METHODOLOGICAL CHALLENGES

DELIVERING AND EVALUATING INTERVENTIONS IN WAR-AFFECTED, LOW-INCOME COUNTRIES

THEORIES OF CHANGE AND THEIR APPLICATION IN POLICY AND PRACTICE

FEATURING
CHRISTINE SÅLZER
JOHN JERRIM
JOHN MCMULLEN
MELANIE NIND
NICK TILLEY
PAUL E. NEWTON
SIOBHAN MCALISTER
How to guide

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Since I last wrote, BERA has responded to two major consultations: the HEFCE consultation on the REF; and the consultation initiated by Justine Greening on Primary Assessment in England. These have provided different opportunities to contribute to public debate.

THE HEFCE CONSULTATION ON THE REF

BERA commissioned Andrew Pollard, Chair of the Education sub-panel in the last REF exercise, to take the lead in drafting our response, working alongside Professor David James and myself. The depth of knowledge and expertise that Andrew has accrued in previous REF cycles was a considerable asset and allowed us to tackle a number of highly technical questions in depth. To refine the draft, we consulted members of the last REF Education sub-panel. We benefitted from some shared thinking with other Learned Societies, most notably at an event organised by the British Academy where Lord Stern spoke. We think our detailed responses make a robust submission. (See the report at: https://www.bera.ac.uk/news/beras-response-to-the-hefce-consultation-on-the-next-ref). We await the outcome of the review with interest.

CONSULTATION ON PRIMARY ASSESSMENT IN ENGLAND

The recently published Parliamentary Education Committee report on Primary Assessment reflected the concerns voiced by many BERA members that the current approach to assessment in English schools is deeply flawed. The report recommended that any baseline measures “should be designed as a diagnostic tool to help teachers identify pupils’ needs and must avoid shifting negative consequences of high stakes accountability to early years.” (Education Committee, 2017, p3). BERA’s response to the DfE consultation on Primary Assessment is in line with this view and benefitted from research evidence that members can bring to bear on this topic (see, for instance, Leckie & Goldstein, 2017; Moss, 2017). By working with other interested parties in the More Than a Score campaign (https://morethanascore.co.uk/) we hope to ensure that English primary schools will have an assessment system that is fit for purpose.

IN OTHER NEWS

BERA has continued to build strong links with other associations and learned societies. In line with BERA policy, we sent symposia to both AERA and EARLI. Several BERA members are involved in the Royal Society–British Academy joint project on educational research. The project team are running a series of roundtables and focus groups on the challenges and opportunities for educational research in the UK which we hope many of our members will attend. Interim findings will be reported to Conference in September. Our membership of EERA brings many benefits, including free access to the European Educational Research Journal. I would particularly encourage early career researchers to take a look at the programme of Season Schools that EERA run over the summer http://www.eera-ecer.de/season-schools/. This is a very good way of developing new networks and getting a rounded view of the European dimension to education research. Our participation in EERA Council ensures we maintain strong ties to the education research community in Europe. Post-Brexit this will become increasingly important.

Professor Gemma Moss
University of Bristol

REFERENCES

New Members of Council

BERA Council elections took place earlier in the year. From a strong field, four candidates were elected. They will take up their roles in September. Many congratulations to the following new members of Council:

**Mhairi Beaton**
Mhairi Beaton is at the School of Education at the University of Aberdeen. Prior to this she was a primary school teacher in Highland Region in Scotland and completed her M.Ed as a part-time, distance student whilst still working as a classroom practitioner. She has since completed her Ph.D. Her research interests explore the ways in which we can enhance the participation of young people in their learning. She is interested in inclusion, inclusive practice and inclusive pedagogy and is particularly interested in how pupil voice can be utilised to promote pupils’ ownership and involvement of their own learning. She is a Convenor of the Inclusive Education SIG and has sat on BERA Conference Committee for the past three years.

**Erica Joslyn**
Erica Joslyn is Head of Department for Children, Young People and Education at the University of Suffolk. She has worked in higher education since 1990. Erica is a Principal Fellow of the Higher Education Academy and has extensive experience in curriculum leadership and academic management. Her academic and research interests are in the areas of resilience, social emotional competence and education for children and young people. She is one of the Convenors of the Race and Ethnicity SIG.

**Gabrielle Ivinson**
Gabrielle Ivinson is Professor of Education and Community at Manchester Metropolitan University. She works with artists to co-produce art forms and artefacts to enable young people to communicate with persons in authority by drawing on the affective power of art to move. She has been developing creative methodologies whilst working in post-industrial places with a history of dangerous, skilled manual labour supported by women’s domestic labour. She is concerned that children and young people living in poverty are still having difficulties achieving in school.

**John Leach**
John Leach is Pro Vice-Chancellor for Academic Staffing and Equalities and Dean of the Faculty of Development and Society at Sheffield Hallam University. He was appointed to his first Chair on 1 January 2000, and has previously held senior appointments at the University of Leeds and the University of Hull. John completed both his first degree in pharmacology and his PGCE in chemistry and science at the University of Bristol. He later obtained a PhD in science education from the University of Leeds. A qualified teacher, John’s academic background is in science education and he has published a number of books and scholarly pieces in this area.
BERA/SAGE Impact Award
Baseline Assessment and the Temporary Nature of Policy Impact in a Data-Obsessed System

By Alice Bradbury and Guy Roberts-Holmes,
UCL Institute of Education

Last autumn at the BERA Conference we were delighted to be awarded the BERA/SAGE Impact award for our research on Baseline Assessment in Reception classrooms, which led, at least in part, to the abandonment of this policy by the Government. This award was particularly welcome as it is rare that work in critical policy studies and primary and early years education has such a direct impact on policy. In this case, the impact was enabled by joint working with the teachers’ unions who funded the project, conducting the research at the right moment as the policy was introduced.

Our research, based on a nationwide survey and in-depth interviews with teachers and school leaders at five primary schools, found several problems with Baseline Assessment. Above all, teachers objected to the idea that children could be accurately assessed and labelled at age four/five, and then carry this label and its implied prediction of their attainment through primary education. As one teacher commented, ‘they are children and they are not robots, not machines’. There were also significant questions about the accuracy of the assessment and its pedagogical appropriateness. Some children were not ‘settled’ in Reception and would not participate, while teachers found children’s scores varied when they were tired or hungry. More significantly, children with English as an additional language were not able to do the assessment in another language (unlike the existing early years Baseline Assessment and the Temporary Nature of Policy Impact in a Data-Obsessed System). Teachers described being told to keep results low so that the school is more attractive (Bradbury & Roberts-Holmes, 2015) and where teachers described being told to keep results low so that the ‘Ofsted story’ of attainment as children go up the school is more attractive (Bradbury & Roberts-Holmes, 2016). In our Baseline project, headteachers attempted to ‘limit the damage’ and felt constantly criticised. Within a data-obsessed system, Baseline was ‘yet another stick with which to beat schools’.

Perhaps then it is not surprising that the Conservative Government has proposed a return to using a baseline assessment to measure progress, in a move symptomatic of datafication. We hope policy-makers will again review the research and consider the concerns raised, particularly for marginalised groups. In the meantime, our research into this evolving policy landscape continues, currently with a project exploring the use of ‘ability’ grouping in early years and Key Stage 1, and the links to the return to selective education.

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+ Roberts-Holmes, G. (2015) The ‘datafication’ of early years pedagogy: ‘if the teaching is good, the data should be good and if there’s bad teaching, there is bad data’. Journal of Education Policy, 30 (3), 302-315. DOI:10.1080/02602939.2014.924561.
Many congratulations to all our winners.

Keep an eye on the BERA Blog and the autumn issue of Research Intelligence for summaries of their research.

**BERA 2017 Award Winners**

**BJET Fellowship Award 2017**

BERA and the BJET Editorial Team are delighted to announce the BJET Fellowship 2017 has been awarded to Dr Alison Clark-Wilson (UCL Knowledge Lab) for her research proposal: *How do secondary mathematics departments scale their use of dynamic technologies within key stage 3 mathematics? – A situated view of teachers’ growth in knowledge and practice.*

**BERA 2017 Masters Dissertation Award**

The 2017 Winner of the BERA Masters Dissertation Award is Jonathan S. James (UCL Institute of Education) for his dissertation: *Civil disorder, domestic terrorism and education policy.*

The abstract for his dissertation is below: “This dissertation seeks to identify the ways in which occurrences of Islamic terrorism and outbreaks of civil disorder have impacted on approaches to migrant incorporation and education policy in England and France. Since 2001, England and France have experienced outbreaks of rioting in which young people of immigrant origin have been implicated. Both have also been the target of Islamic terrorist attacks committed by their own citizens. The two countries have had similar experiences of immigration since the Second World War, but are considered to have taken divergent approaches to migrant incorporation. Whilst Britain has tended towards a ‘multicultural race relations’ model, France has tended towards an assimilationist Republican model. Through the analysis of policy discourse, policy documents and secondary sources, this dissertation seeks to establish whether, given the common challenges faced by the two countries, these distinct approaches to migrant incorporation have been maintained. It finds that the policy traditions continue to frame political discourse and feed into the policy response. At the same time, commonalities in the challenges faced, as well as processes at super-national level, appear to have led to convergence in some areas.”

