A Qualitative Study of Staff Stress, Morale and Well-being in Victorian Government Schools

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Declaration of Originality

This thesis does not contain material which has been accepted for any other degree in any university. To the best of my knowledge and belief, this thesis contains no material previously published or written by any other person, except where due reference is given in the text.

Signature

Michael S. Sturmfels
ABBREVIATIONS

AP       Assistant Principal
CS       Case Study
DEECD    Department of Education and Early Childhood Development
DE&T     Department of Education and Training
DoE      Department of Education
GHQ      General Health Questionnaire
OCDQ     Organisational Climate Descriptive Questionnaire
P        Principal
S        School Service Officer
SOHQ     School Organisational Health Questionnaire
SOS      Staff Opinion Survey
SSO      School Service Officer
T        Teacher

The Staff Opinion Survey will be referred to as SOS in the thesis.
ACKNOWLEDGEMENTS

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ABSTRACT
This research investigated the nature of teacher stress, morale and well-being as understood by staff in Victorian government schools against the background of an existing organisational health measure undertaken annually, the Staff Opinion Survey. The major research question examined constructions of stress, morale and well-being through staff perceptions of their own experiences and the experiences of other staff. Sub-questions examined the degree to which stress and morale were perceived as individual or group phenomena, and contextual elements which affected response to the Staff Opinion Survey. The study took a qualitative methods approach through in-depth case studies of staff in three schools of different types: primary, secondary and P-12, which is a primary and secondary school combined. The research instrument involved semi-structured interviews of 12 to 13 staff in each school, including a range of teaching and non-teaching staff who were eligible to complete the survey. The study revealed considerable variation in organisational health both within and between schools, including differences between primary and secondary staff. The investigation confirmed research indicating job satisfaction for teachers came from interaction with students, and that stress is perceived as a highly subjective, individual phenomenon based on the experience of negative emotions. It found that morale was viewed as having both individual and group dimensions with qualitative differences, individual morale being more related to job satisfaction and group morale to social cohesion. High staff morale was underpinned by elements of support, teamwork and communication. The investigation showed that many staff lacked confidence in the Staff Opinion Survey as a form of communication and highlighted the perceived impact of emotional factors on response to the survey. The research indicated that optimising staff organisational health is closely associated with the management of emotions and the beliefs which they represent. It suggested that school leaders need to recognise and understand the importance of emotions in determining organisational outcomes; particularly those related to harmonious group interaction; and that quantitative measures of organisational health such as the Staff Opinion Survey should be supplemented by school-specific qualitative processes.
CHAPTER ONE – CONTEXT

INTRODUCTION

Organisational health has become widely recognised as an essential element in determining beneficial educational outcomes for students, and improving organisational health has therefore become a significant goal of school systems in a number of countries, including the United Kingdom, the United States of America and Australia. The key factor in the health of an organisation is its employees, in the case of schools, its teaching and ancillary staff, and the interactions they have with students and with each other. Studies of organisational health in education have variously involved investigating the stress, morale, well-being and job satisfaction of staff in schools, either as separate concepts or in relation to one another, examining both individual characteristics and aspects of group interaction.

One of the most significant factors impelling research into organisational health has been the increasing financial and human cost of employee compensation claims relating to psychological stress (Jackson & Clements, 2006; Macklin et al., 2006), and the apparent high level of job distress across a range of occupations, including teaching, which is widely regarded as being one of the most stressful of careers (Bernard, 1990; Gold & Roth, 1993; Humphrey & Humphrey, 1986). The impact of greater accountability demands, pace of educational reform, increased workloads, challenging student behaviour, and negative community attitudes, have all been perceived as contributing to a reduction in staff morale and well-being, both in Australia and overseas (Evans, 1997b, 1998; Mackenzie, 2007; O’Brien & Down, 2002).

In Victoria, measures associated with the organisational health of government (public) schools have been a particular focus of the government since it instituted a major study of teacher stress in the late 1980s (Applied Psychology Research Group [APRG], 1990), and then, during the following decade, introduced a number of reforms aimed at strengthening organisational practices, improving staff well-being, reducing occupational stress and increasing school accountability (Department of Education [DoE], 1998; Hart, 2000). The focus on organisational health began with a series of initiatives targeting areas such as staff discipline and welfare, leadership skills and team-building (Hart, 2000). Central to the organisational health program for schools
from the mid-1990s was a series of mandatory annual surveys of staff, students and parents which provided detailed data for school administrators and enabled a diagnosis of the organisational health of individual schools, as well as comparison between schools (DoE, 1998; Hart, 2000; Hart et al., 2000). The most prominent of these surveys was a standardised questionnaire for staff, the Staff Opinion Survey (SOS), which was used continuously in various forms in all government schools from 1996, when the inclusion of SOS data on school morale, leadership support, goal congruence and staff interaction was made compulsory as part of each school’s annual report (Hart, 2000). In 2004, the SOS was undertaken by 41,500 staff in over 1,580 schools (Department of Education and Training [DE&T], 2004a).

The SOS, based on the work of Hart and colleagues (Hart, 1994; Hart et al., 2000), was developed to assist schools in evaluating organisational climate and levels of school well-being, and to provide for focused strategies of self-improvement through staff perceptions of management practice and feelings about their work (DoE, 1998; Hart, 2000). By providing “a diagnostic instrument for assessing school organizational health” (Hart, 1994, p. 114), it enabled “individual schools to own and use reliable and valid quantitative school climate data” (DE&T, 2005b), which not only allowed them to analyse their own levels of organisational health, but to compare themselves on key characteristics with other schools. The SOS was accompanied by documentation for administrators which helped schools to interpret the resulting data and suggest what form of action needed to be taken as a consequence (DE&T, 2004a, 2006a, 2006c).

The ongoing need for organisational health measures has been reinforced by the continuing cost of stress claims in government schools, with the SOS data assisting in associated policy development and better understanding of these claims (DE&T, 2005b). A government stress prevention strategy emphasised the importance of school climate in influencing the ability of staff to cope with stress and workplace pressures (DE&T, 2004c). The importance of a positive school climate in determining staff effectiveness in a healthy school environment was built into the characteristics of the government’s model of effective schools (DE&T, 2006a). The SOS was part of a government strategy which stipulated that “all schools will be provided with parent, teacher and student opinion data on a consistent basis” (DE&T, 2005a, p. 1). The SOS has been described as “the only validated measure of teacher morale and school
organisational climate that assesses a range of important organisational behaviour and human resource management issues” (Hart et al., 2000, p. 224).

**PURPOSE**

The basis for this investigation arose from two sources. Underpinning the SOS itself and the analytical models which accompanied it (Hart, 1994, 2000; Hart et al., 2000) were particular theoretical constructions of stress, morale and well-being, and assumptions about organisational health, which were situated within a wider debate about the nature of these concepts and how they were to be measured (Evans, 1997a, 1997b, 1998; Hart, 1994; Lazarus & Folkman, 1984; Nias, 1981). Existing aggregated SOS data also raised questions about the nature of organisational health in Victorian government schools, in particular, variations in organisational health both within and between schools which have yet to be fully investigated (Hart, 2000).

The aim of this qualitative research was therefore to investigate how the inter-related concepts of stress, morale and well-being were constructed by staff in individual school contexts, and the role that these factors played in organisational health, as understood against the background of quantitative data collected through the standardised SOS. The research involved case studies of a primary, secondary and P-12 government school, to assess a range of contexts taken from the most common school types in the system. The research methodology used individual interviews as the primary research instrument, collecting data from a range of staff members who undertook the SOS, including non-teaching staff, classroom teachers, leading teachers and principals. Interviews were chosen as the most appropriate form of data collection as they offered a detailed insight into subjective perceptions of organisational health factors and gave a particular richness and depth of information which could be directly compared with existing quantitative SOS data. The semi-structured format of these interviews allowed some comparability of data between different schools but also enabled particular contextual themes to be more fully investigated. Field notes taken throughout the research were used to strengthen understandings of particular contexts.
RESEARCH QUESTIONS

The major research question investigated the subjective understandings of key concepts associated with organisational health from the perspectives of individual staff members in Victorian government schools and how these related to organisational health in these schools. The two sub-questions analysed these understandings in relation to the dimensionality of stress and morale and to perceptions of the SOS.

Major research question:

How are the concepts of stress, morale and well-being constructed by staff in Victorian government schools and what role do such factors play in the organisational health of these schools?

Sub-questions:

(1) To what extent do staff perceive stress and morale as both group and individual phenomena?

(2) What contextual elements impact on responses to the Staff Opinion Survey?

BACKGROUND

The research took place in Victoria, the second most populous state in Australia, which contains a mixture of Catholic, independent, and government schools, catering for the primary and secondary education of students mainly aged between 5 and 18. At the time of the research, the government-run education system, with which this study is concerned, was administered by the Department of Education and Training (DE&T), later known as the Department of Education and Early Childhood Development (DEECD). The two main types of government schools in Victoria are primary (Years prep to 6), for students mainly aged between 5 and 12, and secondary (Years 7 to 12), for students mainly aged between 12 and 18 (DEECD, 2008). There are also a much smaller number of other school types such as P-12 (primary-secondary) schools, senior colleges and special schools. In January 2008 there were an estimated 40,800 teachers, 310,300 primary students and 227,300 secondary students in government schools in
Victoria (DEECD, 2008). Of the 1587 government schools, there were 1202 primary schools, 253 secondary schools, 52 primary-secondary schools, and 80 other schools (DEECD, 2008). The vast majority of government schools including those used in this study were co-educational. Schools ranged in size from less than 20 students and one or two staff, typically isolated, rural primary schools, to schools with well over 1000 students and 100 staff, typically urban secondary schools. The supervision of schools within the government education system was divided into administrative regions, four in metropolitan Melbourne and five in rural Victoria, with between 130 and 250 schools in each region. This research was conducted in three different schools, representing the two major school types, primary and secondary, and a third school type, P-12, chosen because of its combination of primary and secondary education within the one setting. All three schools came from the same administrative region located in rural Victoria.

The employees in Victorian government schools who undertake the SOS and who were represented in this study comprise a range of teaching and non-teaching staff, both permanently employed and on contracts. The four-year trained teaching staff are divided into the three classes, principal class (principals, assistant principals and head teachers), leading teachers and classroom teachers, with each class encompassing a number of salary sub-ranges depending on school size (principal class), school preference (leading teachers), and years of experience and review (classroom teachers). Typically, principals spend most or all of their time in administration, assistant principals divide their time between administration and some have teaching responsibilities, leading teachers have some allowance for administration but mostly teach, and classroom teachers focus on teaching. Depending on size, each school usually has a number of non-teaching staff to carry out ancillary duties, at the time of the research known as school service officers or SSOs (now education support staff), such as business managers and office assistants, integration aides, computer and laboratory technicians, and library assistants. These staff are not employed as qualified teachers and are not expected to have direct responsibility for students, although many of them work with students in various capacities, meaning the line between teachers and non-teachers is not always clear-cut. As well as teaching and non-teaching staff, schools often employ a variety of other contract or casual employees such as school cleaners and gardeners who, unlike teachers and SSOs, were not eligible to do the SOS.
As far as this investigation is concerned, the term “staff” is generally used to refer to all qualified teachers (including the principal class) and SSOs, both full-time and part-time employees, who were eligible to undertake some or all sections of the SOS, and therefore to contribute to aggregated data on school organisational health (including those dimensions relating to individual and school distress and morale). The term “teachers” is generally used to refer to qualified teachers, comprising leading teachers and classroom teachers, and “classroom teachers” more specifically to distinguish teachers whose focus is on the classroom with few administrative responsibilities. The term “organisational health” is used broadly to refer to any aspect of staff well-being and the welfare of the organisation as a whole, unless used more specifically in relation to the view of organisational health reflected in the SOS and its associated theoretical models. The term “SOS” refers to the Staff Opinion Survey. The three case study schools are referred to as school A (first case study, primary school), school B (second case study, secondary school), and school C (third case study, P-12 school).

SIGNIFICANCE OF THE STUDY
Research into organisational health in education has involved researchers covering a range of theoretical and empirical areas depending on their particular values, interests and goals. Many studies have been quantitative and broad-scale in nature, often employing a standardised questionnaire as the research instrument, yielding statistical data enabling the analysis and interpretation of variables of interest and generalisation of results (Coughlan, 1970; Hart, 1994; Kyriacou & Sutcliffe, 1978b). Other researchers have concentrated on more intensive, qualitative studies of small numbers of schools or teachers, often using interviews as the main method of data collection (Evans, 1997a, 1997b, 1998; Nias, 1981; Nias et al., 1989). Areas of interest have included well-being, stress, morale and organisational health or climate.

