear cut" and SEO1 that they are, "inextricably linked." ChEd1 believes that, if ethos is based on values, then policy should be challenged on the basis of values and both ChEd2 and PrimP4 mentioned the specific example of the recent *Relationships and Sexuality Policy*, which stated that it should operate with cognisance of the ethos of individual schools. Ethos has an, "impact" (ChEd2) on policy as it, "influences" (GramP; PrimP3) how school leadership interpret and implement it and it is, "easier to formulate policy" when one accepts and recognises ethos (Pol2) and takes into account, "basic consent at the grass roots level" (TUO).

However, whilst PrimP4 suggests that no policy is written in his school that doesn't stem from its ethos, "one does not override the other" (SpP) and ethos can't justify, "not implementing the policy" (PrimP1). If a school's ethos is its foundation, "then policy would sit as an additional layer on top of that" (PrimP3); PrimP1 builds on the strata concept, suggesting however that, "policy is above ethos" although SecP believes that policy can't dictate ethos. Both PrimP1 and NurP believe that education policy in N. Ireland does not take account of ethos, TUO that ethos does not make a vast difference to policy, and SecP is concerned at an emerging, "conflict" between the two. Whilst PrimP1 opines that, in NI, "your ethos is irrelevant; the policy is there to be implemented," it is in this implementation that there is the flexibility, and GramP suggests that, if everyone in a school is firmly, "bought into an ethos… it won't really matter what the policy says; they will probably continue to operate in the same way."

This chapter has outlined the data accumulated in regard to the research topics. The next will consider what this means in the light of previous studies and how it adds to the body of knowledge on ethos and the Controlled education sector.

Discussion

This chapter will return to the Research Questions posed in the Introduction under the three headings of What, Who and Why. It will consider how the evidence helps to answer the questions surrounding the concept of ethos, the attributes and ethos of the Controlled Sector (CS), why a single ethos may or may not be important for the sector and the impact of CSSC's Vision Statement (VS) upon this. It will also address the questions surrounding who influences and leads the sector, whose values are most clearly expressed and how this impacts upon those who use Controlled schools. In concluding it will return to the lens through which the study has been viewed, considering what the research has found in relation to any link between ethos and policy.

The What

What is ethos?

It is difficult to find any academic work on ethos without it referring to the research of Donnelly or using her phrase that it is a, "fashionable but nebulous term" (2000, p134). In employing the term, "nebulous" which she and Solvason (2005, p87) had used, ChEd1 and ChEd2 encapsulated the general opinion of the participants on the concept's breadth which McLaughlin (2005) had found, the vagueness identified by Solvason (2005, p87), Hill (1991) and Green (2014) and the slipperiness suggested by McMahon (2001) and Graham (2012). In Pol2's contention that it is hard to put a label on, there was also an understanding that it is difficult to define (McLaughlin, 2005), or indeed, "highly resistant" to definition (Graham, 2012, p342) and that it is more an over-arching term (Callewaert, 2006).

The lack of definition (Graham, 2012) and lack of clarity around it (McLaughlin, 2005) is perhaps what led to the ten different interpretations by Pol1, SpP and PrimP4 (religious, spiritual, cultural, societal, educational, academic, political, historical, moral, belief), which echoes the thirty-six different interpretations outlined in the Literature Review where 'ethos' was preceded by, or 'ethos of' was followed by a descriptor word. SecP agrees with Solvason (2005) that ethos is about history, or, "inherited" (Luckmann, 1996, in Furlong, 2000, p61; Handy and Aiken, 1985, p87), and PrimP4's and Pol1's contention that ethos is about beliefs resonates with the views of Deal and Peterson (1999), Donnelly (2000), Furlong (2000), Handy and Aiken (1985), Hyland (2000), Munn et al (2001), Pike (2008), Smith (2003) and Solvason (2005).

Whilst SEO1 suggested that ethos is implicit (Prosser, 1999), and TUO that you know it when you see it (Prosser, 1999), participants concurred with theorists in suggesting that it permeates everything (Deal and Peterson, 1999) to the extent that it denotes who we are and how we do things (Deal and Kennedy, 1983). Nonetheless, participants agreed with Handy (1981), Grehan (2000) and Solvason (2005) that ethos can be a tangible experience, which, although often unsaid (Deal and Peterson, 1999; Solvason, 2005, Ebbutt, 2002), forms a, "framework" (Coolahan, 2000, p120) or, "foundation" (McGuinness, 2000, p243) upon which all of school life is built (McGuinness, 2000; Prosser, 1999; Hyland, 2000).

According to the participants, the job of ethos is to be a frame of reference (Coolahan, 2000), a set of values (Furlong, 2000; Handy and Aiken, 1985; Solvason, 2005), guiding principles (Boldt, 2000; Coolahan, 2000; Glover and Coleman, 2005, Smith, 2003) or beliefs (Solvason, 2005; Handy and Aiken,

1985) which binds a school together (Furlong, 2000). Ethos defines *who you are* (De Wolff, 2000, Bakker and ter Avest, 2005, Lambkin, 2000; Graham, 2012), *what you stand for* (Donnelly, 2000), *where you are going* (Barr, 2000), and *how you expect to get there* (Deal and Peterson, 1999).

Although there was a suggestion that ethos is about character (Brahnam, 2008; DfEE, 2001; Graham, 2012; Halloran, 1982; Smith, 2004; Williams, 2000), it is not about the individual but about the collective (Halloran, 1982; Hatton, 2013; Lambkin, 2000; Ogbonna, 1993; Williams, 2000). The overwhelming view was that it is about **sharing**, whether that be a shared identity (DENI, 2006), shared sense of meaning (Angus, 1998), shared vision (Barr, 2000), shared understanding (Angus, 1998), shared values (Angus, 1998; Furlong, 2000), shared responsibility (Hatton, 2013), or shared ownership (Williams, 2000), resulting from a shared discussion (Coolahan, 2000; Rowe; 2000).

Whilst there was a clear view that leadership is vital for ethos (Smith, 1995; Green, 2014), there was also an understanding that leaders are participants and co-learners in, and creatures and creators of ethos (Smith, 2003) and that, through an atmosphere of trust (Rowe, 2000) partnership must exist in the shared endeavour of ethos. SEO1 described this in the phrase, "symbiosis" which needs to exist between principals and governors (Smith, 1995), staff (Bakker and ter Avest, 2005; Coolahan, 2000; Donnelly, 2004; Green, 2014; McLaughlin, 2005; Mulcahy, 2000; Rowe, 2000), pupils (Graham, 2012; Green, 2014; Pike, 2008) and parents (Charles and McHugh, 2000; Coolahan, 2000; Donnelly, 2000; Glover and Coleman, 2005; Lambkin, 2000; Rowe, 2000; Smith, 1995).

EdCon, ChEd1, PrimP3, SpP and NurP agree with Canavan and Monahan (2000), Charles and McHugh (2000), Dellar (1998), Donnelly (2004) Green (2009), McGuinness (2000), Moos (1979), Smith (1995), Smith (1998) and Solvason (2005) that is these relationships which are at the heart of ethos, and without which it cannot develop.

Participants agreed that ethos is the welcome mat (Smith, 1995) for those who enter the life of the school, the assurance that, inside, people will be *valued* (McGuinness, 2000), *accepted* (Glover and Coleman, 2005; Hughes, 2011), *respected* (Hughes, 2011; Mulcahy, 2000; Pring, 2000; Williams, 2000), *encouraged* (Barr, 2000; Graham, 2012), *included* (Donnelly, 2000 and 2004; Hatton, 2013), *understood* (Mulcahy, 2000), *challenged* (Barr, 2000; Donnelly, 2000; Graham, 2012), *successful* (Hopkins, 1994; Furlong, 2000; Glover and Coleman, 2005) and *cared for* (McGuinness, 2000).

Ethos cannot exist in isolation from context (Allder, 1993; Ball, 1990; Braun, Ball and Maguire, 2012; Clark, 2000; Fairclough, 1992; McLaughlin, 2005) and must take into account the local communities which are being served (Pike, 2008; Smith, 1995; Smith, 2003), understanding, as did Halloran (1982), that the ethos of the school can be shaped by that of the community, whilst at the same time shaping that of the community. Schools need to be careful to reflect upon this, demonstrating the flexibility suggested by Pol2 and PrimP2, echoing Ball (1993), Charles and McHugh (2000) and Pring (2000), to serve the differing needs of differing communities and being careful to align their values to each (Donnelly, 2004; Glover and Coleman, 2005).

Ethos is primarily about values. In the same kind of cyclical process as outlined above, the participants felt that ethos encapsulates and articulates a school's values (and that therefore, "values… operationalise the ethos" (Green, 2009, p198)), whilst at the same time also shaping and challenging them. The link between ethos and values was suggested by Angus (1998), Ball (1990), Boldt (2000), Deal and Peterson (1999), Donnelly (2000), Ebbut (2002), Furlong (2000), Glover and Coleman (2005), Green (2009), Handy and Aiken (1985), Hyland (2000), McGuinness (2000), McLaughlin (2005),

Monahan (2000), Mulcahy (2000), Pike (2008), Pring (2000), Smith (1995), Smith (1998), Smith (2003), Torrington and Weightman (1989) and Williams (2000). The link was also highlighted by all of the participants and 'values' was used on 214 occasions in the interviews, highlighting the interchangeability of the two terms.