**BERA 2017 Doctoral Thesis Award**

The 2017 Winner of the BERA Doctoral Thesis Award is Sophina Choudry (University of Manchester) for her dissertation: *Mathematics Capital in the Classroom and Wider Educational Field: Intersections of Ethnicity, Gender and Social Class.*

The abstract for her thesis is below: “The problem addressed by this thesis is manifold: (a) how to model the ‘found’ relationships between intersecting categorical variables and academic mathematics attainment, and how these affect policy (for example, on ethnicity and EAL); (b) theorising these models in relation to Bourdieu’s theory of practice and capital, especially, in classrooms and peer groups; and (c) negotiating the meaning of students’ social backgrounds (i.e. interactions of ethnic, gender and social class) in school and classroom policy discourses and practices and so the relation between students’ backgrounds and relationships with mathematics in classrooms.”

Many congratulations to all our winners. Keep an eye on the BERA Blog and the autumn issue of Research Intelligence for summaries of their research.
Methodological Challenges in Education(al) Research

By Gemma Moss, University College London

The articles that feature in this Special Issue of Research Intelligence have their origins in the BERA President’s Roundtable seminar series 2015-17. (See https://www.bera.ac.uk/project/bera-presidential-seminar-series-2015-17-methodological-challenges-in-educational-research.) The roundtables were designed to open up discussion amongst participants about shared methodological concerns. They focused on: the dilemmas faced when researching in situations of conflict; applying theories of change to education; assessment data and their uses in policy and practice; the challenges of working on large-scale international education studies; and researching pedagogy.

By reflecting on particular dilemmas and their potential resolution, each article maps out for the reader how (and in some cases, why) the horizon to a particular line of enquiry is developing as it is. Authors record some of the key tension points that arise in a body of work committed to using these research tools, in these ways, for these purposes. It is the quality of the reflection that counts. As an ethnographer who began working wholly within a qualitative research tradition, I have found it increasingly useful over the length of my research career to “ethnograph” how other researchers go about their business, even if they work from very different starting assumptions and procedures than my own. Understanding the logic to different domains of enquiry has helped me develop as a researcher. Indeed, it is a necessary ingredient for working successfully in interdisciplinary or mixed methods teams, as I often now do.

In this Special Issue, John McMullen identifies some of the key challenges in researching in conflict-affected areas. He points out that this can mean too little research is being carried out where the need is greatest. By passing on the lessons he has learned, he hopes others will benefit.

Siobhan McAllister highlights some of the ethical challenges raised by undertaking research into young people’s experiences of sectarian violence and intimidation. Researchers must weigh the real risks that participants face in speaking openly about their experiences against the benefits to be gained from honest reflection on such important issues.

Nick Tilley considers how and why theories of change have become a key means of articulating and testing interventions designed to make a difference through policy and in practice. He highlights some of the unintended consequences of pursuing “what works” under conditions of complexity, drawing on a body of research that provides ways of testing assumptions built into programme theories.

Paul Newton sets out some of the conflicting purposes and “convoluted network of constraints” that influence assessment design. He argues that assessment isn’t an exact science that can produce reliable and valid results regardless. Rather its fitness for purpose depends upon necessary compromises hammered out between interested parties. It is an open question whether current arrangements in the UK facilitate this.

John Jerrim outlines some of the many reasons for taking care when interpreting statistical data in the public domain. He takes us behind the black box of PISA 2015 to reveal the underlying architecture that produces the results. Vietnam provides a salutary case and a cautionary tale against simply taking at face value what the headlines appear to say.

Christine Sälzer draws attention to the role of the National Programme Management team in handling the methodological challenges that PISA poses when collecting data from individual countries whose education systems are organisationally distinct. She argues that more transparent dialogue between the locally-based team and the central administration can only strengthen the relevance and the quality of the study.

Melanie Nind explores why there is so little research into the challenges involved in teaching and learning research methods. Could more explicit reflection on this dimension to our work help build a stronger research methods pedagogy going forward, that would enrich the field?

I hope these articles will encourage conversation within the field about the methodological challenges that research generates. If we fully understand the strengths and the limitations associated with whatever tools we adopt and can talk about them openly and honestly, we all gain.

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I hope these articles will encourage conversation within the field about the methodological challenges that research generates. If we fully understand the strengths and the limitations associated with whatever tools we adopt and can talk about them openly and honestly, we all gain.
This article considers the methodological and ethical challenges that arise from working in conflict-affected areas such as northern Uganda and the Democratic Republic of Congo (DRC). These threatened to ground our projects even before they began. Interwoven with the personal challenges of finance, transport, language, health, time pressure and security, they could be enough to cancel the plane ticket ahead of navigating risk assessment procedures and ethics panels.

Yet in low and middle-income countries (LAMIC), especially those affected by war, such obstacles have resulted in a lack of evidence of the effectiveness of programmes designed to be implemented there. The places in greatest need of evidence-based support are often the places with the poorest resources and the fewest trained professionals. Nowhere is this more stark than in the DRC, where more than 5 million people have died in an on-going conflict and millions more lack basic needs such as food, security and education. In this context, methodological rigour is not often top of the priority list.

We have spent some time reflecting on our success and failures, having learned much more from the latter. We communicate these where possible at events (such as the recent BERA President’s roundtable in Belfast) in order to encourage other practitioners and researchers to consider contributing some of their professional knowledge and experience to places that need it the most. To that end, I’d like to share, in brief, five of the many lessons we have learned through conducting research in war-affected LAMICs.

1. **IT IS IMPORTANT**
Systematic reviews have shown gaps in research with children in war-affected countries in almost every conceivable area including: the evaluation of psychosocial and educational interventions; cultural understanding in research methods; reliable and valid outcome measures in non-Western cultures; longitudinal studies; child protection; and capacity building in regard to delivering and evaluating interventions.

The structure and location of interventions are often determined by economic considerations rather than carefully composed and rigorously evaluated research studies. This may leave practitioners unclear as to whether a particular intervention actually works or not. If there is no real effect it could be a long-term waste of valuable funds, or worse, actually causing more harm than good (see lesson 3).

2. **IT CAN BE DONE**
The first studies we completed in the DRC were published in high impact international journals. To our knowledge these were the first group-based psychological interventions to be developed for former child soldiers (McMullen et al, 2013) and for war-affected, sexually-exploited girls (O’Callaghan et al, 2014) which were evaluated in Randomised Controlled Trials (RCTs). We employed an RCT design based on CONSORT guidelines to evaluate a culturally appropriate intervention that we had designed and trained local facilitators to deliver. Key systematic reviews have ranked this work as ‘high quality’ (Betancourt et al, 2013) and ‘of major importance’ (Jordans et al, 2016). The intervention drew upon our previous experience in Africa, our training and local expertise. Translation of the manual and training of local facilitators.
have helped to form a sustainable and replicable intervention that continues to be delivered to war-affected young people in the DRC.

I state this not to blow our own trumpet but with clear memories of trying to work out how to play the trumpet as we went along. We were doctoral students with sufficient training and plenty of Africa experience but no previous involvement with RCTs. We had no research funding and relied entirely on the remnants of student bursaries and the generosity of our family and friends. If we could do it, anybody could! What was lacking in experience was replaced by enthusiasm, positivity and the knowledge that we needed more experienced people around us, which was the next most important lesson...

3. PARTNERSHIPS ARE KEY

There is an African proverb that says “If you want to go fast, go alone. If you want to go far, go together”. We did not have a choice anyway but found it much more enjoyable and productive to surround ourselves with a great team at home and in the field. In the projects described above we found support from more than 10 organisations including academics from Queen’s University, Belfast (QUB), Medical University of South Carolina (MUSC), Harvard School of Public Health (HSPH) and various local and international charities. Most importantly, in all our projects, we have included local people as advisors, partners, facilitators and researchers. ‘Capacity building’, ‘training the trainer’, call it what you like, I believe this is the most important contribution we can make in a LAMIC setting. This is impossible without involving local people in decision-making roles.