Subjective well-being has usually been used to refer to an individual’s global view of a range of aspects of their health, including a judgement of life satisfaction, and positive and negative affective components (Davern & Cummins, 2006; Diener, 1984; Horstmannshof et al., 2008). A component of subjective well-being is job satisfaction, an individual’s assessment of how they feel about their occupation, which has been widely
studied across a range of occupations (Locke, 1976). Central to research in this area has been Herzberg’s (1968) two-factor theory of job satisfaction, involving motivation and hygiene components. Stress, or distress, to distinguish its negative characteristics, has received vast research attention since its identification as a physiological phenomenon with psychological components by Selye in the 1930s (Selye, 1976). Psychological stress has been the subject of many educational studies since the late 1970s, particularly in the United Kingdom following the work of Kyriacou and Sutcliffe (1977, 1978a, 1978b, 1979b). The dominant theoretical construction of psychological distress has been the cognitive-mediational model of stress as a transactional process with key elements of coping and appraisal formulated by Lazarus and Folkman (1984). Stress as a psychological label has usually been applied to individuals, although in the SOS there are separate constructs for individual and school distress. Morale, which has received less attention, has usually been associated with the level of positive feeling in a group (Guba, 1958; Smith, 1966, 1976, 1987) but has also been regarded as a characteristic of individuals (Doherty, 1988; Evans, 1997b, 1998). Morale has been measured as a separate concept (Doherty, 1988) but has also been used as a sub-scale of general measures of organisational climate, as in the SOS, where there are dimensions for individual and school morale. Organisational climate or organisational health, examining the well-being of an organisation, has mostly been researched using quantitative surveys (e.g. Hart, 1994; Hoy & Feldman, 1999), whereas organisational culture, examining the dynamics of social interaction within an organisation, has often involved narrow, more intensive qualitative studies of a small number of schools (e.g. Evans, 1998; Nias et al., 1989).

There have been a number of studies of various aspects of organisational health in education in Australia. These have included Smith’s (1966, 1976, 1987) extensive research project into school morale in New South Wales; a qualitative study of stress amongst Victorian teachers by Otto (1986); a major investigation into teacher stress by the Victorian Department of Education (APRG, 1990); and Bernard’s (1990) study of stress amongst Victorian and Western Australian teachers. Hart (1994) worked extensively with Victorian teachers and schools in the 1990s in developing a program of organisational health which resulted in the development of the SOS modelled on his theories; while Rogers (1992, 2002) in Victoria, and Punch and Tuetteman (1996) in Western Australia, undertook research into the role of support in underpinning the well-
being of teachers. There was a government inquiry into the well-being of members of the principal class in Victoria in 2004 (DE&T, 2004d).

Unlike single concept studies which have been prevalent, particularly in the area of stress (e.g. Kyriacou, 1987, 1989, 1998), this investigation examined perceptions of a range of components of staff well-being, including job satisfaction, stress and morale, within an overall organisational health context, thus allowing some insight to be gained into the interrelationship of these concepts. By inquiring into both individual and staff experiences of stress and morale, the research enabled some understanding of the connection between individual and social constructions of these phenomena and the degree to which these formed separate dimensions. Furthermore, the study allowed for the comparison of perceptions of organisational health gathered through qualitative methods with corresponding data derived from quantitative surveys of organisational health, and for an understanding of the thinking behind survey responses. Unlike many studies which have focused on full-time teachers and on school leaders (e.g. Evans, 1998), this research included a range of non-teaching as well as teaching staff, thereby enabling a fuller understanding of the wider staff group in schools.

Many qualitative studies have concentrated on one particular school type (e.g. Pratt, 1978; Nias, 1981). By examining different school types this study was able to contrast a range of contexts, enabling the influence of school structures on organisational health to be assessed, in particular, to gain some understanding of the reasons why secondary schools have consistently reported lower levels of organisational health than primary schools (DoE, 2008; Hart, 2000). It was also hoped that, through a deep study of a small number of contexts, the investigation may have given insight into observations of variations in organisational health within schools. Finally, this research was intended to benefit administrators who use surveys to diagnose organisational health in schools to understand how these surveys are perceived by respondents, and what impact these perceptions may have on the data which is obtained through these methods.

**STRUCTURE OF THE THESIS**

This introductory chapter provided the context and background of the research and explained its parameters. Chapter 2 provides a summary of literature relevant to the investigation while Chapter 3 outlines the methodology and research design used in the
inquiry. The research findings (Chapters 4 and 5) are divided into two sections which present the findings in different forms. Chapter 4 gives an extended description of the findings under interview question headings, with priority given to the voices of the interviewees, while Chapter 5 provides a shorter summary of these findings under major themes. The reader may choose to omit Chapter 4, which is included to recognise the rich body of data from which the research findings are derived, or, alternatively, to omit Chapter 5, which repeats information from Chapter 4 in a reduced form. The final chapter, Chapter 6, interprets and comments on the findings, and discusses their relevance to previous research.
CHAPTER TWO – REVIEW OF LITERATURE

This chapter provides a background to the literature relevant to the research design and research questions. The areas to be examined in this literature review are well-being, stress, morale, organisational health and the SOS. These areas formed the focus of the investigation and provided the structure for the interview schedule described in the following chapter. The chapter begins with a discussion of the broad concept of well-being, including job satisfaction, followed by stress, associated with negative emotions, and then morale, associated with positive emotions. An examination of organisational frameworks leads into a description of the development and key elements of the SOS. Each concept is discussed in terms of its theoretical construction as well as how it has been measured, and is related to the organisational health model associated with the SOS developed by Hart and colleagues (Hart, 1994, 2000; Hart et al., 2000).

The chapter is intended to provide a broad overview of a number of related concepts rather than a comprehensive analysis of any one particular research area, as the field of stress in particular is so extensive that it would be difficult to do justice to even a fraction of the published material referring to it. As the literature on stress in education is significantly greater than for other well-being concepts, the discussion of this area is more detailed. It should be noted that there is some unavoidable overlap between discussions of concepts where they form part of a larger theoretical framework which needs to be described.

WELL-BEING CONCEPTS

This section examines the concepts of well-being and job satisfaction, and their roles within theoretical models underpinning the SOS. Well-being is a term referring to all-round health, while subjective well-being is usually thought to include components of life satisfaction as well as emotional elements. Job satisfaction is generally viewed as a judgement of the level of satisfaction associated with a specific occupation. The discussion of subjective well-being includes reference to theories of emotion, particularly the relationship between positive and negative emotions implied by the SOS model.
WELL-BEING

Well-being has been a term widely used in contemporary discussion about the welfare of individuals and, to a lesser extent, social groups and organisations (Cotton & Hart, 2003; DE&T, 2004d; Diener, 1984; Holmes, 2005). In health psychology it has generally been employed as a broad indicator of relative health (Davern & Cummins, 2006), part of a modern approach which emphasises positive behaviours which promote health, as well as reducing unhealthy behaviours, as distinct from an older view of health which tended to focus on the absence of disease (Humphrey & Humphrey, 1986). Well-being has been regarded as a global concept covering a range of emotional, mental, intellectual, social, physical and spiritual components comprising overall wellness, happiness, satisfaction with life, and good health (Coon, 2001; Holmes, 2005; Masters, 2004). Most definitions of well-being include some form of emotional or psychological well-being as well as somatic elements (Cox, 1978; Davern & Cummins, 2006). A high level of well-being assumes that each of the components of well-being is functioning optimally (Horstmanshof et al., 2008; Humphrey & Humphrey, 1986). The significance of well-being in organisational health arises from the widely-accepted connection between promoting good health or well-being and reducing negative outcomes such as job stress (Cox, 1978; Guerrera, 2008). Well-being has usually been perceived as an individual rather than a group-level phenomenon (Spector et al., 2001).

Subjective well-being

Psychological or subjective well-being (SWB), an individual’s perception of their own levels of wellness (Davern & Cummins, 2006), has been of particular interest to researchers into organisational health since employee well-being was linked to economic productivity (Diener, 1984). Early research into subjective well-being focused on the concept of general happiness as a desirable quality and its psychological causes (Diener, 1984; Diener & Emmons, 1984). Although not identical, the terms happiness and subjective well-being have often been used interchangeably, but the latter is now preferred by researchers as having a more precise meaning (Wright & Cropanzano, 2000).

The current widely-accepted view of subjective well-being differentiates it into specific dimensions: as a combination of cognitive self-evaluation of overall or global life satisfaction, together with emotional components comprising levels of positive affect.
and negative affect (Davern & Cummins, 2006; Diener, 1984; Horstmanshof et al., 2008); and with life satisfaction being the more stable or enduring element (Diener, 1984). A level of high subjective well-being is therefore associated with a high level of life satisfaction, dominant positive emotions and reduced negative emotions (Diener, 1984). This understanding of well-being assumes that subjective well-being involves some form of self-evaluation of life as a whole, that well people experience more positive emotions, and that there is a meaningful relationship between self-perceptions of happiness and objective well-being (Diener, 1984; Wright & Cropanzano, 2000). Subjective well-being has also been equated with perceived quality of life (Hart & Cooper, 2001; Hart et al., 1995) and with the overall effective functioning of an individual (Wright & Cropanzano, 2000).

A number of characteristics of high levels of subjective well-being have been identified. These have involved traits associated with personality (Hart, 2000; Horstmanshof et al., 2008), such as positive thinking, resilience and self-confidence (Coon, 2001), as well as being involved in supportive social relationships (Coon, 2001; Horstmanshof et al., 2008). Ryff's model of psychological well-being (Horstmanshof et al., 2008) comprised domains including “feelings of mastery, autonomy, personal growth, self-acceptance, life purpose, and positive relations” (p. 101). Warr (Horstmanshof et al., 2008) suggested that principal environmental influences (PEIs), such as physical security and availability of money, and opportunities for control, skill use and personal contact, interacted with personal factors to affect levels of well-being. Unemployment has been associated negatively with subjective well-being (Horstmanshof et al., 2008; Locke, 1976) because of the importance of work in providing time structure, collective participation, social identity and status, and financial security (Horstmanshof et al., 2008). Lower levels of well-being within an organisation have been correlated with interpersonal conflict and with more directive rather than supportive leadership styles (Cotton, 2008).

**Emotional dimensions of well-being**

Emotions have been recognised as being integral to a number of aspects of well-being, including experiences of stress (Lazarus, 1993), and form the basis for the dimensions of distress (negative emotions) and morale (positive emotions) in the SOS. The study of emotions is a long and complex one. Emotions were historically perceived in a
physiological context, as part of a general adaptive response involving tension-reducing attempts by the body to return to homeostasis (Lazarus, 1993; Lazarus & Folkman, 1984). Criticisms of this behaviourist approach led to cognitive theories of emotion, such as Schachter’s two-factor theory (Cox, 1978), in which physiology and cognitive labelling of arousal interacted to create an emotional experience. Lazarus and colleague (Lazarus, 1993, 1999; Lazarus & Folkman, 1984) emphasised the roles of values and beliefs in influencing emotional experiences. According to this theory, the experience of a particular emotion results from an individual’s appraisal of harms and benefits in the interaction between person and environment (Lazarus, 1993, 1999). Such an ongoing transaction means that an “emotion is always in flux temporally and across diverse encounters” (Lazarus, 1989, p. 51), as the coping process modifies the appraisal and changes the emotion experienced. Emotions form part of a complex and changing system which includes antecedents, mediating processes, response patterns, emotional thoughts and physiological changes (Lazarus, 1989, 1999; Lazarus & Folkman, 1984). It is now generally accepted that neither emotions nor cognition precede one another, but they are closely connected elements of an ongoing transactional process (Lazarus, 1999; Lazarus & Folkman, 1984).

Researchers have sought to isolate and describe the different types of emotion experienced. Plutchik’s model (Cox, 1978) suggested there were eight primary emotional states which in combination form our emotional experiences. Lazarus (1999) identified fifteen emotions which each have a different relationship to the environment. These included “nasty” emotions (anger, envy, jealousy), existential emotions (anxiety-fright, guilt, shame), emotions provoked by unfavourable life conditions (relief, hope, sadness-depression), and by favourable life conditions (happiness, pride, love) (Lazarus, 1999). He suggested that each emotion has its own core relational meaning, for example, anger as repairing self-esteem (Lazarus, 1999).