As the literature found, this interchangeability of a range of terms was apparent in the research, with the participants often consciously or unconsciously using another connecting word alongside or substituting it for ethos. Alongside *values*, 'ethos' was used coterminously with *culture* (Angus, 1998; Deal and Kennedy, 1983; Deal and Peterson, 1999; Ebbutt, 2000; Furlong, 2000; Glover and Coleman, 2005; Higgins-D'Alessandro and Sadh, 1997; Hopkins, 1994; Hyland, 2000; McMahon, 2001; Prosser, 1999; Solvason, 2005; Torrington and Weightman, 1989), *atmosphere* (Frieberg, 1999; Glover and Coleman, 2005; Graham, 2012; Stockard and Mayberry, 1992), *mission* (Lambkin, 2000), *spirit* (Lambkin, 2000; Williams, 2000), *climate* (Dellar, 1998; Glover and Coleman, 2005; Kuperminc et al, 2001; Moos, 1979; Mortimore et al, 1988; Smith, 1998) and *identity* (Bakker and ter Avest, 2005; De Wolff, 2000; Lambkin, 2000; Williams, 2000).

It would seem that it is not possible to define ethos without acknowledging other connecting terms, and perhaps this suggests that neither ethos nor the other terms can exist in isolation from each other. Any definition of ethos therefore needs to acknowledge that some of the other terms, "have clearer meanings" than ethos and which, "by lending some of their meaning to the notion of 'ethos', enable the meaning of 'ethos' itself to be illuminated and discerned" (Allder, 1993 in McLaughlin, 2005, p309).

This research has found that the eight terms, or *connectors*, identified above are those most frequently associated with, used alongside, or substituted for 'ethos' and argues that, as these are used interchangeably and so frequently, each and all must contribute to a clearer understanding of the term. The results of the research lead to a conclusion that, if each and all are important then only *together* do they create a clear picture of the ethos of an organisation and that without one of the connectors the picture is incomplete.

But how to do this in a way that is intelligible? Although Glover and Coleman (2005) have attempted to delineate between the *measurability* of climate, the *integration of operational elements* within culture and the *subjectivity* of ethos, the other terms have characteristics which need to be highlighted in an attempt to delineate between them all. This includes the *specificity* of environment (ibid), the positive or negative *impact* of atmosphere (Elton, 1989; Mortimore et al, 1988), the *coherent connectedness* of identity (de Wolff, 2000; Bakker and ter Avest, 2005), the *goal-focus* of mission (Lambkin, 2000), the *character, traditions and history* of spirit (Williams, 2000) and the *living out of what is important* of values.

Essentially this is distilled to:

| culture | climate | environment | atmosphere | identity | mission | spirit | values |
| STRUCTURES | MEASURABILITY | CONDITIONS | FEEL | COLLECTIVITY | GOAL | ESSENCE | VALUES |
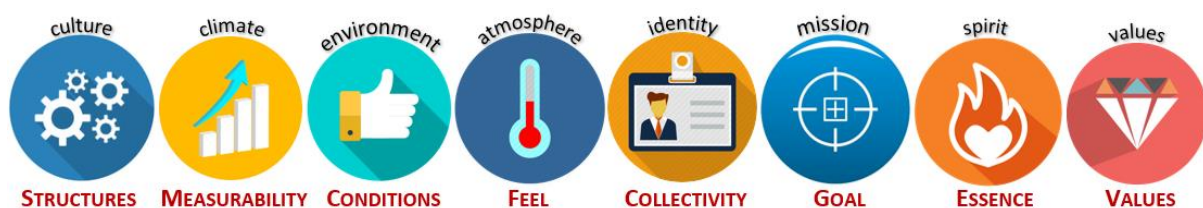
Each has an identifiable characteristic, yet, from the literature studied and the data gathered, it would seem that neither truly exists in isolation and each is, to a greater or lesser degree, dependent on the others. To understand ethos therefore it is necessary to take all of the connectors together to gain a true picture and the following model (Figure 1) is proffered as a way of attempting to do this.

As McLaughlin (2005) links, "the notion of an 'ethos' and Bourdieu's notion of a 'habitus'" (p314), a Bourdieusian analogy has been adopted and adapted. Essentially, Bourdieu's (1977) concept is that our *habitus* defines us. It is all of the social structures which we have inhabited since birth which produces our thoughts and actions, resulting in our tastes, practices and work, our life-styles and worldview. We then take these subconscious attributes into whichever *field* we find ourselves, each field having its own logic and rules into which we fit to the degree that our habitus has prepared us. This preparation for existence within fields is through how much *capital* we have accumulated, whether economic, cultural, social or symbolic, and the amount we have determines our relative position within the field.

Bourdieu's concept of 'field' has sporting resonances, especially with his contention that, in order to gain capital one must know 'the rules of the game'. The concept proposed below therefore attempts to use the metaphor of the field of 'sport' to try to define the inter-relationship of each of the connectors alluded to above.

The infographic below attempts to demonstrate that ethos cannot and does not exist without the other connectors. Whilst Allder (1993) suggests that ethos is, "rendered intelligible in her view by 'connecting words'" (McLaughlin, 2005, p309), because the word 'ethos' on it its own is meaningless (Barr, 2000), this research has led to a conclusion that, whilst each is capable of being defined *individually*, each contributes to ethos *collectively*. The analogy tries to show that it is all of these attributes together which make up the ethos and that each can have a different impact upon it. If any one of the connectors is changed, then, it is argued, it impacts upon the whole model and, either immediately or over time, the ethos changes. Thus these connectors become *interconnectors*.

A sporting analogy to conceptualise the relationship between 'ethos' and the 8 *interconnectors*:

Culture: How the game is played: the structure (4:4:2), the tactics; the team work (how they play together; the unspoken being in the right position at the right time)

Values: The things that are important to the team/club (winning; sportsmanship; community work; youth academies; succession planning) and how they are put into practice.

Climate: How the team's performance is judged by the final score; points awarded; position in the league

Ethos: The team colours, crest, fan-base, supporters' club; what it means to be a 'red' rather than a 'blue'

Spirit: All of the history, traditions and other elements brought to the team/club by the players and fans

Environment: The conditions of the pitch

Mission: The desired outcome of the match/fixture, in relation to the bigger picture (league; cup; competition)

Atmosphere: The rivalry between the teams/ clubs; the support/ silence of the crowd

Identity: The strength of the individual players and how they make up the sum of the team

Figure 1: A Sporting Analogy to conceptualise the relationship between 'ethos' and the 8 *interconnectors*

So where does this fit with the concept postulated by Donnelly (2000), Eisner (1994), Hyland (2000), McLaughlin (2005) and Solvason (2005) that ethos is to be found in the 'gap'? Although PrimP2, PrimP3, PrimP4, TUO and SEO1 echoed the views of Bakker and ter Avest (2005), Ebbutt (2002), Hogan (1984), Rowe (2000) and Smith (2003) that an important element of ethos is its being, "purposefully designed" (PrimP2) and written down, participants and respondents were also clearly cognisant of this tension between its formal articulation and the lived experience (PrimP2; EdCon; ChEd1).

It could be argued that the official, intended, formal ethos (Bakker and ter Avest, 2005; Donnelly, 2000; Green, 2009; Harman, 1984; Hogan, 1984; Jones, 2013; McLaughlin, 2005; Smith, 1995; Williams, 2000) refers back to Bourdieu's 'rules of the game'. Within the sporting analogy this therefore becomes the rules of the particular sport, which then frames the model above; these are written down, reasonably immutable and taken as read. In the same way as the rules of the game are the formal parameters within which the team/club operates, the formal ethos of an organisation is therefore the 'rules' within which it carries out its business and daily life.

The participants and respondents were clear that ethos cannot just be formally articulated, and agreed with Bakker and ter Avest (2005); Donnelly (2000), Hatton (2013), McLaughlin (2005) and Monahan (2000) that it must be a natural, evolving, lived experience. In the same way that, whilst the rules of the sport can be imposed but not the individual approach of the team, participants opined that ethos must be marriage of that which is handed down and that which is embraced (Berkhout and Wielemans, 1999; Boldt, 2000; Cibulka, 1994; Kogan, 1975; McLaughlin, 2005; Williams, 2000; Wilmott, 1993).

Previous research has concluded that ethos requires connecting words in order for it to be defined in a meaningful way, and this study agrees. However, this research argues that, to truly understand ethos, one must consider, in totality, the *collective* impact and inter-relationship between ethos and these eight interconnectors. Only when all are considered collectively can there be a clearer understanding and identification of the ethos of an organisation.

In addition, previous research has also concluded that an understanding of ethos is to be found in the gap between formal and informal, intended and lived. Again, this study concurs, although contends that, within this 'gap' the true ethos floats around (like Williams's, "mercury" (2000, p165)) in a way that still eludes an accurate identification. Where this research tries to expand upon this is in arguing that not only is ethos found in this space, but – framed within the parameters of a formalised statement of ethos (the 'rules of the game') - the true 'lived' ethos of an organisation is identified at the *intersection* of its culture, climate, environment, atmosphere, identity, mission, spirit and values. Furthermore this research proposes an *ethos test* which, in isolating the characteristics of the interconnectors, identifies more precisely the elusive concept of an organisation's ethos.