Every culture has its own constructs and understanding that cannot be fully understood from outside. As Wessells (2009) states, “a key for psychologists in international humanitarian work, then, is to avoid the arrogance of power and make humility and learning from local people central parts of their practice.”

Working with local facilitators not only increased security and helped with logistics and daily stresses, it also allowed us to adapt the interventions so they were more culturally appropriate and sensitive. Combined expertise improved the rigour of the methodology and the skill of the intervention delivery, as well as providing accurate translation of the measures and the intervention manual.

Working with large groups does not come without its challenges. We had a duty of care to our team in the midst of the horrific stories they were hearing from the war-affected children we were working with. My experience has also been that
my African friends do not often see the need to be in a frantic, impatient state as we often are in the UK. When displaying these shortcomings, I am often informed with a smile “TIA, John, TIA!” (This is Africa).

As the proverb suggests, it is often much slower to bring people along with you. However, interventions, no matter how well researched, could not be effective, sustainable and replicable without partnership.

4. PRIMUM NON NOCERE
The first priority and primary tenet of any intervention or research in a LAMIC should be ‘first do no harm’. Again this is entwined with the cultural appropriateness and sensitivity of the project.

Michael Wessells (2009) wrote an excellent piece that has served us well in self-reflection and planning. He considers how ‘Western helpers’ can unintentionally cause harm through ‘parachuting’ in to a particular context where they have no previous involvement or relationships; raising expectations beyond what is achievable; providing contextually inappropriate interventions; not obtaining genuine informed consent; excessive targeting which can cause stigma and resentment; creating dependency rather than capacity and a sense of victimhood rather than empowerment.

As Wessells advises, we have found that it is vital not to bury our heads in the sand believing that we would never cause harm, but instead to be constantly reflecting on the potential for our presence and actions to have unintended negative consequences. Being critically self-aware is important on the ground, while harm can also be avoided through comprehensive planning, strict ethical standards, risk assessment and ultimately by rigorous evaluation of outcomes.

5. MAKE USE OF SCHOOLS
At home and abroad, schools are the main establishment in the community where children can be reached. For children in a post-conflict environment, their lives can be significantly normalised by going to school. It provides a secure environment with a predictable routine, clear expectations and consistent rules. It is also a place where children can begin to re-connect with others again and develop positive relationships that are essential to development. School-based intervention and research can help to reduce stigma and reach out to individuals who would not otherwise access support. It also provides opportunities to intervene within the school setting itself, with peers and teachers as well as with parents and guardians.

We are under no illusions that the need is great and often the work feels like a drop in the ocean. Despite the scale of the challenge, we have found it both possible to demonstrate significance and effect in methodologically rigorous studies. However, it is the human stories that provide hope and perseverance. Testimonies of positive change in children and their families impart a strong belief that young people are often resilient despite the most terrible experiences and, with appropriate support, can move forward and make a positive contribution to society. As another African proverb states, “If you think you’re too small to make a difference, you haven’t spent the night with a mosquito.”

REFERENCES
Northern Ireland is emerging from more than 30 years of civil conflict. The bombings and shootings that once dominated local and national news are to all intents and purposes a thing of the past. Yet ‘paramilitary style’ regulation, control and punishment remain endemic in some communities, whereby anti-social and criminal behaviour is policed ‘informally’. This takes the form of intimidation, threats, imposed curfews, physical beatings, shootings and expulsion from communities. Young people, particularly the most marginalised, troubled and unsupported, are disproportionately victimised (McAlister & Carr, 2014). Yet this has been largely absent from the post-conflict discourse of Northern Ireland, and the rights and transitional justice agendas.

In this article, I will consider some of the methodological challenges the Risks, Rights and Justice study (Carr, Dwyer & McAlister) faced in researching this issue, and what it suggests more broadly about the responsibilities of the research community not to remain silent on issues that are difficult to research.

MAINTAINING SILENCE: RISK, VULNERABILITY AND NON-ENGAGEMENT
There is little research on paramilitaries in Northern Ireland, and even less which includes young people. This is at least in part because of the challenges that come with researching sensitive topics with a group often defined as ‘vulnerable’. Lee and Renzetti (1993) note that it is the heightened risk, intimacy and potential consequences of some research that make it particularly sensitive. Sensitive research is that which poses significant risks to all involved (Lee, 1993), and where risk is present at various stages of the research process. Lee (1993: 4) outlines three broad areas in which sensitive research can be ‘threatening’. It can pose an ‘intrusive threat’ through exploring personal and potentially distressing issues; a ‘threat of sanction’ as it is often concerned with topics that might reveal incriminating or stigmatising information; and/or a ‘political threat’ whereby the research delves into areas that can uncover, disrupt or challenge those in positions of power.

Such research is, therefore, by its very nature replete with methodological and ethical challenges. These include, but are not limited to: locating and accessing research participants; managing emotions and listening to ‘uncomfortable truths’; avoiding harm and ensuring the safety of research participants and researchers; handing disclosures and sensitive data; disseminating sensitive research findings. These challenges are particularly pronounced when the research population is deemed ‘vulnerable’. The methodological and emotional difficulties of sensitive research, alongside the protectionist leanings of research ethics committees (Daley, 2015), and the politics of funding, can lead to a lack of academic engagement on what can be pressing social issues. The research community, through not engaging with issues that are difficult to research, can, therefore, be complicit in the silencing of them.

MANAGING RISK TO BREAK SILENCE
The Risks, Rights and Justice research aims to speak to the silence surrounding the existence of paramilitary-style groups in post-ceasefire Northern Ireland. The research encompasses all the threats identified by Lee (1993). It poses an ‘intrusive threat’ in asking young people to share deeply personal, private and distressing experiences of violence and intimidation. There is a potential ‘threat of sanction’ as those who come to the attention of paramilitaries are often involved in illegal or deviant behaviour. There is also a political threat, as focusing on an issue that is coercively silenced (by paramilitaries...
themselves) and silently silenced (by a lack of political engagement) (see Matheisen, 2004), may conflict with ‘the vested interests of [the] powerful ... or the exercise of coercion ... ’ (Lee, 1993: 4). The topic – violence, crime, or essentially child abuse, the location – ‘dangerous communities’, and the research population - young victims, elevate the risks.

Balancing protection – physical and emotional well-being - with participation (Daley, 2015) was a primary concern throughout the project. We wanted to ensure that young people had the opportunity to participate, but that doing so would not adversely affect their well-being. This was particularly important given our understanding of the willingness of less powerful groups to talk. Indeed, while the research population was ‘hard to reach’ by virtue of the hidden nature of their experiences, they were certainly not hard to engage.

A major challenge of the research was that we were essentially asking young people, some of whom were under 18, about their experiences of abuse and thus might have a statutory duty to report any instances of this. This was mitigated through a decision not to access young people who were currently under threat. The parameters of conditional confidentiality were also clearly explained, specifically our obligation to report any child protection issues. A clear expression of conditional confidentiality was also important given the link between offending and ‘informal punishment’, and the need to ensure that young people could not be incriminated through telling their stories or put at risk by speaking about the unspoken. Thus, we asked young people not to use the names of paramilitary organisations or individuals if they did not want us to follow up on this, or to speak of any crimes they had been involved in.

A range of strategies were also put in place to minimise the risk of physical harm or repercussion from involvement in the research. These included:

While the research population was ‘hard to reach’ by virtue of the hidden nature of their experiences, they were certainly not hard to engage.
not advertising the research; using encrypted audio devices; having recordings transcribed and deleted within a few days; having transcription undertaken outside Northern Ireland and a confidentiality agreement in place; removing all identifiers from transcripts and taking care not to identify individuals or communities through the details of reporting.

Further safeguards were implemented to address the risk of emotional harm. One method involved restricting our sample to young people who were linked with an organisation in order that they had support if needed. The politics of access of course meant that this impacted on the nature of the young people with whom we did speak. There is a politics to local organisations in conflict-affected societies, which we must reflect upon in our analysis. Further, the most marginalised may not be connected to organisations. While we could certainly have recruited some of these through snowballing, this was not felt to be a risk-reducing strategy. Thus, we felt this compromise was acceptable in order to undertake the research and bring the issue on to the public record. Its benefit was the availability of immediate support for young people, and the potential impact on the data was in part resolved through sampling from a range of organisations, including those that marginalised young people may have contact with (for example, drug and alcohol services; homeless support).