The debate about the relationship between positive and negative emotions, and therefore the dimensionality of subjective well-being, was stimulated by the work of Bradburn (1969) on social change and his theory of affect balance. Bradburn suggested that all emotional experiences are coded affectively from positive to negative, with the balance of these experiences forming the individual’s global judgement of level of subjective well-being or happiness (Bradburn, 1969; Davern & Cummins, 2006; Diener, 1984).
High levels of well-being are derived from a surplus of positive affect (PA) over negative affect (NA) (Bradburn, 1969). Bradburn argued that “people who express many negative feelings are no more likely to report a small number of positive feelings than are those who have few negative feelings” (Bradburn, 1969, p. 123), and that therefore subjective well-being was not a single continuum with positive and negative affective poles, but instead comprised two independent dimensions (Bradburn, 1969). This theory was followed by the SOS model (Hart, 2000; Hart et al., 2000) which viewed distress (negative emotions) and morale (positive emotions) as operating independently. The theory has implications for the study and treatment of distress (Diener & Emmons, 1984) because it implies that introducing positive strategies will not reduce distress, a view which Hart and colleagues have adopted in relation to organisational health (Cotton & Hart, 2003; Hart, 1994, 2000; Hart & Cooper, 2001).

Bradburn’s theory has received some empirical support (Diener, 1984; Diener & Emmons, 1984) but has been controversial, the literature on emotions generally supporting the existence of a single unified dimension or a strong inverse correlation between positive and negative affect, and questioning Bradburn for not measuring variations in emotional frequency and intensity (Diener, 1984; Diener & Emmons, 1984). However, Diener and Emmons (1984) argued that when these factors are taken into account, they show that the inverse relationship depends on the time frame used. This means that, though positive and negative emotions “could be strongly inversely related at particular moments in time” (Diener & Emmons, 1984, p. 1107), they are relatively independent over weeks or more. Diener (1984) noted that a current emotional state will encourage the disproportionate recollection of similar emotions, meaning a correlation in emotions of the same polarity. He observed that the inverse correlation between positive and negative emotions is stronger with greater emotional intensity, however, “their positive relationship in terms of intensity across persons cancels their inverse relationship in terms of frequency” (Diener, 1984, p. 549).

In terms of organisations, George (1990), who investigated positive and negative affect within groups, found support for the ASA (attraction-selection-attrition) framework. This theory suggested that “people with similar personalities will tend to be attracted to, selected by, and retained in a work environment” (George, 1990, p. 107), as group influences prevailed over individual tendencies. George found that group affective tone,
which depends on consistent affective reactions within a group, was influenced by the independent global personality dimensions of positive and negative affect, with the influence stronger when individuals shared similar personalities with others in the group (George, 1990). Group affective tone was measured in the SOS by school distress and school morale.

Measures of well-being
Most measures of subjective well-being have involved gauges of affective states and global life satisfaction combined with elements from general well-being scales. Diener (1984) listed 18 subjective well-being scales, with one of the most commonly used measures being Goldberg’s General Health Questionnaire (GHQ). The GHQ (APRG, 1990; Macklin et al., 2006) exists in a number of different forms of varying length between 12 and 60 items and measures general health over the previous few weeks. It includes somatic, anxiety, social dysfunction and depression sub-scales, and investigates aspects of well-being such as levels of concentration, getting along with people, and feelings of worthlessness (Punch & Tuetteman, 1996; Russell et al., 1995). The GHQ has been used as an indicator of psychiatric disturbance and stress (Macklin et al., 2006). Davern and Cummins (2006) used a questionnaire to examine seven life domains of subjective well-being, together with items of life dissatisfaction and a personal well-being index. Well-being measures have been adapted for specific occupations, such as the Police Quality of Life (PQOL) scale (Hart et al., 1995), which encompasses affective, cognitive and somatic components including dimensions of positive and negative well-being and ill-being, along with psychological distress and morale.

Surveys of life satisfaction have also been used to measure subjective well-being (Davern & Cummins, 2006; Macklin et al., 2006), such as Pavot and Diener’s Satisfaction with Life scale (Coon, 2001), Bradburn’s (1969) self-reports of pleasant and unpleasant experiences, and Warr, Cook and Wall’s Life Satisfaction scale (Horstmanshof et al., 2008), which comprises 11 items measuring satisfaction in specific life situations, and a single item measuring general satisfaction. Measures of general affect, used either alone or together with other well-being scales, are also common, such as Bradburn’s (1969) affective balance scales and Warr’s Affective
Wellbeing Questionnaire (Horstmanshof et al., 2008), which includes sub-scales measuring pleasure, anxiety and depression.

*Well-being and the Staff Opinion Survey*

Aspects of subjective well-being were addressed in the SOS through the motivation dimensions of distress (negative emotions) and morale (positive emotions). In theoretical models associated with the SOS, Hart and colleagues (Cotton & Hart, 2003; Hart, 1994, 2000; Hart et al., 2000), drawing on the work of Bradburn (1969), argued that distress and morale formed two separate affective paths which operated independently to determine overall quality of life, a summary judgement about the degree to which work satisfied individual needs. Quality of life includes cognitive and somatic health components and is distinct from ill-being (psychological distress) (Hart, 1994).

*JOB SATISFACTION*

Job satisfaction is generally regarded as a component of life satisfaction (Coon, 2001) which involves the elements of well-being relating to an individual’s occupation, the degree of happiness or unhappiness, or feelings of enjoyment which people have about their jobs (Evans, 1997a; Spector et al., 2001; Wright & Cropanzano, 2000). There has been considerable debate about what constitutes job satisfaction, with an apparent lack of clarity and consensus about its nature and causality (Evans, 1997a, 1998). However, most theories of job satisfaction seem to accept that it is a form of summary judgement which comprises both cognitive and emotional components (Wright & Cropanzano, 2000). For example, Locke (1976) described job satisfaction as “a pleasurable or positive emotional state resulting from the appraisal of one’s job or job experience” (p. 1300), and Schneider (1975) defined it as “an evaluation of structure in terms of some personal system of needs or values” (p. 462). Work on job-related attitudes has been extensive and long-standing, with nearly 2,000 references on job satisfaction recorded by 1957 alone (Evans, 1997a). However, levels of research into teacher job satisfaction have been relatively low when compared to other occupations (Evans, 1997a, 1997b; Nias, 1981).
Interest in job satisfaction has been stimulated by the assumption that there is a direct correspondence between the way employees feel about their work and beneficial organisational outcomes (Locke, 1976; Wright & Cropanzano, 2000). The Hawthorne studies of the early 1920s resulted in development of the theory that a happy worker is a productive worker (Locke, 1976; Wright & Cropanzano, 2000), leading to efforts to reduce employee fatigue and boredom (Locke, 1976). Since then, the study of satisfaction and dissatisfaction at work has incorporated such concepts as needs, rewards, values, expectations and desires (Cox, 1978; Evans, 1997a, 1998; Locke, 1976; Smith, 1987). Most definitions of job satisfaction have had a needs-based element and have connected it to meeting subjective needs and values. For example, Evans (1997b) defined job satisfaction as “a state of mind determined by the extent to which the individual perceives her/his job-related needs to be met” (p. 833), while Guba (1958) defined it as a state of contentment arising from meeting needs “with minimum expenditures of energy” (p. 197).

The dominance of need-based definitions of job satisfaction arose from research into human motivation by Maslow (1954) and job related-attitudes by Herzberg (1968). Maslow’s general theory of human motivation described a universal needs hierarchy which presumed that every individual had a set of needs which needed to be satisfied to fulfil human potential (Locke, 1976; Maslow, 1954). In this hierarchy, basic physiological and psychological needs essential to survival (such as food, water, and safety) have to be met before the higher, self-actualisation needs can motivate behaviour. Critics of Maslow have pointed out that needs vary greatly between people and cultures (Locke, 1976). They have also argued that the needs hierarchy doesn’t fit everyday experience, and that it confuses needs and values, and actions and desires (Locke, 1976). However, Maslow’s theory has stimulated a great deal of associated research, as well as highlighting the importance of psychological growth as a need (Locke, 1976).

The most influential needs-based theory of job satisfaction has come from the work of Herzberg (1968; see also Cox, 1978; Evans, 1997a, 1997b, 1998; Locke, 1976; Nias, 1981). Prior to Herzberg’s research, job satisfaction was generally regarded as part of a single, bipolar continuum of satisfaction and dissatisfaction (Evans, 1997a, 1997b,
His two-factor theory (Herzberg, 1968), paralleling Maslow’s earlier theory of dual needs (physical and psychological) (Locke, 1976), suggested that job-related elements could be divided into motivator and hygiene components, forming separate, unipolar dimensions. According to this theory, job satisfaction is dependent on intrinsic, subjective, motivator factors, which come from aspects of the work itself (such as achievement, recognition, and promotion) (Evans, 1997a, 1998; Herzberg, 1968). Job dissatisfaction in contrast comes from extrinsic, hygiene factors associated with the work context (such as salary, supervision, interpersonal relations, and working conditions) which prevent dissatisfaction but don’t promote satisfaction (Evans, 1997a, 1998; Herzberg, 1968; Locke, 1976). Extrinsic satisfaction refers to behaviour motivated by external factors such as salary or other rewards, while intrinsic satisfaction has no particular external reward as its motivation (Coon, 2001). Herzberg’s theory implied that satisfaction and dissatisfaction have different causes and employers needed to pay attention to both sets of factors (Locke, 1976). The theory has been criticised on a range of grounds: including dimensional issues, confusion between events and agents, the relationship with needs, and unclear differentiation between work itself and its context (Locke, 1976; Nias, 1981), but has been widely used.

**Teacher job satisfaction**

Research into teacher job satisfaction has been built on the foundation of Herzberg’s work (Evans, 1997a, 1997b, 1998; Nias, 1981). Nias (1981) agreed with Herzberg that satisfiers are intrinsic, deriving from the work itself (such as achievement and recognition) or meeting personal needs, but suggested that dissatisfiers can be both extrinsic and intrinsic. She argued that the distinction between work itself and its context broke down in education where “schools are social systems whose day-to-day working affects the lives of pupils and staff” (1981, p. 245), with elements which may be contextual in business but are intrinsic to teaching. She suggested making a distinction between extrinsic dissatisfiers and intrinsic negative satisfiers, which contribute not to dissatisfaction but to an absence of satisfaction, for example, the expectations teachers bring to their work or a lack of opportunities for personal growth, which Herzberg would have regarded as hygiene factors (Nias, 1981).

Evans (1997a, 1997b, 1998, 2001), researching job-related attitudes in English primary teachers, examined the relationship between needs and values in job satisfaction. She
distinguished between satisfactory (job comfort) and satisfying (job fulfilment) elements of job satisfaction (Evans, 1997a, 1998), which correspond with Herzberg’s hygiene and motivator factors. Evans suggested that job comfort represents the parts of work which meet a person’s current needs and determine the degree to which they feel comfortable. It means individuals being “satisfied with, but not by, the conditions and circumstances of his/her job” (1997a, p. 322). On the other hand, job fulfilment, true job satisfaction, represents the aspects of work which are worthwhile. It is a subjective assessment of how well a job is performed, “the sense of personal achievement which the individual attributes to his/her performance of those components of his/her job which s/he values” (1997a, p. 327).

According to Evans (1997a, 1998), the pursuit of job fulfilment consisted of a single factor, achievement, which was both fulfilling and motivating. This could be broken down into an eight-stage strategy, beginning with an individual’s perception of a perceived imperfect situation at work, and ending with a sense of achievement and job fulfilment through remedial action to which they have contributed (Evans, 1997a, 1998). In line with Herzberg (1968), Evans viewed job comfort and job fulfilment as unipolar dimensions which operate separately. She suggested that the removal of dissatisfiers (hygiene components) creates job comfort rather than job fulfilment (real job satisfaction), and the opposite of job fulfilment was not dissatisfaction but no satisfaction (Evans, 1997a, 1998). She also noted that the individual nature of job satisfaction means that “what satisfies one teacher will not satisfy another” (Evans, 2001, p. 293), so the same conditions may provide job fulfilment for one person but job comfort for someone else (Evans, 1998).