The Controlled Sector

Attributes

Echoing the work of Byrne and McKeown (1998), participants agreed that the Controlled Sector is complex, mixed, broad and diverse, not least in how it is governed, represented and administrated. There was a clear feeling that it is unsupported, due, in part, to an ineffective employing authority which is in disarray, and that schools are left to their own devices much more than in the Maintained Sector. Governance is piecemeal and, too often, issues which need to be addressed centrally are abnegated down to unprepared school leaders and governors, leading to a sense of isolation, directionlessness and overload which is stretching the sector beyond capacity. Unsurprisingly, whilst the Policy-maker cohort spoke of these issues, it was the Principals who articulated concerns with most passion, especially the Nursery representative, who was indicative of a phase which feels itself under intense pressure, due to the public funding of private providers and a proliferation of Integrated nursery schools.

This sense of 'paddling one's own canoe' has contributed to the contestation and tension (Byrne and McKeown, 1998; Armstrong, 2015) over the sector, with by far the greatest point of contention existing over its religious identity. Whilst there is no real dispute with Byrne and McKeown (1998) over its being open to those of all faiths and none, the two major issues are whether it is Protestant or secular.

Whilst there was a reasonably clear position taken by respondents and participants over the sector not being secular, there was ambiguity throughout the research on its being Protestant, especially as there was scepticism over a clear meaning for the term and a view that, in today's NI, it was as much a social or political term as a religious one. It is interesting to note that, in the interviews, the term 'Protestant schools' was used 7 times as opposed to 'Catholic schools' being used 25 times, 'Catholic Maintained schools' 4 times and 'Catholic Maintained Sector' 6 times, with no reference to Protestant within a title for the CS.

As identified by McGrath (2000) and Byrne and McKeown (1998), there was a sense of frustration at perceived inequity with the Maintained and Integrated sectors over funding, political backing, and practices over transfer to post-primary schooling. There was also the envy suggested by McGrath (2000) over the Maintained Sector's overt commitment to religion noted by Donnelly (2000) and Williams (2000) and, as identified by Pike (2008), the importance of this position to a sector which sees matters of faith at its core. Participants also noted how much better the Maintained Sector is at dealing with ineffective outcomes and leadership, and suggested that the lack of adequate, centralised performance-management, the lack of trust - identified as so important by Rowe (2000) and Smith (1995) – in the EA, the autonomy of Controlled schools, and perhaps a particular 'Protestant' mind-set has led to a degree of protectionism within the CS.

Participants agreed with Byrne and McKeown (1998) that the Controlled Sector does not have the same 'commonality' as the other two sectors, especially the Maintained Sector, and were concerned that, collectively, Controlled schools have no unique selling point for parents. Whilst there is a strong sense of community surrounding each Controlled school, there is not that same sense of the sector-wide, collective community, identified by Halloran (1982), Hatton (2013), Ogbanna (1983) and Williams (2000), which the Maintained Sector enjoys, due to sport, culture, CCMS and the influence of the Catholic church.

All of this, therefore, has created for the participants a sense of Controlled schools which exist as individual entities, each different, each with their own ethos.

Ethos

Yet, in contrast to NIA (2009), most participants did feel that the sector has an ethos, albeit one which is less evident than in the other sectors (DENI, 2006), one on which there are, "divergent views" (Byrne and McKeown, 1998, p337), and one which, as Barber (1994) found in England with the move from church to state control, is quite clearly contested. This lack of agreement is also due to uncertainty over who was supposed to take responsibility for the ethos of the sector, with participants feeling that DE and Education Authority have 'washed their hands' of this, and, although there was a sense of collectivity within each ELB, the ELBs similarly stepped back, tacitly to allow the churches, through the TRC, to take the lead.

A definitive leadership of ethos, cited earlier as being so important, was therefore found to be elusive and inconclusive. Despite the requirement for the clear, influential voices (Ball, 1990) of powerful people (Francis, 2015; Grek, 2011) and the participants' understanding that the control of ethos is the struggle for the control of power (Olssen et al, 2004; Scribner et al, 1994), there was little consensus over who currently leads or who should take the lead.

In suggesting that ethos should be shared between leadership and staff, the views of the participants were laudable and echoed those of Barr (2000), Coolahan (2000), Hatton (2013), Rowe (2000) and Williams (2000). Likewise, their identification of the need for agreement between leadership and governance resonated with the views of Rowe (2000) and Smith (1995), and their understanding that, in reality, it is principals who should take the lead on ethos compared with that of Green (2014), Smith (1995) and Smith (2003). What these views lack, however, is an ability to see beyond the school level to that of the sector and who should take the lead on an ethos.

In considering who actually does control the ethos of the sector, the answers were similarly parochial. Whilst the second and third answers of respondents were the Education Authority and DE (totalling 31.88% (n=44)), the first and fourth were Principals and Governors (totalling 47.1% (n=65)), again suggesting that ethos is viewed on a school level, despite the wording of the question being clearly about the sector. This was reflected in the views of the participants, only one of whom cited DE and EA, one of whom cited the CSSC and three of whom identified the influence of the Protestant churches. For the rest, the key influencer of the ethos of the *sector* was stated to be a person or group affiliated with *an individual school*.

It could be argued therefore that the difficulty in defining the current ethos of the Controlled Sector is because of this lack of clear sector-wide ethos-leadership which has resulted in it becoming the sum of the ethoi of its constituent schools as defined by their *individual* leadership. In the same way as ethos can be found in the gap, it would appear that ethos can be *created* in – and, indeed, by - the gap or vacuum of ethos-leadership.

Green (2014) suggests that abnegating ethos downwards can lead to its being diluted, and the participants believed that any ethos which may have existed in the Controlled Sector has been and is being similarly watered down, with fears which resonate with Hogan's (1984) ethos of accommodation. Any residual ethos which may still exist is neither overarching, nor does it unify this, "fragmented sector" (PrimP4).

Where participants were able to identify a sector-wide ethos they characterised it as echoing positive ethos-attributes determined by the literature: open (Glover and Coleman, 2005), inclusive (Donnelly, 2000 and 2004; Hatton, 2013), tolerant (Mulcahy, 2000) and increasingly integrated (Donnelly, 2000). If there was some ambivalence around describing the sector as Protestant, there was less around whether it has a Protestant ethos: although schools should be linked closely to (Smith, 1995; Smith, 2003) and serve (Pike, 2008) their local communities (and, for Controlled schools these are, in the main, Protestant communities), in contrast with the views of Akenson (1972) and Barnes (2007), participants felt that there was very little to suggest a Protestant ethos and, in contrast to Hagan's (2016) description of entering a Maintained institution, certainly nothing overt.

However, there was much more certainty around the use of Cooling's (2009) and Green's (2014) 'Christian ethos' to describe that of the CS, with respondents and participants alike using it liberally. Apart from the legal position (Armstrong, 2009; PCI, 2008) cited by many of the participants around the provision of RE and collective worship in securing a *de facto* Christian ethos, and views on the historical roots of the system which echo the importance placed on history by Furlong (2000), Handy and Aiken (1985), Solvason (2005) and Smith (1995), participants spoke warmly of the Christian principles and values which underpin the daily life of Controlled schools.

It was interesting and is important to note the participants' views on the different degrees to which any Christian ethos is manifested in each of the phases. However, it is most likely that the vagaries can be explained on two levels:

First, Controlled nursery and special schools have traditionally been seen as the local school, rather than the local *Controlled* school, and therefore take in children from all backgrounds; post-primary schools are larger institutions with a more academic focus and less time in the time-table to explore issues of Christianity, being constrained by curricula; primary schools are smaller institutions, with more of a 'family' feel, where RE classes are less constrained and assemblies have a less formal feel and are more important in the celebration and exploration of issues, rather than the dissemination of information in post-primary.

Secondly, it could be argued that any Christian ethos is directly linked to the degree to which there is church involvement within the various phases. Below is a summary of the most popular answers to qq60-64 which considered respectively whether respondents saw their schools as 'church-related' (Definitely; Largely; Somewhat; Not really; No); how they would describe their links (Very close; Close; Quite close; Nominal; Non-existent) and relationship (Non-existent; Formal; Useful; Close; Partnership) with the local Protestant churches; the area in which the churches are most involved (Governance; Assemblies; RE; Pastoral); and the level to which respondents would like them to be involved in the life of the school (1-7, with 1 as the highest).

Comparative results between phases for questions 60-64

Phase	Church-related	Links	Relationship	Area	Desired Involvement
Primary	Definitely	Very close	Close	Assemblies	2
Secondary	Largely	Close	Close	Governance	2
Grammar	No	Quite close	Formal	RE	6/7
Nursery	No	Non-existent	Non-existent	Pastoral (no Assemblies)	7
Special	No	Non-existent	Non-existent	Pastoral (no Governance)	4

Table 1: comparative results between phases for questions 60-64

The table suggests a correlation between the answers and the views of the participants regarding the 'strength' of any Christian ethos within the five phases. The Primary phase, which is cited as having the most evident Christian ethos is, according to the respondents, the most 'church-related', has the closest links and relationship with the churches, has a Christian message delivered to a large proportion of the school population through assemblies and clearly desires involvement from the churches in the life of the school. The Nursery and Special phases were cited by participants as those with the least obvious Christian ethos, and the respondents' answers demonstrate how little linkage there is with the churches. Their choice of 'Pastoral' also suggests that any Christian influence from the churches would be with small numbers of people on an *ad hoc* basis. Given that ten of the participants specifically alluded to the link between a Christian ethos and assemblies/RE, and that all but two cited the churches' role on Boards of Governors as a vital link, it is noteworthy that the Nursery and Special respondents respectively had no assemblies or governance input from local churches.