Managing the potential for distress was, nonetheless, challenging. While increasingly sought by ethics committees, distress protocols are somewhat formulaic and do not deal with the fact that sharing traumatic experiences is distressing. Few young people in this research had previously spoken about their experiences, and deep feelings of injustice resulted in the desire for some, when asked, to share in detail the extent of their injuries and trauma. Speaking of receiving a paramilitary threat\(^1\) when she was 16, after which she felt unable to leave her home for months, Aoife reflected: ‘... nobody was there to listen to me, nobody was there to listen to me tell my story’. Being unable to share their experiences for fear of reprisal or because they felt no-one cared, was common among victims. Thus, listening with care, empathy and respect, and bearing witness to their pain, distress and anger was crucial. While it may be difficult for researchers to bear witness to uncomfortable truths, we have a duty to give legitimacy and voice to them.

**CONCLUSION**

Sensitive research with vulnerable groups brings a range of challenges, and this might account for the relative lack of academic engagement on particular issues. Yet, in not undertaking difficult and challenging research, the research community can be complicit in silencing. Silencing through non-engagement ensures that dominant voices and official discourses remain unchallenged, and the experiences of the less powerful remain invisible. Our experiences demonstrate that such research, while difficult is possible, that ‘hard to reach groups’ can be accessed and the risks and potential dangers of sensitive research managed. Indeed, the research community has a responsibility to undertake difficult and potentially contentious research in order to break silences and engage ‘on behalf of those on the downside of power relations’ (Hudson, 1993, in Hughes, 2011: 320).

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**REFERENCES**


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\(^1\)A threat often involves one or more (sometimes masked and armed) individuals entering a house by force or removing a young person from a public place and warning them that if their behaviour does not change, they will be beaten, shot or exiled. Young people are reminded they are being watched.
Theories of Change and their Application in Policy and Practice

By Nick Tilley, University College London

Theories of change are all the rage in education. This article explains why they are inescapable, what they should look like, why they need to be tested and why decision-makers and researchers alike must recognize the ineluctable complexity of the social. At this length the arguments are only sketched out. See Pawson & Tilley (1997) and later publications by the authors for more detail.

All policies and practices are theories incarnate in the minimal sense that they embody a conjecture that the measures taken will cause the intended change, even if decision-makers are sometimes unclear on how they expect the intended change will be produced.

To garner useful findings, researchers need to articulate and test theories of change that explain how policies and practices of interest produce patterns of outcome. The theories need to a) spell out the steps between the intervention and its intended outcomes; b) specify the key causal mechanisms that the intervention will activate to generate the intended outcomes; c) describe key conditions needed for the intervention to activate those mechanisms; and d) replicate (a-c) for unintended outcomes.

Take something seemingly simple: a burglar alarm. Figure 1 shows four basic pathways that activate different crime-related causal mechanisms: incapacitation, deterrence, disruption and diversion. Each pathway includes only five steps, although these can be further elaborated. For example, incapacitation/prevention could include: burglar alarm installation, burglar entry, alarm activation, public and police awareness of alarm activation, public and police attendance in response to activated alarm, burglar presence at scene when police/public arrive, public/police detention of the burglar, charge leveled at burglar, case preparation for Crown Prosecution, Crown Prosecution service decision to prosecute, guilty verdict, custodial sentence, burglar failure to commit burglaries s/he otherwise would commit if not in prison. The alarm will not produce its effect in the theoretically specified way if the process is aborted at any stage.

Figure 1: Some basic theories of domestic burglar alarms

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install alarm</td>
<td>Offender triggers alarm</td>
</tr>
<tr>
<td>Offender sees alarm</td>
<td>Alarm alerts general public and/or police</td>
</tr>
<tr>
<td>Offender apprehended</td>
<td>Burglary reduced through incapacitation</td>
</tr>
</tbody>
</table>

1. Incapacitation/prevention

| Install alarm | Offender sees alarm |
| Offender perceives increased risk of apprehension | Offender decides not to commit burglary |
| Burglary reduced through deterrence |

2. Deterrence/prevention

| Install alarm | Offender sees alarm |
| Offender perceives increased risk of apprehension | Offender decides not to commit burglary in local area |
| Non-alarmed properties not burgled through disruption |

3. Disruption/diffusion of benefits

| Install alarm | Offender sees alarm |
| Offender perceives increased risk of apprehension | Offender decides not to commit burglary |
| Offender burglars next door property without alarm |

4. Diversion/displacement

The theory so far in Figure 1, however, is far from sufficient. Contextual conditions also need to be specified for each pathway. Broad conditions could, for example, include the following:

- For alarms to incapacitate:
  - Neighbours must respond;
  - Police need to prioritise attending the property;
  - Criminal justice processes must lead to the arrest, prosecution, conviction and incarceration of burglars.
- For alarms to deter:
  - Alarms need to be visible;
  - Offenders must believe that alarms will elicit a response that increases the risk that they will be apprehended;
  - Responsive neighbours need to be within earshot of the alarm.

- For alarms to disrupt:
  - There must be enough alarmed dwellings in the neighbourhood to make it an unpromising hunting ground for opportunities;
  - There must be a sufficient supply of those deemed likely to respond to an alarm that few places in the neighbourhood can be confidently deemed safe to commit burglary;
  - Unpromising areas for burglary must be far enough away from the burglar’s routine activities to make speculative visits not worthwhile.

- For alarms to divert:
  - There must be nearby alternative, unprotected targets for burglary offering similar rewards;
  - The offender must be sufficiently motivated to commit the burglary to look for an alternative target;
  - The offender must be able to adapt to burgle an alternative target when deterred by seeing an alarm.

Enough has been said to indicate what a theory should look like and to bring out some (but by no means all) of the complexity involved in burglar alarms and their influence on changes in burglary patterns. It should be clear that diverse outcomes can be expected from the same measure applied in different contexts and that a useful theory needs to tease these out. Having teased them out, the next stage is to test them. This rarely happens, but is needed for better informed (evidence-attentive) policy and practice.

Let us turn now to a study of burglar alarms and burglary patterns, where we were unable to tease out theory prior to data collection.

Using multiple sweeps of the Crime Survey and England and Wales, we measured retrospectively the marginal difference in risk of burglary from the addition of a burglar alarm to varying suites of other security devices. The sweeps were aggregated for 1992-1996 and 2008-2012. Findings are shown in Figure 2. The vertical axes show by how much the risk of burglary was reduced or increased by the addition of a burglar alarm to the sets of other security devices shown on the horizontal axes. A score of above one on the vertical axis indicates that by that amount risk of burglary was reduced - a score of 2 would indicate that the dwelling was twice as safe. Contrariwise a score of less than one would indicate that the dwelling was half as safe. The difference in the sets of security devices covered in the two sets of suites reflects differences in questions asked across the two sets of sweeps about the security devices fitted. For burgled properties, respondents were asked about security devices in place at the time of the burglary.

The findings were a surprise. They indicated that the net consequence of adding a burglar alarm to other security devices had been to reduce the risk of burglary in 1992-1996 (Figure 2a), but to increase it in 2002-2008 (Figure 2b).

Figure 2: Alarms and domestic burglary with entry, England and Wales

a) Alarms marginal effects 1992-1996

b) Alarms marginal effects 2002-2008

What might explain this curious finding? Here is one hypothesis framed in terms of contexts, mechanisms and outcomes.

- **Time 1:**
  - Burglar alarms are relatively rare (context);
  - Offenders read burglar alarms as a) indicating rich pickings and b) signaling excessive risks from offending (two way mechanisms);
  - Police routinely attend alarms when reported (context);
  - Here the increased risk signal tends to trump the rich pickings signal (mechanisms);
  - The marginal effect of alarms is positive (outcome).

- **Time 2:**
  - Burglar alarms become much more widespread (changed context);
  - Police stop attending routinely, given that 95%-98% of alarms are false (changed context);
  - Risks to offenders fall (changed outcome and context);
  - Perceived rich pickings tend to trump increased perceived risk (changed dominant mechanism);
  - The marginal effect of alarms becomes negative (changed outcome).

The putative explanation brings out an important generic point about social interventions: human beings act intentionally and adapt to interventions changing the conditions for the operation of causal mechanisms. Police adapt their attendance practices as a result of high rates of false alarms. Offenders adapt to change in levels of risk produced by alarms as a result of changed police responses to their activation. If this is right in this case it explains why alarms were effective at one period but not at a later one. Intentionality and mutual adaptation comprise distinctive and unavoidable sources of complexity in social life in general and in particular in the outworking of interventions.