Sources of job satisfaction

Job satisfaction has been significantly associated with social contact, including opportunities for support and friendship, and good work relationships (Association of Independent Schools of Queensland [AISQ], 2003; Horstmanshof et al., 2008; Rathus, 1990; Travers & Cooper, 1998). It seems to be increased by workers being engaged in interesting, challenging and non-fatiguing work which enables them to experience success (Locke, 1976), and being recognised and rewarded for achievement (Rathus, 1990). Levels of job satisfaction have also been correlated with job autonomy and control, and having opportunities for promotion and advancement, as well as goal
setting and financial rewards (Rathus, 1990), job security and good health (AISQ, 2003). Key factors in reducing job satisfaction include repetitiveness of work (Locke, 1976), role conflict (where different roles have different demands), and role ambiguity (Cox, 1978; Locke, 1976), which is “where the individual has insufficient information about his role at work” (Cox, 1978, p. 163). More personal factors associated with low job satisfaction been thought to include age over 45, stress, lack of career prospects, work-family imbalance, and low trust in management (AISQ, 2003).

Job satisfaction is thought to be higher when there is a good fit between a person’s values, needs and expectations, and the work environment, its demands and expectations; and lower when there is a significant mismatch or lack of congruence between the two (Conley & Muncey, 1999; Coon, 2001; Cox, 1978; Evans, 2001; Locke, 1976; Macklin et al., 2006). In education, Evans (1997b, 1998, 2001) used a variant on the degree of match or best fit between person and job, the concept of professionalism, derived from Hoyle (1975a), to explain variations in job fulfilment experienced by teachers. Professionality refers to the range of knowledge, processes and skills which teachers use in their work (Evans, 1997b). Hoyle (1975a) suggested that there was a continuum of professionality from restricted, where teachers are narrowly focused on the classroom and classroom autonomy, to extended, where teachers have a wider vision and want greater professional control and opportunity to influence the broader teaching context. Evans (1997b, 1998, 2001) argued that it was the degree of correspondence between teachers’ professionality, or their “current values, needs and expectations” (2001, p. 293), and the contexts in which they work, which provides the basis for teachers’ job-related attitudes and helps explain the subjectivity of job satisfaction. She thought that teachers with extended professionality often experienced lower job fulfilment because they were unhappy with the broad educational direction of the school, whereas lesser or more narrow expectations were more likely to be met (Evans, 1997b).

A number of studies have observed that teachers gain most job satisfaction from the classroom through liking being with students and observing them develop (Evans, 1997a; Holmes, 2005; Hoyle, 1975; Nias, 1981). For Evans (1997a) it was teachers “working with children and watching them progress” (p. 326), and similarly for Nias (1981) it was teachers enjoying “seeing the children make progress” (p. 240). A key
element in this type of job satisfaction is the belief that the individual teacher has contributed to the student’s sense of achievement (Evans, 1997a, 1997b, 1998). Nias (1981) particularly highlighted the importance of emotional connections in job satisfaction for primary teachers which “met a felt need to love and be loved” (p. 240) as well as making them feeling appreciated and having their needs for personal competence fulfilled. Evans (1997a, 1997b, 1998, 2001) observed that job satisfaction for teachers generally comes from intrinsic, contextual, school-specific factors rather than extrinsic factors such as salary, centrally-initiated policy or teachers’ conditions of service. She also found that teachers experienced lower and more variable job satisfaction than academics and were less autonomous (Evans, 2001). Some studies have indicated that older, more experienced teachers have higher levels of job satisfaction (Kyriacou & Sutcliffe, 1979b; Travers & Cooper, 1998).

Evans (1998, 2001) also suggested that an important determinant in levels of job satisfaction in teaching was quality of leadership: “the medium through which are transmitted the values and ideologies represented by the contexts in which people work” (2001, p. 300), because of its role in shaping work contexts and resolving problems. She argued that job satisfaction is maximised through teacher-centred, supportive rather authoritarian, school leadership which meets individual needs as well as organisational goals, and encourages a “professional culture of tolerance, cooperation, compromise and consideration for others” (2001, p. 303). These findings have been echoed by research into successful school organisational cultures (Nias et al., 1989; Rogers, 2002).

**Measures of job satisfaction**

Researchers into job satisfaction have used both quantitative and qualitative methods, mainly employing some form of standardised self-report (Locke, 1976; Nias, 1981), the general drawback of which is that some “motives may be unconscious or situation-specific” (Nias, 1981, p. 237). Quantitative research, the prevalent methodology, has relied on the use of rating scales, such as the Job Satisfaction scale, comprising subscales measuring extrinsic and intrinsic satisfaction (Macklin et al., 2006), the Cornell Job Description Index (JDI), with five sub-scales relating to work, pay, promotions, co-workers, and supervisors (Locke, 1976), and the Minnesota Satisfaction Questionnaire (Wright & Cropanzano, 2000). Such measures have been criticised for lacking affectively toned items (Wright & Cropanzano, 2000) and for being descriptive rather
than evaluative (Locke, 1976). Herzberg (1968) measured job satisfaction by specific or critical incidents, asking employees to describe times when they were especially satisfied or dissatisfied with their jobs. In education, Kyriacou and Sutcliffe (1979b) used a single-item measure of levels of job satisfaction which involved asking teachers how satisfied they were with their jobs. Qualitative research exploring job satisfaction in teachers has typically involved case study investigations of staff in a small number of schools, using a mixture of participant observation and interviews (e.g. Evans, 1998; Nias, 1981; Nias et al., 1989). For example, Nias (1981) asked teachers what they liked and disliked about the job and their plans for the future. Interviews have been used much less frequently than rating scales in job satisfaction research because of perceived issues of objectivity (Locke, 1976).

_Job satisfaction and the Staff Opinion Survey_  
Job satisfaction is not directly referred to in the SOS itself but is described in associated theoretical models of organisational health as an umbrella construct which is a summary of emotional experiences closely related to psychological well-being (Hart, 1994, 2000; Hart & Cooper, 2001; Hart & Wearing, 1995); it is “the overall level of affect associated with a person’s work” (Hart, 1994, p. 112), a judgement of the degree of work-related satisfaction or dissatisfaction, after weighing up positive and negative experiences (Cotton & Hart, 2003; Hart, 2000). This model followed Herzberg (1968) in regarding job satisfaction as a bipolar construct (Hart, 1994; Hart & Cooper, 2001), with the separate paths best represented by morale (positive affective dimension) and stress (negative affective dimension). Hart (1994, 2000) used the low correlation between self-report measures of teacher stress and job satisfaction as evidence of the independence of these dimensions, suggesting that teachers can experience both high stress and high job satisfaction, and that job satisfaction indicators should not be used to measure occupational stress. He considered that job satisfaction was affected by such factors as personality, expectations, and career goals, but as the concept was difficult to define, organisational health research was best focused on levels of stress and morale (Hart, 1994, 2000).

**WELL-BEING SUMMARY**  
Well-being has been used broadly to describe various aspects of individual health, including physical, emotional, social and cognitive elements. Subjective well-being,
often equated with happiness, is a self-perception of levels of wellness. It is usually regarded as having a component of life satisfaction, together with levels of positive and negative emotion. High levels of subjective well-being are thought to be associated with personality characteristics such as self-belief and involvement in supportive relationships. Emotions are integral to well-being and are generally considered to be the outcome of an individual’s cognitive appraisal of harms or benefits in the environment. There is a debate about whether positive and negative emotions are independent from one another, as suggested by Bradburn (1969), or whether they are inversely related. The SOS model argued that well-being consisted of stress (negative emotions) and morale (positive emotions) operating independently.

Job satisfaction is an area of subjective well-being which involves a judgement of satisfaction or happiness about a person’s job, incorporating cognitive and emotional elements. The most influential theory of job satisfaction, deriving from Herzberg (1968), separated job satisfaction into the two dimensions of job satisfaction and job dissatisfaction, with job satisfaction resulting from intrinsic motivation and job dissatisfaction from work context. Evans (1997a, 1997b, 1998) described these two components as job fulfilment (or true job satisfaction) and job comfort. Job satisfaction in general seems to be associated with a high level of fit between person and job, job control, supportive leadership and opportunity for social contact. Job satisfaction in teaching has been observed to derive particularly from positive emotions arising from direct contact with students and making a measurable contribution to their achievements. The SOS model viewed job satisfaction as a bipolar construct including positive and negative emotional dimensions.

This section has provided an overview of the well-being context. The following two sections discuss the areas of stress, which is usually associated with the experience of negative emotion, and morale, associated with levels of positive emotion. These are the two areas of the SOS which form the particular focus of this investigation (first research sub-question). Research into stress has been a major stimulus for well-being initiatives in teaching and measures of well-being such as the SOS.

23
STRESS
This section describes the literature relating to stress, including definitions of stress and major stress theories, factors impacting on stress, stress management, and stressors in education. The section begins by examining the nature of the stress problem and is followed by a discussion of the various ways in which stress has been defined. The widely-accepted transactional view of stress is then outlined, with reference to the cognitive-mediational approach of Lazarus and Folkman (1984) and the dynamic equilibrium approach of Hart and colleagues (Cotton & Hart, 2003; Hart & Cooper, 2001; Hart et al., 1995; Hart & Wearing, 1995), associated with the SOS. Understandings of stress in education are then examined, followed by discussion of factors affecting experience of stress, causes of stress, and the measurement of stress. In this review, unless otherwise indicated, the term stress will be used to refer to the construction of psychological stress as distress, a negative emotional state, the definition used in the SOS.

THE STRESS PROBLEM
Research into the causes, effects and implications of stress has been extensive since its identification as a major factor negatively affecting employee health across many Western countries during the 1970s (Dworkin, 2001; Ford, 2004; Holmes, 2005; Patmore, 2006). In the United Kingdom, the cost of stress-related illness was estimated at £12 billion in 1996 (Miles, 1998), with the number of working days lost to stress doubling in the following decade (Holmes, 2005). In Australia, psychologically stress-related workers’ compensation claims contributed to more than half of all long-term claims not involving injury in 2001-2002 (Ford, 2004), and have continued to increase since (Cotton, 2008). The cost of Australian stress claims rose from an estimated A$30 million annually in 1994 (Patmore, 2006) to A$200 million in 2003 (Macklin et al., 2006). Claims for psychological injury in New South Wales and the Australian Capital Territory in 2004 cost government on average over A$27,000 per worker (compared with A$18,000 for physical injury) and resulted in 21 weeks off work (Jackson & Clements, 2006). Stress was held accountable for 20% of Victorian workers’ compensation claims and 38% of claim costs in the Department of Education and Training in 2003/2004, amounting to A$1.4 million (DE&T, 2005b). Recent research has indicated high work demands are responsible for 21,000 cases of depression in
Victoria each year, with nearly one in six cases resulting from job stress (Guerrera, 2008).

Education has been a particular focus of stress research internationally because of its perceived high levels of stress, particularly in the United Kingdom, the United States of America and Australia (Bernard, 1990; Brown & Ralph, 1998; Gold & Roth, 1993; Hart et al., 1995; Humphrey & Humphrey, 1986; Kyriacou, 1987; Lambert et al., 2006; McDonald, 2006). Teacher stress “damages lives, ends careers and affects teaching standards” (Holmes, 2005, p. vii). Researchers have reported up to 40% of teachers being affected by stress (APRG, 1990; Travers & Cooper, 1998), with one study even suggesting that as many as two-thirds of teachers described their work as extremely stressful (Mathison & Freeman, 2006). In the United States of America, teaching has been ranked as one of the five most stressful professions (McDonald, 2006), and stress has been held accountable for almost one-third of teachers leaving in their first five years (Webb, 2006). The incidence of stress amongst teachers has been generally estimated as being between 20% and 25% in the United Kingdom (Kyriacou, 1991, 1998; Kyriacou & Sutcliffe, 1978b). Teachers in Australia reported higher levels of psychological distress and lower well-being than police officers (Hart et al., 1995). Punch and Tuetteteman (1996) found teacher stress in Western Australia as “at least twice that for the general population” (p. 65), while Bernard (1990) in Victoria and Western Australia, and Laughlin (1984) in New South Wales, found 26% and 34% of teachers respectively were very stressed.