The above leads to a contention that any Christian ethos within the sector is influenced by the size of the school, academic focus, curricular constraints and time to explore and celebrate issues of faith. The research also leads to a conclusion that a Christian ethos is dependent on historical links, the

churches' delivery of assemblies and input into governance, the closeness of the existing and desired relationships between individual schools and churches, and the size of the population within the school which is regularly exposed to a Christian message.

The conclusions reached in considering the attributes and ethos of the Controlled Sector are that it has felt isolated, unsupported and lacking in leadership. This has led to a fragmented sector, the ethos of which is hard to define, with the exception of its link to Christian values, which is stronger in some phases than others. Applying the ethos test to the sector, it could be suggested that the characteristics of its 8 interconnectors are:

Interconnector	Current characteristics
Culture	Individual schools, each with their own ethos, feeling that they are working in isolation
Climate	Schools being made to feel that they are not achieving as well as they should
Environment	An uncertain and challenging educational landscape with no body to advocate or represent Controlled Sector interests
Atmosphere	Sense of distrust, disconnect and frustration with educational authorities who leave the tough decisions to individual schools
Identity	Individual schools, with little or no connect between them, and very few opportunities to connect with other phases
Mission	To celebrate in a unified way the impact that Controlled schools have upon the pastoral, spiritual, moral, physical, emotional and academic needs of its pupils, but with no mechanism to do this
Spirit	Historically linked to the Protestant churches, with a Christian character, but scared of and uncertain in articulating this in contemporary society
Values	Inclusive, open and increasingly integrated; built upon the foundations of a Christian tradition, albeit with these being expressed to different degrees in the various phases

Table 2: the current characteristics of the Controlled Sector's ethos interconnectors

This leads to a conclusion that the current ethos of the Controlled Sector is of a sector which is *unrepresented, disconnected, distrusting, under-appreciated and frustrated. It is made up of individual entities, which feel isolated and unconnected and, although it is historically linked to Christian values yet open to all, it is unable, unwilling and uncertain in articulating what it does and what it stands for*.

The Who

The Role of the Protestant Churches

Historical

It was interesting to note how all of the Policy-maker participants spoke knowledgably and at length about the history of the link between the churches in education (as outlined by Akenson, 1972; Byrne and McKeown, 1998; Armstrong, 2009 and 2015), whilst only two of the Principals (both from the primary phase) did. Whilst this might suggest an unfortunate disregard for the historical context of their own workplaces, perhaps it indicates a lack of awareness, or a lack of being made aware, through any sort of induction into the sector, which the participants found sadly lacking, or any sense of a collective.

Contrast this with the Policy-maker cohort, all of whom inhabit the small 'policy bubble' akin to what Isaakyan et al (2008) found in Scotland. Each of these actors, whilst having a variety of specific roles (Berkhout and Wielemans, 1999; Grek, 2011; Lingard et al, 2005; Isaakyan et al, 2008), know and work with each other and have a relationship which involves the interchange of information and knowledge. It is arguable that each is intimately aware of the history of the churches' involvement based on this knowledge-sharing, and it is also arguable that their awareness comes from their own career development. However, what is equally arguable is that each of the cohort at some stage in their careers has sat across a table from or been lobbied by representatives from the Protestant churches who have apprised them of the history as a context to legitimise their continuing involvement in education.

There was an understanding and acknowledgement of the *quid pro quo* arrangement outlined by Armstrong (2015) which has existed between the churches and the State, with regards to policy consultation, rights of nomination onto key bodies and individual school governance, and a recognition of Byrne and McKeown's view (1998) that much of what the churches have done since Partition has been underpinned by their desire to protect and maintain a Christian ethos in the CS.

Governance

It was unsurprising that the Grammar and Nursery participants did not speak eruditely about the churches' role in governance, although a little surprising that the Special participant did, as these three phases do not have Transferor Representatives on their Boards. However, it is further evidence of the lack of a collective, shared understanding of the sector which SecP bemoaned, stating that there has not been the opportunity, until the arrival of CSSC, for representatives of the various Controlled Sector phases to meet together.

Of the rest who did speak with knowledge of the churches' work through governance, it was interesting that many perceived it as a missional rather than policy-related opportunity for the churches. Indeed, through the participants' views on those who become Transferor Governors and are given key positions on the boards, it can be perceived that there is a feeling that those who serve are not always best placed to do so. If a key role of being involved at governance level in schools is to further a Christian message, then who better than the local minister? However, if the role is about strategic governance within a challenging economic, social and educational context then perhaps the

clergy do not always possess the appropriate skillset. Therefore it would seem vital that Transferor Representatives are selected both for their ability to represent (and understand) their 'constituency' and to bring to the table the appropriate knowledge and skills required of a board member. In addition, the churches need to understand the potential influence, power and control which this brings over the life of a school and its ethos. There is a clear interconnection between wise selection, effective Transferor-specific training and influence at school level.

Influence

As was identified in Table 2, there is also a clear link between the level of involvement of the churches in a school's daily life and their influence. The various examples of practical support cited by the participants suggested arrangements which were mutually beneficial, but most importantly, built up the *relationships* which were suggested by Canavan and Monahan (2000), Charles and McHugh (2000), Coolahan (2000), Dellar (1998), Donnelly (2004), McGuinness (2000), Moos (1979), Smith (1995), Smith (1998) and Solvason (2005) as being so vital for the growth of ethos.

Yet, caution was expressed by the participants: as outlined by Glover and Coleman (2005) and Smith (2003), relationships are changing; the churches' monopoly (Clarke and Woodhead, 2015) is being undermined by new denominations which are good at 'getting their sleeves rolled up' to help individual schools and by other organisations with their own agendas who step in to provide support on contentious issues that Education Authority and the churches may avoid. Relationships which commonly exist are dependent, in the main, through individuals and the time which they put into building interactions, but the churches cannot rely on historical links, hoped-for *quid pro quo* and seats at policy tables to retain credibility. As Pike (2008) has suggested, the role of the churches is to serve and participants felt that they need to emerge from a comfortable, lazy, complacency behind board and committee tables and get into society to ensure that they use, rather than lose their influence.

The research has therefore found another 'gap' around the understanding of the churches' role in education, with a clear grasp of this at school level, but much less so at sectoral level. Although those involved in policy understand the history and current involvement of the churches, those in schools clearly do not. There does not appear to be any inter-connectedness between these two elements of the churches' involvement, apart from in the delivery of RE, in which they have designed the curriculum and also engage in delivery.

Yet RE in N. Ireland is problematic: first, according to the research, the churches' rights to teach, assess and inspect the subject is rarely used, especially with the latter two; secondly, RE is often confused with religious instruction, with church representatives (and some teachers) using it as an opportunity to evangelise; thirdly, this has led to a subject which is often ineffectively and uncreatively taught, resourced and supported, and often confused with Literature (this is a great story), or History (this story really happened) rather than Religious *Education* (what can we learn and apply from this story?).

Although Williams (2000) suggests that schools with a faith ethos should foster a commitment to that faith, participants agreed with McAleese (2000), Hyland (2000) and Kitching (2013) that this should not be done by imposition or indoctrination. Yet there was also an agreement with Pike (2008) that the current society was increasingly losing any Biblical or faith literacy, and with Clarke (2000) and Hagan (2016) that schools should defend their right to espouse a faith basis, starting by a greater understanding of the one they are most comfortable with, then balancing it within the context of a

more multi-faith society (Hagan, 2016) to ensure that the diverse range identified by Clarke and Woodhead (2015) of "worldviews and truth claims" (Pike, 2008, p76) are being engaged with.

It was interesting to note the concerns of PrimP2, PrimP4 and NurP who, whilst being happy to engage with other faiths, would be less comfortable in promoting them; concerns which, it could be argued, substantiate a view of the school as a means of *instructing in*, rather than *educating about* religion. This confusion over the role of the school in promoting faith and the confusion over the purpose of RE mirrors the general confusion over the Controlled Sector ethos. Perhaps another source of confusion is the *assumption* cited by SEO1 that a Christian ethos underpins the sector, alongside an unwillingness to actually openly discuss this. In the same way as there is uncertainty and even fear over what can be said in an RE class, there are similar concerns over how openly such an ethos can be espoused in a society which, according to the participants and Brown (2010, Bruce and Voas (2010), Clarke and Woodhead (2014), Hemming (2011) and Voas and Crockett (2005), is rapidly changing.

All of the above lead to the conclusion that, in this area, as in others found in the research, clear leadership and direction is needed, in order for schools and school leaders to overcome the lack of a vocabulary (Green and Cooling, 2009), speak with a common language (Deakin Crick, 2002) and to, "come clean" (Pike, 2008, p8) about what they stand for.

The Controlled Schools' Support Council

There appears little doubt that the introduction of the CSSC is timely. The paragraph above alludes to leadership and language, and these two elements are key to the context of CSSC's arrival. The participants' growing impatience with the narratives (Ball, 2013; Francis, 2013; Nicholl and Edwards, 2004) of DE, resonate with the view of Edwards et al (1999) that they have been used to create a reality removed from that which the participants recognise. Likewise, the abnegation of responsibility for ethos and other elements of school life by DE and Education Authority has undermined trust and led to frustration, as has a perceived dysfunctionality of EA. These, alongside the clear inequity identified by Byrne and McKeown (1998) and Armstrong (2015) between the Controlled Sector and its two main counterparts with regard to advocacy and representation, have all culminated in a resounding welcome for the organisation from the Principal cohort and a favourable reception from the Policy-makers.