This brief example shows that we cannot escape theory and our theory needs to be attentive to context, mechanism, intended and unintended outcomes and processes of human adaptation. Theory on its own however is not enough. Detailed empirical work is also needed. Only with this can useful new knowledge be created and made available to decision-makers.

**CONCLUSION - SO WHAT FOR EDUCATION?**

It is impractical to articulate and test every implicit theory in education. When things go wrong and when new policies and practices are contemplated, however, articulating and testing theories along the lines indicated here could help avoid costly errors and the unintended production of harms.

Following the kind of agenda suggested in this brief article in education would be challenging. Education is much more complex than domestic burglar alarms! Many organisations are involved. There are long causal chains. There are multiple subgroups. Parents, children and teachers have their own capacities and their own agendas, shaping their responses and adaptations to the policies and practices put in place. One response would be to treat policies and practices as black boxes, to railroad over the noise and heterogeneity involved as they work their way through, and to measure only overall inputs, outputs and outcomes. There is, though, a heavy price to pay in doing so, especially for those who are at the wrong end of unintended consequences.

Policy-makers, practitioners, researchers and members of the “What works?” industry are urged to acknowledge rather than to disregard the realities of complexity, and in doing so to consider adopting the approach outlined here. The framework provides a way for thinking about, monitoring, reviewing and adjusting policy and practice in its varying and changing contexts.

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Assessment design is a highly complex process: driven by a convoluted network of purposes; bound by a convoluted network of constraints. It is rife with dilemmas. Consider, for example, how we might go about designing a construction qualification, to be taught, full-time, in schools and colleges; starting with the question of how to specify required learning outcomes for a qualification like this.

On the one hand, any particular employer is likely to want a student’s qualification result to convey a particular kind of information about that student, for example, that they have acquired sufficient knowledge, skill and judgement to begin practising competently and safely as a carpenter. This might recommend specifying a quite narrow, job-specific, set of learning outcomes. On the other hand, it might be more valuable to the student to acquire a somewhat different kind of expertise, to equip them for a world in which they are likely to have to adopt multiple roles in the construction industry over time, that is, to initiate them into a wider community of practice. This might recommend specifying a broader, less job-specific, set of learning outcomes, with an emphasis upon transferability.

By contrast, a policy-maker might adopt a quite different perspective, wishing to maximise the engagement of students and teachers with the task of teaching and learning. This might recommend a quite different approach to specifying learning outcomes; perhaps one that encouraged choice from a wide variety of optional units, each one targeting particularly interesting content.

The point is that all three of these perspectives (perhaps others too) ought to be considered simultaneously when designing the construction qualification. Sometimes they will recommend similar design decisions. Other times their recommendations may conflict, necessitating debate, prioritisation, and ultimately compromise (see Newton, 2017). In fact, it is even more complicated than this, because it will often be
stated as desirable, or necessary, to achieve a variety of purposes from within each of these perspectives (see Newton, 2007).

Fitness for information-related purposes is judged primarily in relation to validity, which concerns the accuracy and usefulness of assessment results. Because assessment is quintessentially a process of deriving information about individuals from evidence of their behaviour, the information perspective establishes the foundational paradigm within which assessment designers operate. This means that validity is their primary design criterion. Yet, no assessment designer ever sets out to maximize validity for a specific information-related purpose, even when that purpose is highly prioritised. This is not just because there may be tension between the prioritised purpose and other lower-weight information-related purposes, which might still require some kind of accommodation, necessitating some kind of validity trade-off between them. It’s also because there are likely to be additional tensions between information-related purposes and expertise- and engagement-related purposes. The engagement perspective, for instance, might recommend assessment via project work; whereby each student is encouraged to choose their own construction project, with few external controls, and to develop that project in collaboration with a local employer. In principle, this might be entirely compatible with assessing an appropriate set of learning outcomes, derived from a particular information-related purpose. However, in practice, it might be very challenging to assess those learning outcomes accurately enough (via the construction project) with so little control over critical variables, for example the nature and level of demands made by different projects, or the amount of scaffolding provided by different teachers and/or employers.

Yet, the main reason why assessment designers never set out to maximize validity for any particular information-related purpose is because the design process is always bound by a convoluted network of constraints. The most obvious constraint is resource availability; not just the availability of funds to pay for a particular kind of assessment, but also the availability of other resources, for example people who are sufficiently qualified to assess. When multiple-choice knowledge tests carry far greater weight in a qualification than might be expected, given their limited authenticity, it is likely that resource constraints will have figured heavily during the design phase. As a general rule-of-thumb, the more authentic the assessment, the more resource-demanding it is to implement.

Sometimes, the law can erect constraints upon validity. Particular problems arise for vocational qualifications when a certain amount of authenticity needs to be sacrificed for the sake of legal compliance, for example with health and safety legislation. It may, for instance, be unsafe to demonstrate the acquisition of certain construction skills in a school or college environment.

Other constraints, including educational alignment and wider policy alignment, reflect issues of system synergy. It might, for instance, be laid down, as a non-negotiable professional requirement, that teachers ought to be actively involved in assessing their students, implying that our construction qualification ought to involve a certain amount of internal assessment. However, placing too many assessment demands on teachers might conflict with wider policy agendas, such as the requirement not to increase teacher workload unduly.

One of the fundamental constraints during assessment design is moral reputability; the assessment procedure has to be fair. From the information perspective, this involves ensuring validity for individuals from all relevant subgroups. From other perspectives, this

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1We can think of the validity of a particular qualification as the degree to which it is possible to measure what that qualification needs to measure, by implementing its assessment procedure.
includes ensuring that intended impacts accrue to individuals from all relevant subgroups. Assessment design decisions that result in positive engagement impacts for certain subgroups, but negative engagement impacts for other subgroups, might well be challenged.

More generally, a key constraint upon the design of any assessment procedure is that it should not cause harm that could reasonably have been avoided. This is not the same as causing no harm. No assessment procedure produces results that are 100% accurate. So, when decisions are subsequently taken about the minority of students whose results are inaccurate, there is an inevitable risk of harm, for example when an insufficiently competent carpentry student passes their qualification and is given a job. However, to the extent that assessment is necessary, and that assessment error is unavoidable, this risk of harm invites tolerance. Having said that, the more serious the harm potentially arising from inaccurate assessment, the higher the validity requirement for the qualification.

A key design consideration in relation to moral reputability might be termed ‘subversion resistance’. The higher the stakes associated with an assessment procedure – for students, teachers and/or managers – the more likely it is that at least some of those participants will attempt to subvert the system, inappropriately influencing outcomes to be higher than they ought to be. This kind of behaviour may range from unintentional playing-the-system, for example by giving students the benefit of the doubt, to intentional malpractice. Perhaps the most challenging behaviour along this continuum is intentional gaming. This is where no rule is broken, but unfairness occurs all the same. Unfairness is inevitable because those who game will achieve higher outcomes than those who do not for reasons other than higher attainment. This might include gaming tolerances on moderator-assessor mark differences: generally inflating marks for internally-assessed work, but not by so much as to risk those marks being overturned. Or it might include teaching to the test, which is why an important part of subversion resistance, as far as tests are concerned, is thorough construct representation.

Gaming is not only a threat to moral reputability, but also to public credibility. Indeed, even if only a small proportion of participants engage in malpractice or gaming, this can bring the entire system into disrepute, devaluing the currency of assessment results. Where it seems likely that intentional gaming may seriously threaten the reputability and credibility of an assessment procedure, it may need to be redesigned in order to make it more subversion resistant; for instance, by increasing the amount of external assessment within a qualification.

Effective assessment designers aim not to maximise validity for a specific information-related purpose, but to optimise it; that is, to make it as high as possible, whilst accommodating a broad profile of intended purposes and recognising a wide range of operational constraints. In that context, Ofqual, the organisation that I work for, regulates so that qualifications, examinations and assessments in England are sufficiently valid and are trusted. Ultimately, the secret to effective assessment design is the same as the secret to a happy marriage – compromise. And the key to compromise is dialogue: constructive argument – involving teachers, pupils, parents, policymakers, regulators, educational researchers and assessment designers – to ensure that a full range of perspectives is considered before critical design decisions are finalised.

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Why Does Vietnam Do So Well in PISA?

An example of why naïve interpretations of international rankings is such a bad idea

When the PISA 2015 results were released in December last year, Vietnam was one of the countries that stood out as doing remarkably well. In particular, Vietnam was ranked 8th out of all the participating countries in science, with an average score of 525 test points. This was significantly higher than the average score for the United Kingdom (509), which was positioned 15th in the PISA science rankings.