The diversity of stress estimates amongst teachers has been partly attributed to the use of self-reports to gauge stress levels (APRG, 1990), with estimates of stress sometimes based on a single question (e.g. Kyriacou & Sutcliffe, 1978b). The apparent vulnerability of teachers to stress has been attributed to a variety of factors, such as the public and people-focused nature of teaching (Bernard, 1990; Kyriacou, 1998): teachers having “responsibility for the welfare of others” (Bernard, 1990, p. 2) and being required constantly to put “egos on the line” (Bernard, 1990, p. 2). This means that “when things go wrong there is a danger that this can be interpreted personally” (Kyriacou, 1998, p. 7). Teachers also often have to deal with events beyond their immediate control (Bernard, 1990) and need to be vigilant in meeting a variety of demands placed upon them (Kyriacou, 1987). However, Fletcher and Payne (1982)
argued that teaching was not more stressful than other professions when measures of mental or physical ill-health such as the GHQ were used. It has also been observed that levels of stress may not impact on job satisfaction (Fletcher & Payne, 1982; Hart, 1994, 2000; Kyriacou, 1987), with Kyriacou (1987) noting that “some teachers report both high stress and high job satisfaction” (p. 148), while Fletcher and Payne (1982) reported that the “overwhelming majority of teachers liked their job” (p. 276) and had high self-esteem.

Stress in education received relatively little attention until the late 1970s, but has since been extensively studied, especially in the United Kingdom (Cox et al., 1989; Fletcher & Payne, 1982; Kyriacou, 1987, 1989, 1998, 2001; Kyriacou & Sutcliffe, 1977; Pratt, 1978). This research has often involved broad samples of teachers, but has also examined aspects of stress in organisational or demographic sub-groups such as primary, secondary and specialist schools, and intensive case studies of single or small numbers of schools, graduate teachers and head teachers (Kyriacou, 1987, 1998; Kyriacou & Sutcliffe, 1978b). In Australia, there have been a number of investigations into teacher stress over an extended period, which have involved thousands of teachers in both government and independent schools across most states (AISQ, 2003; APRG, 1990; Punch & Tuetteman, 1996). In Victoria, concerns over stress-related issues led to major government-sponsored inquiries into stress amongst teachers (APRG, 1990), and school principals and assistant principals (DE&T, 2004d).

STRESS DEFINITIONS
The use of stress to describe hardship or adversity derived initially from the engineering concept of stresses and strains (Cox, 1978; Lazarus, 1993) which treated stress as a stimulus. A stress was a force which operated on a person who strains themselves in dealing with it (Cox, 1978) or “an external load or demand on a biological, social or psychological system” (Lazarus, 1993, p. 2). The identification of stress as a response developed from the extensive biological work of Selye (1976; see also: Lazarus, 1993; Lazarus & Folkman, 1984; Otto, 1986; Patmore, 2006). Selye (1976) originally described stress as a set of physiological responses to stressors (threats to health or well-being) activating various organs of the body, which, if they continued over a period of time, weakened the body’s defences. He defined stress as “the nonspecific response of
the body to any demand” (p. 63), an everyday phenomenon, as reflected in the title of his book, “The stress of life” (1976).

Later in his research (Lazarus, 1993), Selye recognised that the stress reaction may be provoked by psychological as well as physiological factors, and was often accompanied by a range of identifiable emotional responses such as anxiety, anger, irritation, depression and inability to concentrate (Selye, 1976). He also differentiated between distress (negative stress), stress which exceeded an individual’s ability to cope and was associated with negative feelings, and eustress (positive stress) associated with positive feelings, a normal part of human behaviour which energises, motivates and provokes the individual to higher levels of achievement (Bernard 2000; Coon, 2001; Otto, 1986; Selye, 1976). Eustress, if too intense and overwhelming, becomes distress and can cause physiological and behavioural damage (Bernard, 1990, 2000; Selye, 1976). The use of eustress has led to some definitional confusion over the nature of psychological stress and its relationship to physiological stress (Cole & Walker, 1989; Lazarus, 1993, 1999; Patmore, 1976). Most educational researchers into psychological stress now distinguish it through its negative emotional characteristics (distress) to avoid confusion with potential causes of this distress (stressors), although some stress management texts still refer to the benefits of limited amounts of stress in providing more motivation, energy, concentration and creativity (Holmes, 2005; Mills, 1995). Humphrey and Humphrey (1986) noted that teachers themselves mostly associated stress with pressure, tension, and frustration, perceiving few positive aspects.

Since the term was brought into the social sciences in 1950s and 1960s (Otto, 1986) there have been numerous definitions of stress, sometimes confusing and inconsistent (Bernard, 1990; Humphrey & Humphrey, 1986; Lazarus, 1993; Patmore, 2006). The degree of confusion over psychological stress in particular has even led Patmore (2006) to question its validity as a concept, as being “too vague to be useful” (p. 30), whose overuse has led to inappropriate stress management interventions and created emotional dependence. She suggested that stress should only be applied to the physiological fight or flight stress response to threat (Patmore, 2006).

Stress has been viewed variously as physiological or psychological, as a level of demands, a lack of fit between person and environment, and as an emotional state
Bernard, 1990; Cox, 1978; Gold & Roth, 1993; Kyriacou, 1998; Kyriacou & Sutcliffe, 1977). Most definitions have involved some causal agent, subjective evaluation by mind or physiological system distinguishing threatening from benign stimuli, coping processes to deal with demands, and a complex pattern of effects (Lazarus, 1993). Approaches to psychological stress have mostly involved regarding stress as a stimulus characteristic of the environment (from engineering models), as a response pattern within the individual (from medical models) (Cox, 1978; Kyriacou & Sutcliffe, 1978a), or as a transactional process (Lazarus & Folkman, 1984). Process models now predominate, although the measurement of stress, especially in education, has often involved an implied narrower definition in terms of negative emotional states. The stressors and strain approach, which has dominated occupational health studies (Cotton & Hart, 2003; Hart & Cooper, 2001; Patmore, 2006), assumes that the psychological or physical ill-health of an employee (strain) occurs as a result of “work-related characteristics, events or situations” (stressors) (Hart & Cooper, 2001, p. 94), with most research looking for sources and moderating factors (Hart & Cooper, 2001; Patmore, 2006).

TRANSACTIONAL THEORIES OF STRESS

Most theories or definitions of psychological stress developed since the 1960s have involved some process of transaction between person and environment, involving adjustment or adaptation to external demands or a tension-producing situation, or a striving for homeostasis (Bernard, 1990; Cox, 1978; Hart & Cooper, 2001; Kyriacou & Sutcliffe, 1978a; Lazarus & Folkman, 1984; Ostell, 1998; Otto, 1986; Thompson & Williams, 1995). In this view, it is neither the stimulus nor the response but the relationship between them which defines stress: “psychological stress is a particular relationship between the person and the environment that is appraised by the person as taxing or exceeding his or her resources and endangering his or her well-being” (Lazarus & Folkman, 1984, p. 19). Cox (1987) suggested that stress is a “psychological state which derives from the person’s appraisal of their adaptation to the demands which are made of them” (p. 6), the perception of an imbalance between demands and capability. Models for stress as a broad transactional process have been mostly based on the work of Lazarus and colleague (Lazarus, 1989, 1993, 1999; Lazarus & Folkman, 1984) and their cognitive-mediational theory’s formulation of the roles of appraisal and coping.
The assumption of stress occurring as part of a transaction is widely accepted in educational research. For example, Gold and Roth (1993) described stress as “a condition of disequilibrium within the intellectual, emotional and physical state of the individual” (p. 17), resulting from a complex five-stage transaction between person and environment (demands, appraisal, adaptive responses, consequences and feedback). Many educationally-based definitions refer to stress arising from a perception of a mismatch between internal resources and external demands (Bernard, 1990, 2000; Capel, 1989; Otto, 1986). This mismatch is manifested in feelings of imbalance and inability to cope, of resources being exceeded and well-being endangered (APRG, 1990; Freeman, 1989; Kyriacou, 1989; Kyriacou & Sutcliffe, 1977, 1978a; Mathison & Freeman, 2006). It has also been pointed out that stress can occur through low demands or in the absence of demands (Kyriacou, 1998; Walsh, 1998).

**Cognitive-mediational theory**

The dominant process theory of stress since the early 1980s has been the cognitive-mediational (cognitive-relational) approach (Hart, 1994; Hart & Cooper, 2001; McCarthy et al., 2006; Shelley & Pakenham, 2004), developed by Lazarus and colleague (Lazarus, 1993, 1999; Lazarus & Folkman, 1984). This view of stress emphasises the importance of the roles of coping and appraisal in the process of managing the environment to maintain well-being (Grant & Hill, 2006; Hart & Cooper, 2001; Lazarus & Folkman, 1984). It is this “evaluative process that determines why and to what extent a particular transaction or series of transactions between the person and the environment is stressful” (Lazarus & Folkman, 1984, p. 19). Appraisal determines what emotions are felt. It involves constant evaluation of the environment in terms of personal well-being; monitoring conditions as harmful or beneficial, and calculating between demands, constraints and resources, and the goals and beliefs of the individual (Cox, 1978; Hart & Cooper, 2001; Lazarus, 1993, 1999; Lazarus & Folkman, 1984; Webb, 2006). Appraisal and re-appraisal are constantly recurring, forming a cognitive feedback loop in concert with coping mechanisms and success or failure to meet demands (Hart, 1998; Kyriacou & Sutcliffe, 1978a; Lazarus & Folkman, 1984; Webb, 2006).
This theory differentiates between primary and secondary appraisals. Primary appraisal involves deciding the relevance, positivity or threat of a situation (Coon, 2001). In the case of psychological distress, there are three different primary appraisals: harm, threat or challenge (Lazarus, 1993, 1999), as distinct from positive appraisal as a benefit. Harm and threat refer to damage or loss that has already occurred, or that has not occurred but is likely to occur, while challenge is the appraisal that difficulties exist but may be overcome. Threat and challenge can occur at the same time (Lazarus, 1993, 1999). Secondary appraisal involves “what can I do?” (Lazarus & Folkman, 1984, p. 157) It means assessing resources and choosing a coping strategy to address the threat or challenge (Coon, 2001), and determining its ongoing management. Secondary appraisals take into account coping strategies and determine the level of stress and emotional reaction (Lazarus & Folkman, 1984). This reaction is dependent on personal meaning for the individual including previous experience, expectancies, resources, constraints and level of commitment (Lazarus & Folkman, 1984). In this model, reappraisals from interaction with the environment and internal states lead to an adaptive outcome. Physical, psychological and social resources are not buffers to stress but “factors that precede and influence coping, which in turn mediates stress” (Lazarus & Folkman, 1984, p. 158).

The concept of coping, which preceded transactional models, is integral to the cognitive-mediational approach (Lazarus & Folkman, 1984). Coping involves attempts to alter the circumstances or interpretation of an unfavourable relationship (Lazarus, 1993). It is “a person’s ongoing efforts in thoughts and actions to manage specific demands appraised as taxing or overwhelming” (Lazarus, 1993, p. 8), with the aim of preventing or controlling emotional distress (Otto, 1986), regardless of effectiveness or value (Lazarus & Folkman, 1984). Coping can be both cognitive and behavioural. It is constantly changing in response to context and mediated by appraisals and reappraisals (Lazarus & Folkman, 1984). In this model, daily hassles are considered a better predictor of daily health than major life stressors (Coon, 2001; Lazarus & Folkman, 1984). Hassles are micro-stressors, everyday annoyances which are perceived as threatening or harmful and cause distress, which are countered by daily uplifts which sustain and replenish resources (Coon, 2001; Rathus, 1990; Rogers, 2002). Stress occurs when hassles accumulate until the individual can no longer cope (Lazarus & Folkman, 1984). What determines the perception of a hassle or uplift “depends on the baseline
conditions of life” (Lazarus & Folkman, 1984, p. 313), and the dynamic interaction of appraisal and coping processes (Lazarus & Folkman, 1984).

Dynamic equilibrium theory
The dynamic equilibrium theory of occupational stress, developed by Hart and colleagues (Cotton & Hart, 2003; Hart & Cooper, 2001; Hart et al., 1995; Hart & Wearing, 1995), underpins the construction of stress in the SOS. Forming part of a larger organisational health model, it questions whether stress under the cognitive-mediational approach is an objective characteristic of the environment, a subjective interpretation, or a psychological response (Hart & Cooper, 2001). The theory integrates the cognitive-mediational model of stress with perceived quality of life (subjective well-being) literature within a transactional stress framework (Hart, 1994; Hart & Cooper, 2001; Hart & Wearing, 1995). It depicts stress as a “state of disequilibrium” (Hart & Cooper, 2001, p. 98) and “the outcome of a system of variables” (Hart & Wearing, 1995, p. 186). In this model, organisational characteristics interact with individual characteristics in a feedback loop, which brings about a change in normal well-being (Hart & Cooper, 2001; Hart & Wearing, 1995).