That there were two Policy-makers who were more cautious in their welcome can be attributed to the fact that one had to make political compromises over its introduction and the other represents the organisation with which there will be most overlap with the functions of CSSC. These two and TUO also raised the question of the control of the CSSC; whilst there was a general consensus amongst the participants that the churches, through the TRC, had had a key role to play in influencing politicians to legislate for CSSC, the three participants - in agreement with the views of Byrne and McKeown (1998), Donnelly (1997) and McGrath (2000) that the churches' influence in education was being clearly eroded - suggested that the whole project was an exercise in power (Olssen et al, 2014) on behalf of the churches.

The need identified for the organisation to prove itself is especially true within the context of initiative- and quango-overload and the constrained financial circumstances in education. The fact that this and the view that it had little power were so quickly overlooked by the participants and respondents demonstrates that the above factors are of more long-term importance to the sector than its immediate problems, suggesting a clear desire for representation, advocacy and leadership; it could

be argued that the sector believes that gaining these things will lead to an alleviation of their current problems.

It is noteworthy that *Representation* was seen as more important than *Advocacy* for respondents and participants, especially in light of the fact that CSSC describes itself as an advocacy body. It is interesting therefore that participants and respondents saw the role of influencing decision-making as less important than the role of speaking on behalf of Controlled schools. However, this should not be surprising, given the earlier comparisons with the other sectors and the obvious desire for a, "voice" (NIA, 2012) which, as suggested by Brahnam (2008), Graham (2012), Halloran (1982) and Smith (2004), is trustworthy and credible. This credibility will come through a Board and staff which can be trusted to speak for the collective knowledgeably, passionately and professionally (Arvidsson, 2012), through experience, empathy and research, and through the adroit use and understanding of the media (Ball, 2013; Lingard and Rawolle, 2004).

It was initially surprising that so few of the respondents selected ethos development as the most important of the CSSC's roles, but, upon reflection during analysis, it became apparent that q45 did not give room to get the feel of the respondents on this issue as Representation and Advocacy were key to the majority.

Authors of the Vision Statement

It appears uncertain whether, despite the assurances of those involved with the creation of CSSC, there was adequate consultation around the Vision Statement, with both respondents and the Principal cohort quite vague on whether they had been included. There is evidence to demonstrate that the Vision Statement was discussed at two open meetings, five roadshows and at a number of meetings with key actors within the ELBs, along with representatives of the two other main sectors. Whether this constitutes the fully accountable, democratic process desired by one of the participants, however, is open to debate in light of the responses from the Principals.

What is clear is: of the three original CSSBWG officers, two were church education secretaries; the original chair was replaced by a member of the TRC Executive who gave an update at each meeting; and the (largely unchanged) wording of the Vision Statement was written by one of the church education secretaries. The obvious conclusion to this is that the Vision Statement is - albeit on behalf of the original CSSBWG - the work of the Protestant Churches and owes much to the influence and power wielded by individuals (Francis, 2015; Scribner et al, 1994), in the form of the two then Education Secretaries.

That said, given the churches' footprint on the document, those who were consulted it on it obviously either had no problem with this, or overlooked it in their identification of the need for work to be progressed on a collective ethos for the sector. The results of this research would therefore suggest that the wording, whilst open to interpretation, is broadly in line with how schools envisage a collective ethos for the CS.

The Why?

Why a single ethos?

The critical importance of ethos cited by participants echoes the views of Strivens (1985), although for Graham (2012) it is about pedagogy and school improvement, whereas for the participants it was about unity and identity for the sector. For them, the strength of a single ethos is in articulating a single, coherent message found lacking by Byrne and McKeown (1998) and NIA (2012), which would provide the clarity suggested by Barr (2000), the openness advocated by Pike (2008) and the obviousness noted by Donnelly (2000) and Williams (2000) in other sectors.

It was interesting to note the order of importance afforded to the four choices for the purpose of a single ethos (q36), as it was assumed that respondents would agree with participants regarding its primary role being to provide a greater sense of collective identity. However, upon reflection it became apparent that the respondents saw the clear link between ethos and values cited earlier by participants and see ethos more about 'what we stand for', rather than 'how we do our business', or 'who we are'. However, the phase-specific vagaries noted in the Findings section were noteworthy, given the Special sector having had no real sectoral-allegiance nor champion in the past, Nursery having an historic ambiguity, being perceived as 'State' more than 'Controlled', and Grammar being driven by results.

Once again, the research threw up the issue of the collective versus the individual. Whilst the sector is happy to have an overarching ethos (Callewaert, 2006), schools wish to retain the autonomy of ethos espoused by Mulcahy (2000): it must be an umbrella (Armstrong, 2015) under which an individual school's ethos should sit. As identified by Ball (1990), Berkhout and Wielemans (1999), Boldt (2000), Cibulka (1994), Kogan (1975) and Wilmott (1993), it cannot be dictated or imposed, but must have the cyclical dynamic identified in the enactment process (Ball, 2013; Hardy, 2014). The difficulties presented in creating a sector-wide ethos mirrored the issues of context found in the literature, such as that over geography (Isaakyan et al, 2008; Murray, 2000), diversity (Byrne and McKeown, 1998) and leadership (Green, 2014; Smith, 1995; Smith, 2003).

Again the research has found a gap, this time between a desire to have the sector defined by an ethos, without having individual schools defined by it. What participants seemed to want is a single ethos to be a shared, overarching, coherent umbrella that gives a sense of collective identity and understanding of the sector's expectations, yet, at the same time being broad enough to recognise that one size doesn't fit all and to give schools scope to retain their own identities. The question which arises from this is whether it is possible to develop an ethos for the sector which has these attributes and whether the Vision Statement will form the basis of such an ethos.

Why the Vision Statement?

Language

McLaughlin (2005) argues that an ethos should be value-laden and coherent and participants agreed that these two attributes existed in the Vision Statement. Where they diverged somewhat was on Glover and Coleman's (2005) view that it should be clear and defensible, with some concerns over its

breadth and the ability for this to be misinterpreted, and over a general blandness of language which might lead to confusion.

Whilst there was a recognition of why 'non-denominational' was used, it was somewhat surprising that so many of the participants questioned its inclusion given the N. Ireland context. Notwithstanding the (few) cautions around potential inclusivity problems with the word 'Christian', there is no doubt that the phrase, "within the values of a Christian environment" both reads and resonates better, yet, with the sensitivities around faith in NI, such a phrase would probably have led to heated debate within the sector. In a country where one branch of the Christian faith may not recognise the validity of another, and in schools in which there could conceivably be over 20 different Protestant denominations represented, it is probably simplistic and possibly naïve to raise this issue.

In suggesting that 'non-denominational Christian' was preferable to 'Protestant', the discussion around the term 'Protestant' was surprising, especially given that the term, "Protestant faith" was used 30 times in the interviews, as opposed to the 7 uses of, "Catholic faith."

Purpose

Discussion around the purpose of the Vision Statement led to some interesting points. Not only might the Vision Statement, in leading to a single ethos, more greatly define and unify the sector, but it might echo another of McLaughlin's (2005) ethos characteristics in that it articulates and clarifies that which is already the norm in the sector. However, this stood in contrast with concerns from one participant over what might happen if a school has an ethos which is at variance to the Vision Statement, which echoed another of McLaughlin's characteristics about ethos being undermined by, "forms of inconsistency, conflict, fragmentation and disharmony" within it (p313).

One of the other by-products of the Vision Statement was cited as its being a vehicle for discussion around ethos, as encouraged by Donnelly (2000; 2004). This is noteworthy in that, if schools wish to have an umbrella ethos under which their own ethos will sit, then arguably this role of the Vision Statement may change the school's ethos to some degree, as staff engage in discussions around what it means, as articulated in the Vision Statement, to be a Controlled school. Therefore, it is very difficult to imagine a situation in which a school's individual ethos will remain exactly the same following the acceptance of a sector-wide ethos.

Another interesting role of the Vision Statement is in the confidence it will bring to articulating ethos. Earlier it was discussed that schools are scared to articulate what they stand for and need the words with which to do this (Green and Cooling, 2009; Deakin Crick, 2002). If the words of the Vision Statement are not just an aspirational ethos (Donnelly, 2000) and relate to and agree with the priorities of individual schools' ethoi (ethos of inward attachment (ibid)), the question will be whether the schools agree with and buy into these words, rather than paying lip service (ethos of outward attachment (ibid)).

Whilst the general consensus was that the Vision Statement would not be responded to as a policy directive, this contrasted with the views that schools will adapt it for their circumstances, echoing the literature on policy implementation, enactment, interpretation and translation. The views of the participants and Ball's (1993) position on texts being read and re-worked, "in different ways by different actors" (p11) would lead to a conclusion that school leaders, as Ball's policy *entrepreneurs* (2011a), will consider their context and adapt the Vision Statement accordingly.