This is not the first time that Vietnam has apparently excelled in PISA, with a strong performance from this country in the last round, conducted in 2012. Indeed, Andreas Schleicher wrote a whole article for the BBC, discussing a variety of reasons for this developing country’s stunning success (http://www.bbc.co.uk/news/business-33047924).

But does Vietnam’s amazing performance in PISA, given that it is still a low-income developing country, mean we should rush to copy what they are doing in their schools (much like what the Department for Education has done in its attempts to copy Shanghai?).

No! Because Vietnam’s PISA results (and the league tables so beloved by policy-makers) are giving us an inflated perspective on how well this country is doing in educating its young people.

To understand why, we first need to recall what the PISA study is trying to do. It is attempting to measure the reading, science and mathematics skills of the in-school population of 15-year-olds across the world once every three years. The key words in the sentence above are the in-school population.
What about young people who are not in school, or have already left the education system completely? Simple – they are excluded from the group PISA is attempting to measure.

To put this problem into context, let’s say PISA was a study of 17-year-olds rather than 15-year-olds. How would the UK do? My guess is pretty well, because many of our lowest-achieving pupils leave the education system at age 16 – and hence would be excluded from the study. Suddenly, the UK would have higher average scores and less educational inequality than many other countries across the world.

This is exactly what happens with the PISA results for Vietnam – according to the OECD’s own figures, only 48.5% of Vietnam’s 15-year-olds are actually included in the PISA study (see Table A2.1 of http://www.oecd-ilibrary.org/education/pisa-2015-results-volume-i/the-pisa-target-population-the-pisa-samples-and-the-definition-of-schools_789264266490-table115-en;jsessionid=jv9amhpv6d2l.x-oecd-live-02). Those that have been excluded (for example, children who have left school early) are likely to be academically weaker than those who have actually been tested. Thus Vietnam’s PISA scores are artificially inflated, making this country’s education system to appear to be much stronger than it really is.

Can we get a handle upon how much impact this is likely to have had? If one digs through the many hundreds of OECD PISA tables, you can find an alternative set of PISA results where it is assumed that, in each country, 15-year-olds who are not included in the study all perform below the national average. The particular results I am interested in here (for example, children who have left school early) are likely to be academically weaker than those who have actually been tested. Thus Vietnam’s PISA scores are artificially inflated, making this country’s education system to appear to be much stronger than it really is.

Vietnam has been circled and, as we can see, is a major outlier. Specifically the ‘real’ performance of Vietnam is probably between 50 to 60 points lower than reported in the headline PISA rankings. In fact, in these alternative results, Vietnam is well behind the UK (the 75th percentile is 566 for the UK versus 519 for Vietnam), with Vietnam now ranked a lowly 47th in these revised rankings (with the UK sitting in 17th position).

It is critical to note that this result is not about an issue with sampling for PISA in Vietnam. Rather it is a limitation with how the study population is being defined. Either way Vietnam serves as an important case study of how hypnotic international rankings like PISA can be – and just how easily they can lead us astray. Much deeper and more considered interpretation of the results (and analysis of the data) is needed for PISA and other international studies to really be useful for education policy-making. At the moment, there continues to be far too much hysteria surrounding what often turns out to be some quite flaky results.

Vietnam serves as an important case study of how hypnotic international rankings like PISA can be.
In this article I will consider some of the methodological challenges that the Programme for International Student Assessment (PISA) poses researchers and suggest some of the ways that researchers can engage critically in its development. Having completed its sixth cycle in 2015, PISA is a well established instrument of educational monitoring and benchmarking. In Germany, a participant since the first round in 2000, the study has evolved to be the most prominent and influential comparative study in the field of education (Sälzer & Prenzel, in press). These days the results published from PISA every three years are expected and received less nervously and with greater routine than they were at first in Germany (Roeder, 2003). However, some specifics of the German educational system and its federal structure have also helped develop a critical perspective on the methodological strengths, limitations and challenges of PISA.

First of all, Germany is still federally structured and consists of 16 federal states (so-called ‘Laender’, plural). These are sovereign in terms of their educational systems. In addition, the PISA national project management (NPM) role has always been assigned to a research institute or a university. This means that scientific experts with relevant research experience conduct the study and are able to enhance it by developing relevant research questions and nationally relevant supplemental studies. Over time, dealing with specific methodological challenges has helped continuously improve the quality of the data yielded by PISA. The five aspects that turned out to be most challenging for the German case included: sampling, data collection, scaling of the data, analysis and interpretation of the data as well as the dissemination of results. Some of the issues raised in the German case are outlined below.

**Sampling**

Due to the federal structure in Germany, the specifics of 16 educational systems have to be considered during the sampling procedure. There is only one secondary school type which is prevalent in all 16 federal states (level I, Gymnasium, academic track) with between one and three more school types present in each state. Furthermore, each federal state has its own privacy regulations which need to be taken into account, as well as data protection agencies who need to approve the PISA instruments before they go into the field. Over time and with the role of the NPM defined as a learning enterprise, PISA managed to deal with such challenges. The researchers were able to improve and correct flaws of earlier cycles, such as omitting school types in some countries, which happened in the first round. The representativeness of the data is now well defined and conscientiously implemented, so that the sampling strategy is a solid foundation for a high-quality data set.

**Data Collection**

Another special feature of the German system is that there still are separate schools for students with special educational needs. At the same time, inclusion is an important goal in education, so some students with special educational needs are attending regular schools and some are attending special schools. Students in special schools usually complete extra, shorter versions of the PISA test while those taught inclusively work on the regular test forms. This means that there are factually two groups of students with special educational needs, according to their way of schooling. This aspect could possibly limit international comparability.
Another issue for data collection that requires attention is the recent change from paper-based to computer-based testing. Germany has to deal with the fact that some of the Laender administer their schools’ computer infrastructure centrally, while others leave it to the schools. In order to prepare and carry out the PISA test, test administrators faced quite a wide range of conditions, dependent on the federal state in which they were located. This limits the standardisation of procedures implemented in PISA and requires a lot of local adaptations. Furthermore, since no in-depth and generic mode-effect study was carried out to accompany the switch from paper-based to computer-based assessment, a number of open questions with regard to describing trends from PISA 2015 backwards to earlier cycles remained unclear.

SCALING OF DATA
With regard to the approach of scientifically conducting PISA and using the data from the study, the National Project Management in Germany is always interested in replicating key steps of the data processing. In order to do so, a high level of transparency from international contractors (expert groups responsible for work packages at the international levels, such as sampling or data management) towards NPMs is necessary. Amongst other issues, this needs to include clarifying the choice of the model used for scaling the data and the approach adopted to deal with missing values in the student responses.

ANALYSING AND INTERPRETING DATA
Data and results from PISA are usually communicated and released to the public at a certain date in December of the year following data collection. Until then, both data and results are under embargo by the OECD. This means that NPM researchers cannot submit articles to journals or other outlets for review before this release date, since they would break the embargo by doing so. Publishing a national report including in-depth analyses may be a good alternative, but it requires a high level of transparency by the OECD and international contractors to enable this to happen.

DISSEMINATION
The dissemination of the results is mostly steered by the OECD, with National Project Managers responsible for proactively authoring and disseminating national reports. In Germany, the curious case exists that OECD has an associate in Berlin, separate from the NPM, which publishes a report in German language as well. So at the time of the press release, there is a multitude of reports for journalists to digest: OECD’s international report in English, OECD’s international report in German language and the national report by the NPM.

IN CONCLUSION
Many of the methodological challenges that PISA in Germany has faced have been solved with greater precision in the routines adopted, both at the international and the national level. However, methodological decisions and innovations cannot work as a one-way street, top-down from OECD or the international contractors towards NPMs. Sometimes individual countries may be quicker to identify justifiable concerns, at least with regard to their country. So, for instance, German researchers have identified that shifting from paper-based to computer-based assessment is likely to have had an impact on the results of PISA 2015 in Germany (see, for example, Robitzsch et al., 2016).

Thematic analysis also benefits from taking account of local concerns. As recently seen with the publication of Volume III of the OECD’s PISA reports (OECD, 2017), results from PISA are not automatically received as an epiphany. Journalists and the public were also wondering whether it needs a study like PISA to detect that a close collaboration of parents and schools is quite helpful for student learning and well-being. The future of PISA and especially its reception in the public will be highly dependent on the openness and transparency of the discourse about PISA, including the transparency of data handling and the cooperation regarding data analyses. Dialogue and discourse between the central PISA team at an international level and nationally-based researchers on the project can only help the relevance and quality of the study develop over time.

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There is nothing straightforward about researching the teaching and learning of research methods.