Stress is operationalised in this model as the experience of unpleasant feelings or emotions arising from work, such as anxiety, depression, anger, frustration and tension (Hart, 1994; Hart & Cooper, 2001; Hart & Wearing, 1995). This is a response-based definition which has been commonly used in education (e.g. Kyriacou & Sutcliffe, 1978a). Stress is represented in the SOS through the dimensions of individual distress and school distress, negative emotions occurring as a perception of individual feelings or of qualities exhibited by staff. The theory contests the view that stress and morale (positive affect) are part of a bipolar continuum (Hart et al., 1995; Hart & Wearing, 1995), so that “stress is associated with unpleasant feelings that are experienced at the expense of more pleasurable emotions” (Hart, 1994, p. 129). It suggests, following Bradburn’s (1969) theory of emotions, that stress and morale are qualitatively different, independent dimensions which occupy separate positive and negative affective paths and contribute equally to overall quality of life (Hart, 1994; Hart & Cooper, 2001; Hart et al., 1995, 2000; Hart & Wearing, 1995). The model assumes that positive experiences are unrelated to distress, and negative experiences unrelated to morale (Hart, 1994).
The implication of this theory is that the occurrence of stress would not necessarily result in an absence of well-being (Hart & Cooper, 2001). Levels of stress and morale can be high or low simultaneously (see Fig. 1), though high stress and high morale may result in burnout (Hart, 2000). The theory is backed by extensive quantitative research collected by Hart and his colleagues in education (Hart, 1994, 2000; Hart & Cooper, 2001; Hart et al., 2000), as well as in other professions such as the police force where they found there was “no significant relationship between organizational hassles and uplifts” (Hart et al., 1995, p. 143), meaning officers could experience satisfaction and dissatisfaction at the same time. The theory questions the assumption that reducing distress alone will improve quality of work life for teachers, and suggests well-being research needs to examine both positive and negative experiences at the same time in order to fully understand responses to work (Hart, 1994, 2000; Hart et al., 2000).

Hart and colleagues (Cotton & Hart, 2003; Hart et al., 1995) also argued that research into stress needed to change focus from the individual to the organisation and the adaptation of the working environment. They observed that most teacher stress research concentrated on individual experiences and perceptions separated from their organisational context, yet reported stress as originating from and more influenced by organisational characteristics (Cox et al., 1989; Hart, 1994; Hart et al., 1995). For example, Cotton and Hart (2003) noted that, after personality, the greatest contributor to distress amongst both police officers and teachers was organisational climate, indicating that it is a more important factor in distress than adverse work experiences. A broader organisational health approach to stress in education would go beyond just dealing with time pressures and student misbehaviour to look at the whole system, for example, giving feedback and opportunity for professional development (Hart, 1994, 2000). It would appreciate that “to some extent, stress is a necessary and inevitable part of work life” (Hart, 2000, p. 12), echoing Selye’s (1976) earlier research. This approach to stress underlies the SOS model.

**Understandings of stress in education**

Most educational researchers (e.g. Gold & Roth, 1993; Hayes, 2006; Otto, 1986) have followed the cognitive-mediational theory’s emphasis on stress as it affects the individual, focusing on the concept of stress alone, rather than the overall organisational approach suggested by the dynamic equilibrium theory. The most commonly used
definition of stress applied to teaching has derived from Kyriacou and Sutcliffe (1978a), who in principle adopted the transactional framework and the cognitive-mediational emphasis on appraisal and coping, but in practice defined stress more narrowly in terms of negative emotional characteristics with associated physiological, cognitive, and behavioural symptoms. They defined stress as:

a response of negative affect (such as anger or depression) by a teacher usually accompanied by potentially pathogenic physiological and biochemical changes . . . resulting from aspects of the teacher’s job and mediated by the perception that the demands made upon the teacher constitute a threat to his self-esteem or well-being and by coping mechanisms activated to reduce the perceived threat (Kyriacou & Sutcliffe, 1978a, p. 2).

Kyriacou (1981, 1989, 1991, 1998, 2001) simplified this definition to “when teachers feel angry, depressed, anxious, nervous, frustrated or tense as a result of their work as teachers” (1991, p. 136), which is how stress is operationalised in the SOS. This view of psychological stress as primarily an unpleasant emotional state or distress, resulting from an inability to deal with demands is shared by most researchers, describing feelings such as tension, anger, anxiety, fear, helplessness, depression, powerlessness, nervousness, guilt, frustration, low self-esteem and bitterness (Bernard, 1990; Cole & Walker, 1989; Mathison & Freeman, 2006; Rogers, 1992).

Distress is generally thought to be associated with cognitive symptoms, as “emotional and cognitive stress reactions go hand-in-hand” (Bernard, 2000, p. 234), such as poor memory, confusion, lack of concentration and negative self-image, as well as physiological effects including fatigue, headaches and lack of appetite (Bernard, 2000; Brown & Ralph, 1998). Distress in teachers may also be manifested in behavioural changes such as reduced teaching performance, increased absenteeism and lateness, problems with time management, social withdrawal, hostility, and lack of co-operation (Bernard, 1990; Brown & Ralph, 1998). Stress is widely understood to be a subjective state or individual experience (Cole & Walker, 1989; Hart & Cooper, 2001; Hayes, 2006; Kyriacou, 1989; Otto, 1986). It is “the meaning of the event, rather than the event itself, [which] determines our reactions” (Hayes, 2006, p. 39). This means that the perception of potential stressors varies between individuals and what creates stress in one person may not affect another in the same way.
Where prolonged or severe stress exceeds a person’s ability to cope, it can damage a person’s health and well-being, evident in the phenomenon of physical, mental and emotional exhaustion or burnout (Bernard, 1990; Dworkin, 2001; Edmondson, 2006; Esteve, 1989; Kyriacou, 1987, 1989, 2001; McCarthy et al., 2006). Burnout is characterised by feelings of disillusionment, cynicism, isolation, rejection and helplessness, as well as loss of commitment, purpose, accomplishment and enthusiasm (Bernard, 1990; Dworkin, 2001; Esteve, 1989; Gold & Roth, 1993; Kyriacou 1989; Otto, 1986). Individuals feel emotionally drained, have low self-esteem, and blame those they deal with for their own lack of accomplishment (Dworkin 2001; Geldard & Geldard, 2005; Gold & Roth, 1993). Burnt-out teachers lose interest and motivation, and stop valuing their work (Holmes, 2005; McCarthy et al., 2006). As burnout increases, the lack of engagement becomes a coping mechanism of avoidance, which in turn reduces stress, but at the cost of achievement (Dworkin, 2001). Burnout in education has been attributed to factors such as materials and working conditions, student behavioural issues, teacher exhaustion, increasing work demands, and lack of support (APRG, 1990; Esteve, 1989; Gold & Roth, 1993).

FACTORS AFFECTING EXPERIENCE OF STRESS
This section describes factors affecting experience of stress, including personality and related characteristics such as locus of control and resilience, as well as provision of support, and what types of coping strategies are used.

**Personality traits and types**
It is accepted that individual characteristics impact markedly on the experience of stress (Brown & Ralph, 1998; Gold & Roth, 1993; Kyriacou, 1998, 2001) because stress responses are subjective, a result of unique perceptions, which helps explain why “two people doing the same job can react in opposite ways to a shared occupational stressor” (Ford, 2004, p. 24), and why some people are better able to resist stress than others (Holmes, 2005). The most influential of these individual characteristics is thought to be personality (Cotton, 1995; Ford, 2004; Hart, 2000; Hart & Cooper, 2001; Hart et al., 1995; Hart & Wearing, 1995; Travers & Cooper, 1998), impacting on appraisal, coping and locus of control (Hart & Cooper, 2001).
Personality refers to an individual’s relatively stable and predictable qualities and behaviour patterns (Bernard, 2000; Coon, 2001). Two main approaches to personality are type theory, examining shared elements of behaviour, and trait theory, looking for differentiating aspects of behaviour (Reber, 1995). The major type theory associated with experiences of stress has been Friedman and Rosenman’s distinction between Type A and B personalities (Brown & Ralph, 1998; Cox, 1978; Humphrey & Humphrey, 1986; Lazarus & Folkman, 1984). People with Type A personality, regarded as more stress- and coronary-prone, are characterised by intense drive, competitiveness, multi-tasking, high work rate and alertness (Cox, 1978), together with absolutist thinking, rigidity, emotionality, self-focus and perfectionism, which are thought more likely to generate stress emotions such as anger (Cotton, 1995; Jackson & Clements, 2006; Ostell, 1998).

Trait theories of personality, which now predominate (Coon, 2001; Rathus, 1990; Reber, 1995), generally accept that there are five basic personality factors which are particularly stable and invariant (Goldberg, 1990; Hart et al., 1995). These factors are introversion or extraversion (surgency), agreeableness, conscientiousness (dependability), emotional stability or instability (neuroticism), and culture (intellect or openness) (Coon, 2001; Goldberg, 1990; Hart & Cooper, 2001; Rathus, 1990). Of these factors, neuroticism has been found to have a strong positive correlation with negative affect (or stress) and extraversion with positive affect (or inversely with stress) (APRG, 1990; Diener, 1984; Hart, 1994, 2000; Hart & Cooper, 2001; Hart et al., 1995). Neuroticism is “a person’s tendency to focus on the negative aspects of themselves and his/her environment” (Hart & Cooper, 2001, p. 104) and to worry (Cotton & Hart, 2003), whereas extraversion refers to an individual’s positive outlook and propensity for social interaction (Hart & Cooper, 2001), to be “people-oriented, sociable and engaging” (Cotton & Hart, 2003, p. 121). Individuals prone to neuroticism are thought to react more negatively to life events, have higher levels of anxiety, distress and daily hassles, and are more likely to transfer stressors between workplace and personal life, while extraversion is more likely to contribute to uplifts (Ford, 2004; Hart et al., 1995). Amongst other biographical characteristics, there is some evidence of higher stress levels in older workers (Jackson & Clements, 2006), including teachers over the age of 45 (Holmes, 2005), and of women reporting higher levels of demands and distress than men (Hart et al., 1995; Humphrey & Humphrey, 1986; Macklin et al., 2006).
Locus of control and resilience

Two personality-related factors, locus of control and resilience, have been thought to be significant mediating factors in experiences of stress. Rotter’s locus of control theory (Capel, 1988; Lazarus & Folkman, 1984; Otto, 1986; Rogers, 1992; Shelley & Pakenham, 2004; Vézina & St-Arnaud, 1995), conceptualises the degree of individual appraisal of autonomy or control through its perceived source, whether the power to control one’s world, and therefore determine success or failure, is believed to lie within the individual (internal locus) or outside (external locus) (Lazarus & Folkman, 1984; Otto, 1986; Reber, 1995; Spector et al., 2001). People with an internal locus of control seem to find the workplace less hostile, experience lower stress levels, and cope better (Bernard, 1990; Freeman, 1989; Holmes, 2005; Travers & Cooper, 1998). People who feel they have control over their lives tend to see potential stressors as challenges rather than threats and carry positive self-worth into stressful situations (AISQ, 2003; Bernard, 1990; Travers & Cooper, 1998). Kyriacou and Sutcliffe (1979a) found a positive correlation between teacher self-report of stress and belief in external locus of control. Locus of control is influenced by the degree of autonomy or control of work of an employee, and the consequent feeling of being able to manage particular occupational demands (Cox et al., 1989; Ford, 2004; Macklin et al., 2006). The Demand Control Support (DCS) model of work stress (Macklin et al., 2006) suggests that high strain work or job stress occurs where demands are high, support low and control low (or constraints high) (Fletcher & Payne, 1982; Macklin et al., 2006; Walsh, 1998). Locus of control has also been linked with self-efficacy, a person’s belief in their own ability to bring about change, depersonalise issues, and not engage in self-blame (Bernard, 1990; Lazarus & Folkman, 1984; Perry & Ball, 2008; Rathus, 1990).