Impact

However, should the Vision Statement be accepted as an overarching statement of a single ethos, what might be the potential impact upon the sector? In again applying the ethos test, the following suggests how the characteristics of the 8 interconnectors might be impacted by the introduction of the CSSC and the adoption of the Vision Statement:

Interconnector	Current characteristics	Potential impact of CSSC & Vision Statement
Culture	Individual schools, each with their own ethos, feeling that they are working in isolation	A collective of schools, whose individual ethoi sit under a single 'umbrella' ethos
Climate	Schools being made to feel that they are not achieving as well as they should	Schools supported, "in providing high quality education"
Environment	An uncertain and challenging educational landscape with no body to advocate or represent Controlled Sector interests	An uncertain and challenging educational landscape with a body to advocate and represent Controlled Sector interests
Atmosphere	Sense of distrust, disconnect and frustration with educational authorities who leave the tough decisions to individual schools	Sense of trust and connection within a body which advocates and represents Controlled Sector interests
Identity	Individual schools, with little or no connect between them, and very few opportunities to connect with other phases	Schools connected via membership, communications and events
Mission	To celebrate in a unified way the impact that Controlled schools have upon the pastoral, spiritual, moral, physical, emotional and academic needs of its pupils, but with no mechanism to do this	To celebrate in a unified way the impact that Controlled schools have upon the pastoral, spiritual, moral, physical, emotional and academic needs of its pupils through the CSSC.
Spirit	Historically linked to the Protestant churches, with a Christian character, but scared of and uncertain in articulating this in contemporary society	Historically linked to the Protestant churches, with a Christian character, which is clearly articulated.
Values	Inclusive, open and increasingly integrated; built upon the foundations of a Christian tradition, albeit with these being expressed to different degrees in the various phases	Inclusive, open and increasingly integrated; built upon the foundations of a Christian tradition articulated across all phases.

Table 3: a comparison between the characteristics of the Controlled Sector's current and potential ethos interconnectors

This projected impact could lessen the degree to which an ethos is created in an ethos-leadership vacuum and could conceivably lead to an ethos for the sector which would be quite different to that suggested currently. Such an ethos could be that the Controlled Sector is *represented, connected,*

trusting and supported. It is made up of individual yet connected entities, is open to all, clearly articulates its Christian foundations and celebrates what it does.

Whilst the above is potentially a very positive step for the sector, it is, however, questionable whether it will have the same impact at school level or can have the same impact in any two schools. This is because of the view above that schools will respond to it according to their context and interpret, translate and enact it in different ways. It is also because of the very fact that every school already has their own ethos, each of which will be the sum of the characteristics of their 8 ethos interconnectors. No two ethoi are alike because their interconnectors will never be exactly the same and, even if only one of the interconnectors is different, this will create a different ethos. In the same way, therefore, dependant on how many of the interconnectors might be impacted by the Vision Statement, consequently each ethos will be impacted in different ways and to different degrees. That said, what it could bring to schools is a closer sense of a collective in bringing some commonality to some of their interconnectors.

Inclusivity

In understanding that the CSSC will need to approach the dissemination of the Vision Statement carefully and tactfully, participants agreed with Ball that it cannot, "arrive 'out of the blue'" (1993, p11). Recognising that it will carry with it historical baggage (Furlong, 2000; Handy and Aiken, 1985; Solvason, 2005), with an assumed imprimatur of the Protestant churches, an acknowledgement will be needed that, as suggested by Williams (2000, p77), the use of term 'Christian', "will not be acceptable to everybody." Participants recognised this, yet agreed with Farnell (2004) and Hemming (2011) that those who subscribe to a different branch of the Christian faith and, indeed, those from other faiths welcome an ethos which is explicit in standing upon faith values.

In suggesting that the purpose of schools is to open minds rather than close them, participants' views resonated with McLaughlin (2005, p321), who argues that schools should deal with, "matters of moral texture and complexity" and with Williams's (2000) opinion that schools should point to fundamental answers and higher goals. Yet there was a clear acknowledgement of the difficulties in doing this in modern society. While there was a clear challenge to the views of Brown (2010) and Hemming (2011) that we are no longer a Christian society, participants were in agreement with Voas and Crockett (2005) that church attendance is dwindling, with Farnell (2004) and Hemming (2011) that fewer parents subscribe to a religious adherence, with Bakker and ter Avest (2005) that teachers are less likely to openly express faith, with Clarke and Woodhead (2015) and Woodhead and Catto (2012) that people are expressing belief in less traditional ways, and with Brown (2010), Bruce and Voas (2010), Hemming (2011) and Voas and Crockett (2005) that society has become more secular.

The one participant who agreed most with Hirst (1972) about education moving beyond religion was the one who most vehemently argued for the separation of church and state, and of church and education. This view resonates with those given as examples by Baumfield (2003), CRE (1990) and Locke (2003) over the public nature of education and the private nature of religion, with the criticisms of faith-based education cited by Berkley (2008), CCMS (2007), Hemming (2011) and Hughes (2011), and with the charge of proselytising inferred by Hyland (2000) and McAleese (2000). Yet, the strength of this participant's views did not reflect the rest of the two cohorts and, perhaps, resonates with the suggestion of Hagan (2016) and Hull (2002) that those who do not come from a faith perspective find it difficult to conceptualise the faith-education connection. Indeed, for the majority of the participants

there was a converse feeling that, for those who do, it is, "incomprehensible to separate faith and learning" (Pike, 2004, p151).

There was a consensus amongst the participants which agreed with Clarke and Woodhead (2015, p6) that religion is still, "an inescapably important aspect of our modern world" and that the Vision Statement is a way to, "come clean" (Pike, 2008, p7) about their commitment to the message (Williams, 2000) which it espouses. In doing so, this will enable parents to make an informed choice about what a Controlled school is and stands for. Although it is an explicit choice for some parents to send their children to a school based on its religion, especially when the faith resonates with that of home (Brady, 1982; Pike, 2008), many do not. However, for the latter, often their choice is made because of the very fact that faith is at the heart of the life of the school (Farnell, 2004; Hemming, 2011).

The Christian values which participants believed were so attractive to parents of different faiths and none echo the sentiments of Pike (2008) on parents wanting different values for their children than those flaunted on TV and other media. As outlined above, the participants agreed with 22 cited examples from the literature of values being integral to education and its ethos, especially with Angus (1998) that these should be based upon shared values. Of course, it is easy to share values with those who agree with them, or who come from and understand one's perspective, but what about those who don't?

As with any walk of life in which a philosophy for living is expressed, people need to see it to believe it. If it is not lived out, people will very quickly become disillusioned and, as suggested by Donnelly (2000) in her appraisal of why some parents opted for integrated education, people can make an alternative choice as a stand *against* what is being espoused, rather than *for* that alternative. Parents and pupils alike can see through empty rhetoric (Pike, 2011) and, if the Vision Statement is to form the basis of a collective ethos for the sector, and if schools are to use it as a confident way of stating what they are and stand for, then parents and pupils will need to see that Christian values stand for all of the positive attributes cited by the participants. If, on the other hand, they see Christian values in a negative light, tainted by the tensions of NI's past and outworked through an attitude of perceived fundamentalist intransigence, such values will quickly become anathema and parents and pupils will feel disengaged and disenfranchised.

The Policy-ethos connection

The research began with a contention that there was a link between ethos and policy and the review of literature found very clear examples of this. In comparing, in the parenthesis, the views of the participants on *policy* to the literature on *ethos*, it is possible to strengthen the contention of this link. Policy, like ethos:

- is about the creation of an *environment in which practice can flourish* (EdCon; Frieberg, 1999; Glover and Coleman, 2005; Graham, 2012; Haydon, 2006);
- must be *coherent* to be effective (ChEd2; McLaughlin, 2005);
- is about the *people* on the ground (TUO; EdCon; ChEd1; PrimP3; SpP; NurP; Canavan and Monahan, 2000; Charles and McHugh, 2000; Dellar, 1998; Donnelly, 2004; Green, 2009; McGuinness, 2000; Moos, 1979; Smith, 1995; Smith, 1998; and Solvason, 2005);

- should involve *discussion and consensus* (ChEd2; Ball, 2013; Coolahan, 2000; Donnelly, 2000; Rowe; 2000);
- should leave some *room for reality* (Pol2; PrimP1; PrimP2; Chadwick, 1994; Donnelly , 2000; Green, 2009);
- should be an *overarching framework* (TUO; SpP; Callewaert, 2006);
- should acknowledge that it will be *interpreted in a variety of ways* (ChEd1; ChEd2; GramP; TUO; Ball, 1993);
- should be cognisant of *context* (SEO1; SERO2; ChEd2; Allder, 1993; Clark, 2000; Fairclough, 1992; McLaughlin, 2005);
- needs to be mindful of the *community* (Pol2; SecP; Pike, 2008; Smith, 1995; Smith, 2003).

Policy, argued the participants, needs to take account of ethos, is interpreted through ethos, is impacted by ethos and is influenced by ethos. The clear connection between the two is that policy too has a "significant gap" (PrimP2), a gap between policy and practice, which is manifested in a gap between the policy 'ideal' (Eisner, 1994; Ball, 1990; 1997; 2006; 2013; Berkhout and Wielemans, 1999) and a 'reality' of practice (Avelar, 2016; Ball, 2006) which is far removed from that of the policy-makers (Ball, 1997; 2006). The bridging of this gap, the, "interface" (SEO2) between policy and practice, is the understanding of the reality of schools and educational professionals.