Building the methodological capacity of the UK’s social scientists has been a concern of the Economic and Social Research Council (ESRC) for some time now. Recognising the complexity of the social problems facing us, the need for global competitiveness and the changing nature of the data landscape, the ESRC has been funding the National Centre for Research Methods (NCRM) for more than a decade. This strategic large investment is with a view to enhancing competence in advanced and innovative methods. It is only recently, however, that NCRM’s portfolio of research and training has included pedagogic research.

In the current Pedagogy of Methodological Learning study we are asking how the subject matter of advanced and innovative research methods is taught and learned.

This pedagogical research fits comfortably under a learning for change agenda in that the pedagogic culture in the research methods education and training arena is hugely in need of development. There has been an implicit transmission model at work: researchers with high level research skills will simply pass these skills on to new researchers via training in short courses. There has been an assumption that trainers/teachers will work out for themselves how to build competence in others and much trial and error in doing so. Systematic reviews of the literature (Wagner et al, 2011; Earley, 2014) have highlighted the lack of pedagogic debate about this. This is despite the distinctive challenges associated with teaching methodological literacy to diverse groups and methodological competence necessitating experiential learning and reflexivity. While there are published narratives of pedagogic journeys travelled by individual methods teachers or teams, there is limited pedagogic research and, until a recent journal special issue on this theme, few cross-citations in the literature. Clearly there is a pedagogic research gap in research methods education that needs to be filled. This brings its own methodological challenges – about how one researches the pedagogical work of methods teachers – and with it the challenge of building pedagogic culture where there is little foundation.

There is nothing straightforward about researching the teaching and learning of research methods. Even in sectors like early years education, where there is a rich underpinning of educational theory and influential philosophies at work, enabling teachers to articulate their pedagogy requires tailor-made research methods (Moyle et al, 2002). Higher education research is a far less developed field and HE teachers may have had little or no teacher training. The result is self-taught teachers
without the specialist pedagogical language to describe their craft. Pedagogy is by nature ‘hard to know’ (Nind et al, 2016) and especially so in this social context.

NCRM is engaging in pedagogic research to develop an evidence base to support a shift from merely providing ‘more training’ to having an informed pedagogic approach underpinning that training set within a supportive pedagogic culture. One of the aims of the Pedagogy of Methodological Learning study is to tease out the pedagogical content knowledge (Shulman, 1986) involved in social science research methods teaching for this and other audiences. Also influencing the research design and choice of methods is the principle of conducting this research in a collaborative, non-judgemental spirit. We are in the business of researching alongside methodologists, teachers and learners, fluidly occupying these roles ourselves and seeking constructive dialogue. Some methods teachers will have more content knowledge than pedagogic knowledge, others vice versa, but that the combination of these in pedagogic content knowledge is something that we need our methods to help us all come to understand and develop.

We have begun by using an expert panel approach (Lewthwaite & Nind, 2016). This has involved interviewing 21 people in the UK and internationally who we regard as experts or pedagogic leaders in social science research methods. (These are not labels that sit comfortably with the participants but through their textbooks and long histories as methods teachers they are people whose pedagogic content knowledge merits probing, among them John Creswell, Andy Field and Yvonna Lincoln.) We have explored the resonance of key themes from these data with the experts as a community through an online forum, and with methods teachers in the UK through a series of focus groups. This has involved considerable reflection on people’s practices, pedagogic roots and beliefs. To get closer to the pedagogic action and decision-making of methods teachers in situ, we have used the method of video-stimulated recall, reflection and dialogue. We have brought teachers and learners together in focus groups to discuss short video excerpts of pedagogic encounters that they have just been part of, focusing on specific pedagogic moments, their rationale and their impact. Through analysis of the dataset we are building an emergent typology of approaches, strategies, tactics and tasks, coming to understanding how methods teachers and learners work with data to build competence. Case studies of methodological and pedagogical innovation are allowing us to probe these further within new contexts.

I would not claim to have the perfect solution to the methodological challenge of researching the pedagogy of methodological learning. We are, though, building pedagogic culture. By working with teachers in making their implicit pedagogical knowledge explicit, understanding is being generated on how research methods pedagogy is articulated, enacted and experienced across different educational, methodological, disciplinary and sociocultural contexts. Thus, this distinctive area of pedagogy is becoming knowable to us as a community - subject to discussion, learning and change.

**REFERENCES**


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1 Melanie Nind, Sarah Lewthwaite & Debbie Collins http://pedagogy.ncrm.ac.uk/.

BERA Postgraduate (PG) Forum: 
Supporting the Next Generation of Educational Researchers

Since its inception in 2012, the BERA Postgraduate Forum has continued to grow in strength, encouraging membership from those pursuing PG study in HE as well as ECRs aiming to be professional researchers in the field of education.

During the past year, the PG Forum has worked proactively in response to member feedback developing workshops and seminars, and providing networking opportunities throughout the UK, including a flagship national PG symposium series focusing on research skills and scholarship. These have offered stimulating environments which have promoted debate and collaborative erudition between members from diverse backgrounds. In 2016, the Forum ran a series of symposia based on dilemmas in research. Delegates discussed their nascent research and shared their triumphs, troubles and experiences. Feedback was positive with demand for more, which BERA has been running throughout 2017.

Forum Convenors

GEORIE SHAW
Georgie Shaw is currently in the final stages of her PhD (Bath). She is an author and consultant in psychology and education. Georgie’s PhD spans the fields of psychology, anthropology and education focusing on highly transient groups. She has presented research worldwide and works indefatigably encouraging members to share their work, developing innovative approaches within the BERA community.

YUWEI XU
Yuwei is at the thesis-pending stage of his PhD (Glasgow) and recently takes up a lectureship at the University of Portsmouth. Yuwei continues to be the trailblazer for the Forum driving innovative ideas for opportunities for PG students and early career researchers to enhance their academic merits.

OLIVER HOOPER
Oliver Hooper has recently joined the Forum convenor team. He is in the third year of his PhD at Loughborough, working within physical education. His research has adopted a ‘youth voice’ approach to explore pupils’ learning about healthy, active lifestyles. Oliver brings a wealth of experience in PG representation and is also a convenor with the European Educational Research Association.

What’s new

The Forum has organised symposia across the UK, providing PGs with a space to discuss ‘practical issues’ experienced over the course of their studies within educational research.

The first two have taken place in Portsmouth and Glasgow this summer and the others take place in:
Bath Spa University, 23rd October 2017
Keele University, 3rd November 2017

The Forum is developing a ‘Writers Workshop’ where delegates can discuss ways to publish their research. The workshop will be hosted by King’s College London on 10th November 2017.

The Forum has developed partnerships with other research associations and is currently involved in organising a joint symposium on innovative approaches within educational research with the Scottish Educational Research Association (SERA). It is likely that this symposium will be held in Nottingham Trent University in September 2017.

Finally, the PG Forum is keen to establish links with other SIGs to widen PG participation and to provide opportunities for PG development. We’d also love to hear from our own Forum members about any event ideas they might have.

Further details about our forthcoming events will be updated through our website: https://www.bera.ac.uk/group/postgraduate-forum.
Critical and Theoretical Approaches to Ed Tech Research

By Jill Jameson,
Educational Technology SIG Convenor,
University of Greenwich

In a Brexit-dominated ‘post-truth’ era, the appeal of developing enhanced critical thinking and theoretical insights through alternative co-constructive dialogue within educational research seems gradually on the rise. Increased rigour in fact-checking sources of evidence and testing out assumptions seems particularly necessary at this time. Declining trust in the veracity of information on social media, combined with scepticism regarding the ethics, safety and effectiveness of some technological innovations such as driverless cars and blockchain technologies (Stewart, 2017) are highlighting the need for more thoughtful consideration of the ways in which we approach educational technology research.

Hence when we decided to organise a BERA Ed Tech SIG event on ‘Critical and Theoretical Approaches to Ed Tech Research’, there seemed to be an immediate interest from delegates in debating this emerging field of interest. And so it was that around 40 colleagues came together at The Open University in Milton Keynes on a beautifully sunny spring day for the 7th April joint BERA Educational Technology SIG/BJET/The Open University seminar.

Our aim for the day was to provide a reflective space to continue and deepen critical and theoretical discussions on the field of educational technology research. Initial debates on this were held at BERA SIG meetings and innovation events during recent BERA Conferences as well as during BJET-SIG joint events.