The quality of resilience (Pianta & Walsh, 1998; Stanley et al., 2005) is used to refer to factors which seem to help or hinder individual capacity to deal with stressors or stress, particularly the willingness and persistence in carrying things through, and to adapt and succeed in the face of ongoing, challenging experiences. Developing greater resilience is seen as a way of managing stress (Hayes, 2006; Holmes, 2005), with many workplaces having introduced emotional resilience programs as part of stress prevention (Jackson & Clements, 2006). A related concept, Kobasa’s psychological hardiness (Rathus, 1990) refers to the provision of buffers against stress, social support and effective coping mechanisms.
Support
The availability of personal and professional support has been regarded as a key indicator of occupational stress, as well as a crucial element in how individuals cope with stress and mitigate its effects (Cox et al., 1989; Ford, 2004; Gold & Roth, 1993; Hayes, 2006; Jackson & Clements, 2006; Kyriacou, 1991; Macklin et al., 2006; Tindle, 2006). Effective support has been widely documented, particularly by Rogers (1992, 2002), who worked extensively with staff in Victorian schools. Support for teachers can come from a range of sources, including other colleagues, the administration and external agencies; and can take a variety of forms, such as physical resources, direct or indirect help in dealing with a problem, feedback, praise and acknowledgement, emotional support, empathy, or simply just someone with whom to talk (Bernard, 1990; Hayes, 1995; Holmes, 2005; Mills, 1995; Punch & Tuetteman, 1996; Rogers, 1992, 2002). Social support has been found to be particularly significant in ameliorating stress because of its emotional and affiliative functions (Bernard, 1990; Kyriacou, 1987, 2001; Macklin et al., 2006; Rogers, 2002; Vézina & St-Arnaud, 1995), emphasising that attachment to a social network is important to life (Lazarus & Folkman, 1984). Kyriacou (1981) noted the benefits of social support to teachers in providing advice, sympathy and understanding, helping to solve problems, get worries back into perspective, and relieve tension through venting and humour.

Because social withdrawal itself is a behavioural sign of stress (Gold & Roth, 1993; Travers & Cooper, 1998), it has been observed that teachers with higher levels of stress tend to find it more difficult to relate to other people and therefore to obtain help (Hayes, 2006; Holmes, 2005). Effective colleague support can therefore become doubly important in overcoming the “culture of reluctance and isolation that feeds the stress dynamic” (Rogers, 1992, p. 24), by fulfilling a need for belonging in what has traditionally been a solitary, individualistic and sometimes lonely profession (Bernard, 1990; Hayes, 2006; Rogers, 2002). There have been various findings about how support is used. Bernard (1990) found that support from the peer group was more important for teachers than support from the administration. Punch and Tuetteman (1996) found that colleague support was more important for male teachers, and praise and recognition for females, yet Skues and Kirkby (1995) reported that women teachers were more involved in social networks, and in providing and utilising social support. It should be noted that not all social interaction is positive and protective. Negative social behaviour
may increase stress and affect school climate (Bernard, 1990; Brown & Ralph, 1998). In some schools with poor staff relations and an unsupportive environment (Hayes, 2006), “teachers do not speak to each other, and will not even stay in the staff-room at the same time unless they absolutely have to” (p. 51).

**Coping behaviours**

The significance of coping strategies and behaviours in dealing with stress is broadly accepted (APRG, 1990; Cox et al., 1989; Hayes, 2006; Mills, 1995). These coping strategies can be positive or negative in terms of their impact in reducing stress (APRG, 1990) and may involve cognitive, emotional, social, spiritual and physical resources (Hayes, 2006). Lazarus and Folkman (1984) made an important distinction between problem-focused and emotion-focused coping which is generally accepted by texts discussing management of stress (Freeman, 1989; Kyriacou, 1987, 1991, 1998, 2001; Otto, 1986). Problem-focused coping involves dealing with stressors through direct action, by managing or altering the problem causing distress (Lazarus & Folkman, 1984). On the other hand, emotion-focused (palliative) coping strategies are aimed at reducing the impact of stressors on emotional responses, through avoidance or minimisation, in order to relieve tension or boost morale (Lazarus & Folkman, 1984).

Lazarus and Folkman (1984) suggested that emotion-focused coping, a form of cognitive re-appraisal, tends to be adopted when a situation is perceived as not amenable to change, otherwise problem-focused coping will predominate. Most people use a range of coping strategies in any given encounter, depending on the context and their effectiveness (Lazarus, 1993). Neuroticism and hassles are associated more with emotion-focused coping and extraversion, and uplifts with problem-focused coping (Ford, 2004; Hart et al., 1995). Colleague support is an important emotion-focused coping technique, but can also involve problem-focused coping (Kyriacou, 1981). Skues and Kirkby (1995) suggested that female secondary teachers used more emotion-focused coping techniques than males. Stress management texts have highlighted the importance of adaptive, problem-focused coping in effective, long-term stress reduction (Gold & Roth, 1993; Hayes, 2006; Mills, 1995), but have usually provided a wide range of possible approaches, reflecting an understanding that the individuality of stress means that what will work for one person will not work for someone else.
Stress management

There have been numerous stress management publications giving advice to individual teachers on how to avoid and cope with stress (Bernard, 1990; Dunham & Varna, 1998; Gold & Roth, 1993; Hayes, 2006; Holmes, 2005; Humphrey & Humphrey, 1986; Mills, 1995). Suggested strategies have included cognitive and behaviour modification (such as developing more self-confidence, challenging irrational beliefs, overcoming procrastination and improving resilience), lifestyle changes (exercise, recreation, relaxation and diet), and recognising physical and emotional warning signs of stress (such as changes in motivation, mood and energy levels). Teachers have been advised to improve time management and prioritisation, keep problems in perspective, strengthen social support networks and communication skills, reduce non-work life stressors, and develop specific classroom management techniques such as learning to deal with conflict (Bernard, 2000; Holmes, 2005; Humphrey & Humphrey, 1986; Kyriacou, 2001; Mills, 1995). Walsh (1998) suggested that an individual approach to stress should involve identification of possible sources of stress, deciding the level of control and adopting a problem-solving approach, while Gold and Roth (1993) emphasised the importance of communication.

A recent focus of stress management has been the identification, acknowledgement and control of emotions associated with stress (Gold & Roth, 1993; Goleman, 2004a, 2004b; Hayes, 2006; Holmes, 2005; Kyriacou, 2001; Mills, 1995). The work of Goleman (2004a, 2004b) on emotional intelligence has contributed significantly to the view that controlling personal impulses and reading emotions in others is a key to success in life, and in highlighting the neurological basis of emotions in determining behaviour. Goleman (2004a) observed that the emotional brain drives behaviour as “passions overwhelm reason time and again” (p. 5). Emotional reactions repeat and reinforce themselves (Crowe, 2005; Damasio et al., 2000; Goleman, 2004a), and negative emotions in particular can be contagious (Geldard & Geldard, 2005; Goleman, 2004a, 2004b), spreading easily from one person to another within a social group, and impacting on levels of organisational health (Beatty, 2007; Hayes, 2006).

The understanding and management of negative emotions, especially anger and anxiety, is regarded as key to developing emotional mastery (Bernard, 2000; Humphrey & Humphrey, 1986; Ostell, 1998; Perry & Ball, 2008). This has led to rational-emotive
imagery where “people spontaneously come up with a variety of ways they can gain control over their feelings” (Bernard, 2000, p. 101). Perry and Ball (2008) observed that teachers with high emotional intelligence feel more in control, are better at accepting feedback, have higher levels of self-efficacy, and are more reflective. Gold and Roth (1993) suggested that emotional management for teachers also involved ensuring positive emotional needs are met, such as security, self-esteem, and being respected by students.

Aside from an individual focus, organisational strategies used to mitigate workplace stress have included performance feedback, conflict management and grievance handling, encouraging teamwork, collaboration and co-operation, dealing with critical incidents, and improving communication (Jackson & Clements, 2006; Vézina & St-Arnaud, 1995). Recently there has been a greater emphasis on a preventative hazard management approach to potential stress issues, together with timely reaction and rehabilitation (Cotton, 2008; Ford, 2004; Walsh, 1998). A number of researchers have suggested a whole-school approach to perceived stress-related organisational factors, such as reducing role conflict and ambiguity, improving staff communication, increasing recognition and ameliorating work demands (Dunham & Bath, 1998; Kyriacou, 1987; Travers & Cooper, 1998), is required, facilitating mutually caring communities (Kyriacou, 1991). It has been observed that stress levels seem to be lower in well functioning schools with good leadership (Bernard, 1990), which accords with most models of organisational climate.

STRESSORS

Environmental factors resulting in occupational stress have been thought to include work pressure and demands, exposure to traumatic events and violence, workplace harassment, conflict between colleagues, and lack of autonomy and support (Ford, 2004; Jackson & Clements, 2006). These factors can vary in intensity and frequency from an isolated major stressor to a series of more minor regular stressors (Foreman & Murphy, 1995) or daily hassles (Rathus, 1990). There has been considerable research into factors causing teacher distress (Hart, 1994), with stressors in education seeming to parallel general occupational stressors, along with job-specific and external factors. General occupational stressors affecting teachers have been reported to include workload, time pressure, working conditions, colleague relationships, role conflict and
ambiguity, leadership style, poor communication, negative community attitudes, and constant change, together with stressors specific to teaching such as classroom discipline and lack of educational resources (AISQ, 2003; Bernard, 1990; Brown & Ralph, 1998; Gold & Roth, 1993; Hayes, 2006; Kyriacou, 1991, 1998, 2001; Kyriacou & Sutcliffe, 1977; Mills, 1995). Teachers also reported being affected by stressors external to work such as lack of personal fulfilment, relationship problems, poor living conditions, and health and financial pressures (Gold & Roth, 1993; Kyriacou & Sutcliffe, 1977). Stressful situations for teachers have been grouped into training and career development, nature of work, physical work environment, school organisation, and school and community relationships (Cox et al., 1989) or, alternatively, into “pupil recalcitrance, time and resource difficulties, professional recognition needs and curriculum demands” (Laughlin, 1984, p. 18).

The apparent impact of stressors on individual staff is strongly dependent on subjective reactions, and differences in context and measurement (Kyriacou, 1987, 1998; Kyriacou & Sutcliffe, 1978b). Researchers have therefore drawn different conclusions about sources of stress within schools. For example, Kyriacou (1987) and Bernard (1990) found that work and time demands were major stressors for teachers, and that stress levels were likely to be lower when time and workload pressures were seen as “fair and equitable” (Bernard, 1990, p. 14), however, Hart (2000) argued that “increased workloads do not necessarily lead to increased stress” (p. 42), depending on the nature of the workload. Bernard (1990) reported that classroom management issues were also significant causes of stress for teachers, but Hart (2000) and Kyriacou (1987) questioned the importance of disruptive student behaviour as a stressor, regarding poor student attitude as a more important factor. Pratt (1978) concluded that the home background of students, associated with “increasing non-co-operation and aggression” (p. 9) as they grew older, was the major cause of stress for primary teachers. Kyriacou and Sutcliffe (1978b) found no association between biographical characteristics of teachers and sources of stress, but Laughlin (1984) found biographical mediators were influential in stress factor perceptions, with younger, female teachers focusing more on pupil misbehaviour, and older men on curriculum, time demands and recognition.

Change, a constant in education, is thought to be a potential stressor (Kyriacou, 2001), particularly when it is externally imposed (Bernard, 1990), because it requires
adaptation which uses up energy (Mills, 1995). Moves to mandated testing linked to school accountability have been observed as contributing to raising teacher stress levels in some countries (Dworkin, 2001; Mathison & Freeman, 2006). Fullan (2008) suggested that implementation of change as part of school improvement is best carried out in collaboration with teachers, rather than imposed on them.

There have been two inquiries into stress and well-being of staff in Victorian government schools, focusing on teaching staff (APRG, 1990) and the principal class (DE&T, 2004d). The investigation into teacher stress found that the major stressors for teachers were staff relations, excessive workload and school administration, along with classroom-related stressors and, to a lesser extent, government demands and self-appraisal. The study particularly noted the negative impact of staff factions and interpersonal conflict: “hell is other teachers” (APRG, 1990, p. 29). It suggested that primary teachers seemed happier with life than secondary teachers. The report concluded that the main problem areas in schools were “a lack of leadership, a lack of purpose and clarity of mission, and a lack of cohesion and mutual support” (APRG, 1990, p. 39), and that it was organisational climate which largely determined teacher stress arising from student behaviour and work pressures.