If there are obvious connections between policy and ethos found in the literature and the research, it would appear that the interconnector is *values*: values underpin both ethos and policy (Angus, 1998; Ball, 1990 and 2013; Ball et al, 2011a; Berkhout and Wielemans, 1999; Boldt, 2000; Braun, Maguire and Ball, 2010; Cibulka, 1994; Deal and Peterson, 1999; Donnelly, 2000; Ebbut, 2002; Furlong, 2000; Glover and Coleman, 2005; Green, 2009; Hill, 1991; Hyland, 2000; Kitching, 2013; Kogan, 1975; McGuinness, 2000; McLaughlin, 2005, Monahan, 2000; Mulcahy, 2000; Pike 2008; Pring, 2000; Smith, 1998; Swanson, 1989; Torrington and Weightman, 1989; Trowler, 1998; Williams, 2000; Wilmott, 1993). The participants believed that values are the basis for ethos and, as such, policy should be shaped, challenged and developed in light of these values: ethos therefore creates a value framework within which policy and practice are implemented.

This raises the question of whether it is possible to receive policy and enact it in practice if it is contrary to the ethos of the school. Philosophically and ideally, it could be argued that it is not, and Donnelly (2000, p152) suggests that ethos explains, "why schools react in different ways to policy initiatives": it would be hard to imagine policy contrary to Islam being warmly received and enacted in a Muslim Free School in Brent, or likewise policy contrary to Roman Catholicism in a Maintained school in Belfast.

However, if there is no defined ethos for the Controlled Sector then it is extremely difficult for an individual school to defend itself against policies which, "conflict" with (SecP) or are, "counter-intuitive" to (ChEd1) its ethos; it is very hard for a single school to 'swim against a tide', and if there are 558 schools with 558 different ethoi, then it is next to impossible to argue against policies which are deemed to be at variance with each. However, if there is one clearly articulated ethos for these 558 schools (and one voice in the CSSC), then surely it is a lot easier to contend against policies which are felt to conflict with that ethos.

So, is the necessity for a single ethos more than identity, more than wanting what the other sectors have; is it actually about, for the first time since the creation of NI, Controlled schools understanding

that a coherent ethos enables them to clearly articulate *why* a certain policy is 'good' or 'bad' for their school?

Could it be argued that you can't enact policy that's contrary to ethos because the ethos won't let you? Ethos therefore is the determinant of policy; it is the rubric for policy; it is the scales on which policy is weighed; it is the checks and balances against which policy is *allowed* to occur and, for policy to occur, it has to pass through the ethos. In essence, if there is no ethos, policy can run amok unchecked; therefore the importance of ethos – and its ultimate interconnection with policy – is not just that it can be viewed and understood through the lens of policy, but that, at the same time, it creates the conditions within which policy can be implemented: it is the *filter* through which policy must pass for it to be congruent with the ethos.

Ethos as the filter for policy
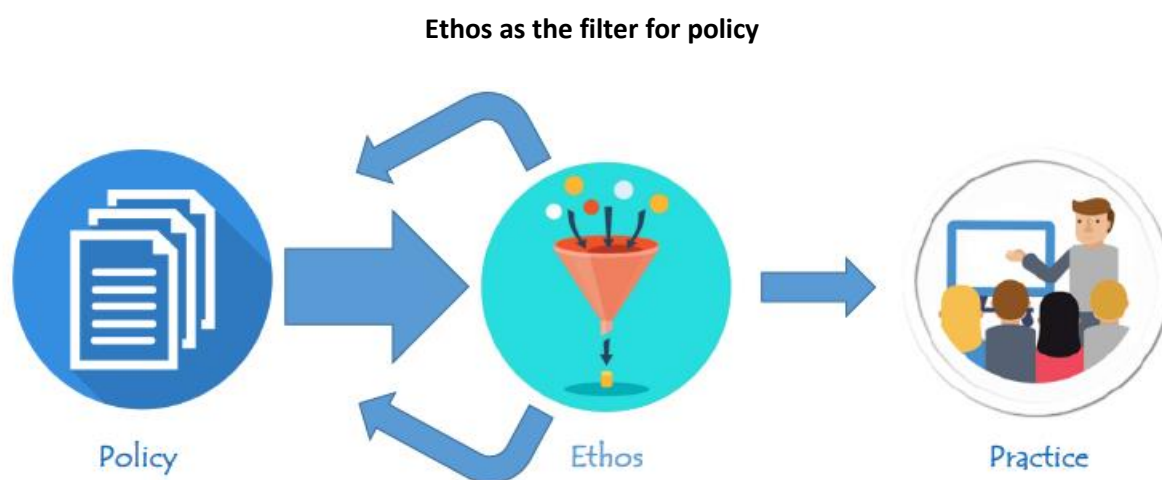
Figure 2: An infographic representing ethos as the filter between policy and practice

The research would suggest that the respondents did not grasp this concept to the same extent as the participants, with responses to q36 putting '*a benchmark against which to judge whether policy is compatible or incompatible with the sector*' as the least popular choice for what a single ethos might bring to schools. The participants, however, saw that ethos can give confidence to leadership in how to interpret, translate and enact policy and that it is easier to formulate policy when cognisance is taken of ethos.

It was therefore interesting that there was such a variety of positions by the Principal participants regarding a 'hierarchy' between the two, with half of them talking of an ethos-basis upon which policy sits. However, despite their philosophical views on strata, there was a feeling that the real situation in N. Ireland is that policy doesn't take account of ethos and that principals do not feel empowered to use ethos to, "justify not implementing the policy" (PrimP1).

Could it be argued that these positions and the views of the respondents to q36 are a consequence of a sector which has had little or no experience of a collective ethos, and it is therefore difficult to conceptualise how policy could be subject to and filtered by it? It would be interesting to see whether participants from the Maintained or Integrated sectors agreed with their views. Perhaps they would, or perhaps they would agree with GramP that, if a school (and a sector) is secure in its ethos, then policies, which come and go, are of little consequence as these institutions will continue to function with an eye to that ethos, regardless of what any policy dictates.

Conclusions

It is acknowledged that this research, by design, has been quite broad. However, it is argued that, in light of the recent introduction of CSSC and its current work on ethos development, it is timely, relevant and impactful. In addition to all of the strands of it being interconnected, it has in itself brought to light a series of gaps, connections and interconnections.

These gaps have become apparent between: the intended versus the reality, both in relation to ethos and policy; the ethos of the Controlled Sector and its schools; an understanding of what the churches do in the sector as opposed to individual schools; the desire to have an overarching, collective ethos and for schools to retain their own; and the gap or vacuum of ethos-leadership.

Connections have also become clear between: ethos and policy; ethos and other terms; churches and educational policy; churches and schools; and faith and education. These have led to the identification of some interconnectors: ethos and the 8 interconnectors; RE as the interconnector between the churches, policy and individual schools; values as the interconnector between ethos, policy and schools; and ethos as the interconnector between policy and practice.

Whilst the research attempted to reach as broad a consensus as possible by interviewing 8 principals across the 5 phases and 8 key policy actors, and taking on board the responses of a quarter of the 558 schools within the CS, it is acknowledged those who assisted in the work are individuals with their individual opinions, backgrounds and worldviews. It is, "difficult not to influence and be influenced by the research participants" (Jootun et al, 2009, p45) and, despite the hope that they would represent the views of their respective 'constituencies', it would be naïve to assume that this always happened, especially as a commitment to reflexivity recognises that, "any finding is the product of the researcher's interpretation" (p45).

> During the research process, we often find ourselves ruminating on the ways in which our own aspirations, characters, values, philosophies, experiences, belief systems, political commitments, and social identities have shaped the research. We also ponder about how the research may have touched, affected and possibly transformed us, as professionals, as researchers and as persons.
>
> (Palangas et al, 2017, p430)

The conclusions and recommendations below, presented under the Research Questions posed in the introductory chapter, are however an attempt at a faithful summary of these views and an extrapolation of them as being the views of the organisations and phases represented.

1. The 'what': **What is ethos and how does it pertain to the Controlled Sector?**

What is ethos?

There is no doubt that ethos is a difficult concept to pin down and it is a continuing lack of a clear identification which makes it so difficult to understand and isolate. Although it is closely linked to character, and was originally used to describe the trustworthiness of a speaker, character is more about the individual, whereas contemporary understanding of ethos relates to the collective.

What is clear is that it is about the context in which it is set; the history, geography, belief system, people and relationships. It is the frame within which organisations exist and act, suggesting who they

are, what they stand for, where they are going and how they expect to get there. Ethos is dependent on clear leadership, trust, and a sense of shared understanding, values, responsibility and ownership. Simultaneously it shapes and is shaped by those with whom it connects, and simultaneously it shapes, challenges, encapsulates and articulates values.

It is all very well to suggest that you know it when you see it, it is part of how we are, or it is what makes us tick, but this brings no closer a clear definition within an organisation or an educational system. What is needed, therefore, is a more accurate way of looking at all of the elements which surround ethos to see if they can identify this nebulous concept – an *ethos test*.

This research contends that such a test is possible by using 8 *interconnectors*, which are the most commonly used terms associated with, confused with, or substituted for ethos: culture; climate; environment; atmosphere; identity; mission; spirit; and values. In acknowledging that ethos is found in the gap between a formal articulation of it and a lived experience, the research suggests that this gap narrows down a possible definition, but is still quite a broad concept. The research therefore proposes that, within this space, the identification of the attributes of the 8 interconnectors will bring a much sharper focus to ethos and aid in an identification of it.