Critical literature relating to the evolution of the field of educational technology by various research experts has been growing for more than a decade and now seems strongly on the rise. Our invited Keynote Speakers – Professor Martin Oliver, UCL Institute of Education; Dr Sara Hennessy, Co-Editor of BJET, University of Cambridge; Professor Eileen Scanlon, Regius Professor of Open Education, The Open University – provided important critical and theoretical expert perspectives that built directly on prior literature and raised questions for delegates to debate.

Attendees were invited to discuss, in interactive presentations and in three workshops, how current challenges in educational technology are being considered and addressed in research, policy and practice in the field. Prof Martin Oliver challenged participants with his insights on ‘Educational technology: Why should we care?’, while the BJET Editors, led by Dr Manolis Mavrikis, led an interactive session on ‘Exploring best practices for critical write up in EdTech research publications’. Prof Eileen Scanlon and Dr Christothea Herodotou led the third workshop on ‘Critical aspects of technology-enhanced learning (TEL) interdisciplinary research: How to overcome challenges’.

Excellent feedback from delegates on both the content and venue for the day indicates that there is much interest in a similar event being organised in 2018. In the meantime, we need to continue to consider whether Neil Selwyn is correct in writing that much Ed Tech research has engaged in ‘previous decades of technological “boosterism,” hyperbole, and outright evangelism’ rather than genuine critical inquiry (Selwyn, 2015). Is there a need for greater critical (Bulfin et al., 2015), challenging and questioning ‘e-leadership’ of the field by those who are practising within it (Jameson, 2013)? How far is the evidence emerging from research findings in the field really engaging in a critical way with important global issues (Selwyn, 2015) to effect a strongly beneficial influence on education policy, theory and practice, including, particularly, outcomes for learners? To what extent are researchers really leading, critiquing and shaping the field?

REFERENCES

The ‘Messiness’ of Theorising Childhood

By James Reid,
Children and Childhoods SIG Convenor,
University of Huddersfield

The development of the Children and Childhoods SIG was undertaken in recognition of the complexities involved in researching with children, of their lives and the ‘messiness’ of the concept of childhood. Indeed, the need for theorizing in the social study of childhood is of significant concern, with calls to move beyond the naming of concepts to empirical analysis. Priscilla Alderson (2016) argues for child research that bridges the gap between dualisms, urging childhood researchers to move away from description and to concentrate on empirical work that is focused on people in the actuality of their lives and explicates ‘why’. Leena Alanen in discussing ‘intersectionality’ argues, “the challenge [is] that intersectional thinking appears to be a similar thought experiment in the case of children as it is in the case of women” (Alanen, 2016: 159). In this she recognises both the epistemological diversity and complexity of standpoint in feminist theorising, and the messiness for the social study of childhood taking up these concepts and ideas.

Similarly, Jens Qvortrup (2016) argues that the social studies of childhood is “crying out” for a theoretical home. However, to embed this in theories of class, race, gender and so on is insufficient since this excludes certain categories of children in their empirical and analytical work. Hammersley (2016) raises concerns that particular differences are played down in childhood research, specifically biological differences between children themselves and children and adults. He further argues that there is a tendency towards constructionism, agency and participatory methods which, however important and significant the debates, “involve inconsistencies and tensions that vitiate their capacity to form a coherent and effective approach” (Hammersley, 2016: 11). This all raises several important questions including who and for what purposes decisions about children’s lives and childhood are made and what is the standpoint of the researcher and research in predominant institutional categorising? The demand is to move beyond describing categories and experiences to understand and theorize the processes of construction as they are experienced and taken up by children.

This is a challenge in our empirical work in the contemporary political climate. Today, children live and researchers work under more restrictions than ever. There is double exclusion for children (Alderson, 2016) because of the theoretical deficit, when children are confined to limiting discussion between childhood academics in and beyond childhood conferences or academic papers, and not represented otherwise. One aim of the SIG is therefore to raise questions about how children and young people are theorised and represented. We do this both at the BERA Conference, in our liaison with BERA and other SIGs and through seminar events involving national and international scholars. We welcome new members who want to discuss their conceptual and empirical work and also those who are interested in the boundaries between child, children and childhood.

REFERENCES

The 2016 BERA Conference provided The Educational Effectiveness and Improvement SIG with an opportunity to meet and discuss the areas for focus in 2016/17. Members of the SIG were keen to hold events focused on:

- Social emotional well-being and mental health in schools;
- Challenges for school effectiveness and improvement.

The first of these events was held at the University of Oxford’s Green Templeton College on 28th April 2017. SIG members Wendee White (University of Dundee) and Elizabeth Nye (University of Oxford) organised a seminar, ‘Social Emotional Well-Being and Mental Health of School-Aged Children’, that was very well attended by representatives of schools, local authorities, third sector organisations and universities. The workshops enabled delegates to explore mindfulness, communities of cooperative learners, international perspectives on well-being and school achievement, children’s voice, reducing stress for students, and supporting children through school transitions. All delegates said that they would recommend this event to others, which is great feedback and has encouraged the SIG to consider a follow-on event for 2017/18.

The second SIG event took place on 12th June at Plymouth University and was organised by the SIG Convenor, Tanya Ovenden-Hope. This event was a one-day conference ‘Exploring Recruitment, Retention and Region: the new three ‘R’s’ challenging schools in England’ and brought together internationally renowned academics, leading policy-makers and education professional body representatives for the first post-election discussion on teacher recruitment and retention and the impact of region on these issues. The keynote speaker was Professor Stephen Gorard of Durham University, who began the day with a challenge - ‘Regional Differential Effectiveness and Other Myths’. Following two symposia that called on Ofsted’s research, TeachVac’s findings, academics’ research, school partnerships developments and new types of teacher education provision, the conference ended with a panel discussion on issues emerging from the election relevant to teacher recruitment and retention.

The SIG is inclusive of all research and related activity that is relevant to educational effectiveness and improvement. We welcome new members and encourage all members to engage in SIG activities. The BERA Conference 2017 has the highest number of SIG papers yet and we look forward to seeing you there.

“What a fantastic day – useful, connected and practical value.”
Delegate, EE&I SIG Event 28/4/17

Picture: Elizabeth Nye and Wendee White
BERA publishes four highly regarded and internationally peer reviewed journals. BERA members receive access to all four BERA journals online, as well as receiving a hard copy of BERJ posted to their mailing address quarterly. Our journals confirm the Association’s commitment to engagement with the field, building capacity within the field, and dissemination of research.

**British Educational Research Journal (BERJ)**

BERJ is interdisciplinary and showcases the very best of educational research from Britain and throughout the world. It includes reports of case studies, experiments and surveys, discussions of conceptual and methodological issues and of underlying assumptions in educational research, and accounts of research in progress.

**British Journal of Educational Technology (BJET)**

BJET is a primary source for academics and professionals in the fields of digital educational and training technology throughout the world. It publishes theoretical perspectives, methodological developments and high quality empirical research that demonstrate whether and how applications of instructional/educational technology systems, networks, tools and resources lead to improvements in formal and non-formal education at all levels.

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The Curriculum Journal publishes original contributions to the study of curriculum, pedagogy and assessment. The journal makes a specialist contribution to knowledge related to the educational phases that impact on children from the early years to adulthood.

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The next issue of *RI* (RI 134, Autumn 2017) will focus on BERA’s Research Commissions – setting the agenda and building capacity.

*RI* (Research Intelligence) is BERA’s primary record of members’ contributions to the field. Each issue is dedicated to a holistic investigation of a topical theme of interest to the field of educational researchers, and those with an interest in the impact of educational research on policy and practice. We regularly invite contributions from researchers at different stages in their career to demonstrate the Association’s commitment to engagement, capacity and dissemination. If you have recently completed research that you feel demonstrates a strong link to upcoming themes as outlined above, then please summarise in 900–1000 words and send to the Editor c/o beraresearchintelligence@gmail.com with the subject line “RI 134”.

The deadline for RI 134 papers will be 8th September, 2017.

OPINION AND GENERAL CONTRIBUTIONS - THE BERA BLOG

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The Blog editorial team welcome articles of 500–750 words (including any references) that are:
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- opinion pieces;
- responses to policies;
- experiences as an educational researcher;
- experiences using research.

Prospective contributors should ensure their contributions:
- are research informed;
- avoid jargon, dense language and excessive references;
- provide links to sources where possible;
- use inclusive and non-derogatory language;
- do not include obscene or rude content, or content that belittles or attacks persons or groups;
- do not link to profane, obscene, rude, or illegal material or to sites that knowingly violate intellectual property rights.

Please see: https://www.bera.ac.uk/blog for more. All BERA Blog submissions should be sent to: publications@bera.ac.uk

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- Relevance (e.g. to the Association’s purposes)
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