So, ethos exists in the space between what is formally articulated and what actually happens. The formal frames it and the lived defines it. The lived is the domain of the 8 interconnectors, at the *intersection* of which a much clearer definition of ethos is possible.

What are the qualities and attributes of the Controlled Sector?

Whilst Controlled *schools* are generally happy, productive institutions, which are highly regarded in the community, the Controlled Sector is a broad, diverse amalgam of these individual schools which has felt unsupported, leader-less and voice-less, resulting in a lack of clear, coordinated direction. This has led to a lack of trust in educational authorities and a sense of isolation from each other, especially inter-phase, with a degree of 'battening-down-the-hatches' to protect their individual interests.

It is a sector of ambiguities, neither secular, nor Protestant; Christian, yet open to all faiths and none. It appears to be defined by what it does not have, rather than what it does, looking at its closest comparators with envy over their representation, advocacy, funding, leadership, quality control and overt acknowledgement of a faith basis. Whilst each school is at the centre of the community, there is a sense that each sees itself as the centre of the universe, with no sense of community between them.

What is the current ethos of the Controlled Sector?

There is little doubt that the Controlled Sector is fragmented, yet has an ethos, albeit one which is contested, unarticulated and diluted from its historical roots. What ethos exists has been created in and by an ethos-leadership vacuum, largely being an amalgam of the ethoi of its constituent schools – with the degree of a Christian basis dependant on each school's individual relationship with the local Protestant churches - but devoid of any formal frame.

Applying the ethos test, the research concluded that the current ethos of the Controlled Sector is *unrepresented, disconnected, distrusting, under-appreciated and frustrated. It is made up of individual*

entities, which feel isolated and unconnected and, although it is historically linked to Christian values yet open to all, it is unable, unwilling and uncertain in articulating what it does and what it stands for.

2. The 'who': **Who influences the ethos of the Controlled Sector?**

Is the CSSC a necessary step for the Controlled Sector?

Within a context of distrust, frustration and impatience with the educational authorities, and inequity with the Maintained and Integrated sectors, the establishment of the CSSC has been long-awaited, hard-fought and warmly-welcomed. Whilst it has much to do to prove itself and needs to ensure that its status is defined, already it is winning the trust of the sector, through an elected Council, highly regarded and experienced staff, effective communications and opportunities for cross-phase events.

Whatever concerns there might be over the introduction of another educational body in financially constrained times seem to be over-looked in the desire for an organisation to unite, unify, represent, advocate and articulate. Schools quite clearly want an organisation to speak on their behalf and see the CSSC as a credible and trustworthy vehicle for this.

Whose values are being espoused in the CSSC's Vision Statement?

Despite assurances and evidence of some consultation, it seems clear that the Vision Statement was based upon the values of (and written by a representative of) the Protestant churches. Yet it would appear that these values are not at variance with the majority views within the sector and so it must be concluded that they reflect what the sector believes itself to stand for.

What is the ongoing role of the Protestant Churches in the Controlled Sector?

Whilst there is an awareness of the role of Protestant churches in the governance of the CS, there is a lack of understanding of their historical involvement and their wider policy contribution. This is compounded by an often ineffective selection of Transferor governors, many of whom lack an understanding of their representative role and some of whom do not possess the strategic skills for board membership. The churches need to understand that this is a key area in their influence of the sector and be more strategic in approaching it.

The relationship between individual schools and local churches is valued and, in the phases in which the churches have historical rights of representation, a greater connection would be welcomed. There is a clear link between the extent of the churches' connection and their influence over a Christian ethos within a school, which translates into different degrees of this ethos being manifested in the five main phases of the sector. One area of interconnection between the churches, schools and the sector is in the area of RE, in which the churches have rights over the policy direction and the delivery. However, the churches must ensure that the curriculum is fit for purpose in a more diverse society, that the subject is afforded equal status with others, and that teachers are supported to understand and deliver it effectively.

With a more secular society and the emergence of newer denominations and expressions of individual faith, the Protestant churches need to 'step up to the mark' if they are to continue to make any real

impact upon and have influence over Controlled schools. This should be done by a higher public profile within the policy-making arena and a greater attention to practical support at school level.

3. The 'why': **Why might a single ethos be of importance?**

Why a single Controlled Sector ethos is or is not important

The importance of a single ethos is in providing unity and coherence, and in articulating the collective values, mission and identity of the sector. A single ethos can act as a filter through which policy can pass in order for it to be interpreted, translated and enacted in accordance with the ethos of the sector.

Such an ethos needs to be embraced by Controlled schools, who will resist any imposition of it upon them. A single ethos needs breadth and an acknowledgement of context; whilst it may define the sector, it may not necessarily define its schools.

Why the Vision Statement is or is not an appropriate basis for a single Controlled Sector ethos

Despite a certain blandness of language and a potential for confusion or misinterpretation, the Vision Statement is a clear and coherent statement of intent. Its use will provide confidence in articulating what many Controlled schools are already doing and clarification that this is what all of them should be doing. Its existence will negate the lack of ethos-leadership and consequent vacuum, ensuring that a more clearly defined ethos for the sector is in evidence.

In applying the ethos test, the acceptance and adoption of the Vision Statement, and the introduction of the CSSC, has the potential to lead to a different ethos for the sector in comparison to that which it is suggested currently exists. A new ethos might suggest that the Controlled Sector is *represented, connected, trusting and supported. It is made up of individual yet connected entities, is open to all, clearly articulates its Christian foundations and celebrates what it does*.

At school level, it will impact in two ways: firstly, as a tool to open discussions about what it means to be part of the collective of Controlled schools, it will change individual ethoi to a certain degree; secondly, however, it will not change them all to the *same degree*, as the 8 interconnectors of each individual ethos will be different in each school.

How might schools receive, translate, interpret and enact the Vision Statement?

Schools are happy to accept the Vision Statement as an over-arching statement of the ethos of the sector, but wish it to be an umbrella under which their own individual ethos will sit. Schools will either use it as a stand-alone to supplement their own ethos, incorporate it into their own ethos, or contextualise it to fit their own ethos.

What are the social justice implications of the Vision Statement?

Whilst a Christian faith may not be as important for today's society, the values it promotes are. For those who share that faith, it is difficult to separate it from education, whereas for those who do not, it is not. However, those who espouse no faith for themselves acknowledge the benefits to their

children in being educated within the context of faith values, especially when those values compare favourably with those of society.

The importance of the Vision Statement in this regard is that it is transparent. Whereas a Christian ethos may have been *assumed* in the past, parents really had no comprehension of what they were 'buying into'; now, like the Maintained and Integrated sectors, there is the potential for parents to understand where the sector stands on this issue. So long as the values espoused are inclusive, tolerant and respectful of difference and leave room to communicate, explore and celebrate other worldviews, it is difficult to see how they might offend.

4. What is the connection between ethos and policy?

Policy and ethos are primarily about people; their reactions and relationships; their communities, contexts and communication. The connection is also seen through the fact that ethos creates the environment in which policy can be put into coherent practice, through discussion, consensus, negotiation and compromise, understanding that both policy and ethos should form the overarching framework, leaving room for the realities of real-world situations. Interconnected by values, policy is interpreted through, and impacted and influenced by ethos. Ethos is therefore the filter between policy and practice, through which policy must pass in order for it to be enacted.

Conclusion

This research contributes to the body of knowledge by proposing a new conceptualisation of how ethos can be identified. Ethos is nebulous, but can be less so if isolated at the intersection of culture, climate, environment, atmosphere, identity, mission, spirit and values, and by proposing an ethos test which can lead to a clearer ethos picture, even in fragmented organisations or systems such as NI's Controlled education sector. In attempting to define the sector and its ethos, the study has also added to an under-explored area of research in the N. Ireland education system and will therefore be of benefit to the academic community, but also to those immediately invested in the work of schools: the politicians, policy-makers and stakeholders who create, enforce, influence and contribute to the direction of education; the governors, principals and teachers who translate this into reality through their daily work; the parents who entrust their children to care of these professionals; and the pupils, who are the direct recipients of the system.

In addition to a lack of collective representation, support and leadership, which is being redressed by the introduction of the CSSC, the Controlled Sector has suffered from an undefined ethos. It has therefore been unable to articulate what it is, what it stands for, where it wants to go and how it can do this. It is hoped therefore that the work on ethos remitted to CSSC and, in particular, its Vision Statement, will form the firm basis upon which the sector can stand and the banner under which it can unite.

If schools embrace it and the idea of a single ethos, it is hoped that they will see its value, not just in giving a collective sense of values, mission and identity, but in creating a collective filter through which policy must pass. Ethos is more than a statement or a framework for operation; it is the articulation, expression and manifestation of **who** we are, **what** we do, **how** we do it and **why** we do it in a certain way. It is the key which unlocks an understanding of us at the same time as it is the gateway which that key fits and through which must pass anyone or anything which might hope to influence us or what we do.

Influence is power and control, and if ethos is the gateway, then those who influence the ethos - the *gate-keepers* - wield tremendous power, because whoever influences the ethos controls the ethos, and whoever controls the ethos controls the policy, controls the schools, and ultimately controls the education system in N. Ireland.

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