The study of the well-being of principals and assistant principals (DE&T, 2004d) was stimulated by concerns over the impact of “a decade of accelerated change” (p. 5). It found that working hours were considerably higher than in other comparable professional careers. Administrators regarded their jobs as highly stressful, though they also reported high levels of satisfaction (DE&T, 2004d), echoing Fletcher and Pratt (1982). The study concluded that major pressures on school leaders were weight of work demands, student welfare issues, and, most importantly, a perceived tension between their personal values as being carers with responsibilities to students, and the expectations placed on them as managers by the government (DE&T, 2004d).

MEASUREMENT OF STRESS
Most measurement of stress has come through some form of self-report of emotional state, potential stressors or coping strategies, and has been largely quantitative, ranging from single-item instruments to multiple-item inventories or surveys (APRG, 1990; Kyriacou, 1978b, 1987, 1998, 2001). All self-report measures are subject to
measurement difficulties (Kyriacou & Sutcliffe, 1977; Lazarus & Folkman, 1984), such as differences in respondent interpretation and lack of personal insight (Kyriacou & Sutcliffe, 1977), and measuring recollections or presumptions of actions rather than specific thoughts, feelings and actions (Lazarus & Folkman, 1984), but offer a rich source of information about the motivation of behaviour.

Early self-reports of stress mostly took the form of negative life event ratings scales to measure stressors as health hazards (APRG, 1990; Coon, 2001; Lambert et al., 2006; Patmore, 2006), such as the Social Readjustment Rating Scale of Holmes and Rahe, and its updates, widely referred to in texts on the psychology of stress (Cox, 1978; Mills, 1995; Otto, 1986; Rathus, 1990). These ratings scales make the assumption that a major life event (such as divorce) requires adjusting to change, which results in a degree of stress which can be measured in the form of life units and aggregated over a year (Coon, 2001; Otto, 1986; Rathus, 1990). Life event rating scales have been criticised for not recognising the complexity, individuality and subjectivity of stress, assuming change in itself is stressful, implying that positive life changes have the same impact as negative ones, and assuming that major life events are better indicators of stress than daily hassles (Lazarus & Folkman, 1984; Otto, 1986; Rathus, 1990). Measurement of stress is now usually carried out through questionnaires such as those examining generic occupational stress, including the Derogatis Stress Profile (DSP), measuring dimensions relating to “personality mediators, environmental events, and emotional responses” (Russell et al., 1995, p. 238), and the General Strain Index measuring frequent stress symptoms (Hart, 1994; Hart & Wearing, 1995). There are also a number of stress instruments specific to teaching such as Pratt’s (1978) Teacher Event Stress Inventory (TESI) and the Teacher Stress Inventory (Hart, 1994). Stressor inventories have been criticised for confounding environmental stimuli with psychological responses, therefore “making it difficult to know what is actually being measured” (Hart & Wearing, 1995, p. 203).

Overall measures of well-being or general health such as Goldberg’s General Health Questionnaire (GHQ) have also been used as indicators of distress (Fletcher & Payne, 1982; Macklin et al., 2006; Ostell, 1998; Pratt, 1978; Punch & Tuetteman, 1996; Russell et al., 1995), as well as scales within organisational climate or health surveys. Other surveys or self-response scales have examined various elements contributing to
the experience of psychological stress, either within the environment or within the individual. These have included measures of daily hassles and uplifts (Hart, 1994; Hart et al., 1995; Hart & Wearing, 1995), stresses and strains (Thompson & Williams, 1995), anxiety states (Kyriacou, 1987), coping resources (Hart et al., 1995; Hayes, 2006; Lazarus, 1993; Lazarus & Folkman, 1984), and locus of control (Kyriacou & Sutcliffe, 1979a; Rathus, 1990). Bernard (1990) provided a series of self-help, stress-related inventories for teachers covering irrational beliefs, teaching stressors, support, coping skills, and lifestyle. All these measures, whether examining job demands or coping resources, face the problem of dealing with different contexts (Kyriacou, 2001; Lambert et al., 2006).

There have been fewer qualitative studies of stress (Kyriacou, 1987, 2001), which has been attributed to problems of comparability (Kyriacou, 1987). Otto (1986) used interviews in her qualitative study of stress in Victorian teachers, while other investigations have used a mixed-method approach combining surveys with interviews, such as research into stress of Victorian teachers (APRG, 1990), or focus groups, such as a study of the principal class in Victoria (DE&T, 2004d).

STRESS SUMMARY

This section has described the development of theories of stress and outlined findings about causes of stress and its negative impact on teachers. Research into stress in education has been stimulated by reports of high stress levels in schools and its associated personal and financial costs. Stress was recognised firstly as a physiological phenomenon and later as a psychological cause of disease. Stress has been variously regarded as a cause, a response, and as a process. It has been usually defined through its negative characteristics (distress) but has sometimes been viewed as having potentially positive elements (eustress). Stress has generally been viewed as highly subjective. Stress in its extreme form can result in burnout, characterised by emotional exhaustion, alienation and withdrawal.

Most theories of stress now regard it as involving the complex interaction of individual and environment in response to perceived demands. The dominant cognitive-mediational theory of stress of Lazarus and Folkman (1984) emphasised the roles of appraisal and coping in an ongoing, dynamic process as the individual adapts to the
harm, threat or challenge. Psychological stress results from the experience of negative emotions such as fear or anxiety. The dynamic equilibrium theory of stress which underlies the SOS views stress as a state of disequilibrium. It integrates cognitive-mediational theory into an overall organisational framework of quality of life incorporating stress, morale and well-being. This model considers distress and morale to act independently in determining well-being. Stress is measured in the SOS through the experience of negative emotions, reflecting a widely-held approach to stress in education stemming from Kyriacou and Sutcliffe (1978a). Stress in the SOS is divided into two dimensions, individual distress and school (group) distress. These form two dimensions of the motivation grouping together with the two dimensions of morale (positive emotional experiences). The inclusion of the school distress dimension in the SOS implies that stress has both individual and group characteristics, which is contrary to most perceptions of stress as a highly subjective, individual phenomenon.

Research has identified factors in the experience of stress such as personality type (correlating positively with neuroticism and negatively with extraversion), an external locus of control, and low resilience. Support has been suggested as an important mediator of stress and coping resource. Major forms of coping have been categorised as problem-focused or emotion-focused, with stress management for teachers covering a wide range of approaches, including the control of emotions. Stressors for teachers vary depending on the individual, with researchers drawing different conclusions about the importance of work demands and classroom management. Most measures of psychological stress reactions, stressors (causes of stress) or coping have used self-report surveys or inventories.

The following section examines morale, which is the concept used in the SOS to distinguish the experience of positive emotions. The dimensions of school morale and individual morale act as a counterpoint to distress within the motivation grouping in the SOS.

**MORALE**

The concept of morale has received relatively little attention or systematic research when compared with studies of stress and organisational climate (Hart et al., 2000) and
there have been few investigations into teacher morale (Evans, 1997b, 1998; Hart, 1994). The term has not been clearly defined or operationalised (Evans, 1997b, 1998; Smith, 1976, 1987; White & Stevens, 1988), taking a variety of meanings as a synonym for fulfilling needs, personal adjustment, feelings about life, job satisfaction, organisational climate, or any work-related attitude (Coughlan, 1970; Evans, 1997b, 1998; Lazarus & Folkman, 1984; Lumsden, 1998), though most studies of morale have involved group-level characteristics such as cohesiveness, unity and group identity (Smith, 1976, 1987).

Much of the debate about morale has centred on its dimensions, the extent to which it is a group or individual phenomenon, and its relationship to satisfaction (Evans, 1998). Doherty (1988) and Evans (1997b, 1998) argued that morale is essentially an individual characteristic, Hart (1994) differentiated between individual and group morale, while Mackenzie (2007) identified three connected forms of teacher morale: personal morale (individual circumstances such as health and family), school morale (daily experiences of teaching), and professional morale (relating to teaching as a career). The most common use of morale in education has been as a general label to indicate the perceived level of confidence, satisfaction and optimism of teachers as a group within a particular school or educational system, particularly when it is perceived to be low or declining (AISQ, 2003; Gold & Roth, 1993; Mackenzie, 2007).

THEORIES OF MORALE

The focus on morale as a group-level phenomenon originated from its use as a military term to describe levels of confidence amongst groups of soldiers (Patmore, 2006; Richardson, 1978). Richardson (1978) identified military morale as having three elements: personal morale, group morale, and unit morale or esprit de corps, which were all strongly dependent on quality of leadership. The wartime environment requires soldiers to put loyalty to comrades ahead of self-preservation while under intense physical and psychological pressure, making unity and conformity paramount (Richardson, 1978). Morale in organisational studies has usually been used to describe levels of group cohesiveness or harmony (Hoy & Sabo, 1998; Locke, 1976), aggregated through individual perceptions as a group output or achievement (Smith, 1976). This has involved indicators of unity or how well a group is working together and levels of individual confidence (Evans, 1997b, 1998; Smith, 1987). Smith (1966, 1976, 1987)
and Coverdale (1975) identified elements of high morale as goal striving and persistence, pride in the group, enthusiasm and energy, and co-operation and cohesion. In contrast, low morale is displayed through a lack of group cohesion, reduced enthusiasm and energy, and individuals not contributing to or sharing in the group’s achievements, putting personal interests above those of the group (Coverdale 1975; Smith, 1987).

Many definitions of morale have included a future-oriented or anticipatory element (Evans, 1997b, 1998; Guba, 1958; Locke, 1976), reflected in an individual or group’s positive attitude towards future tasks. For example, Smith (1966) defined morale as “a forward-looking and confident state of mind relevant to a shared and vital sense of purpose” (p. 143). A number of definitions of morale have also included a needs-based component (Evans, 1997b, 1998; Coughlan, 1970; Guba, 1958). Coughlan (1970) described morale as the extent to which individual needs have been satisfied; given that this satisfaction derives from a person’s work. Guba (1958) and Evans (1997b, 1998) refuted the argument that morale as work satisfying needs is not clearly distinguishable from job satisfaction (Locke, 1976) by emphasising its temporal nature and suggesting that morale is the expectancy, or anticipation, of future job satisfaction. Evans (1997b, 1998) described morale as dynamic, forward- and future-oriented, and job satisfaction as static, shallow, responsive, current, comparative and present-oriented. Guba (1958) further suggested that the extra energy required of an individual to expend in the pursuit of group objectives, a characteristic of high morale, would not be available if the individual was involved in unsatisfying work.

Some constructions of morale, such as that found in the SOS, have been based more exclusively on its emotional elements (Hart, 2000; Lazarus & Folkman, 1984). Richardson (1978) recognised that morale was “an emotionally conditioned state” (p. 56). Lazarus and Folkman (1984) distinguished morale from subjective well-being as being a form of long-term affect, “a background affective state that is relatively enduring” (p. 195), dependent on positive thinking and effective coping, while Hart (2000) identified morale with positive emotions. Ford (2004) noted that psychologists have equated individual morale with “resilience in the workplace” (p. 24), implying a connection with stress and coping strategies.
INDIVIDUAL MORALE

The incorporation of individual morale (as distinct from school morale) into the SOS in 2004 reflected a greater focus by some researchers on morale as an individual predisposition or attitude (Doherty 1988; Evans, 1997b, 1998; Hart, 1994; Hart et al., 2000; Hart & Wearing, 1995). The development of this dimension arose from criticisms of morale as a group phenomenon, such as its measurement by the aggregation of the morale of individuals (Doherty, 1988), observations of low cohesiveness amongst groups (Evans, 1997b, 1998, Hart, 2000; Young, 1998), and the diversity and complexity of morale and satisfaction within individual schools (Evans, 1997b, 1998). Hart (2000) and Young (1998) found greater variation in staff morale within individual schools than between them, while Smith (1987) noted the existence of staff sub-groups. Young (1998) described differences between self-perceptions of morale and views of staff morale, supporting Hart’s (1994, 2000) view of morale, reflected in the SOS, as having two qualitatively different dimensions which can be measured by individual perceptions.

Both Evans (1997b, 1998) and Doherty (1988) argued that morale was essentially an individual attribute. Evans (1997b) defined morale as a psychological state which is “determined by the individual’s anticipation of the extent of satisfaction of those needs which s/he perceives as significantly affecting her/his total work situation” (Evans, 1997b, p. 832). Doherty (1988) viewed morale as a “portmanteau construct” (p. 66), representing a person’s general psychological state or orientation, and covering a range of dimensions related to adjustment, mental health and alienation, including optimism, self-esteem, social effectiveness, anxiety, depression and powerlessness.

FACTORS IMPACTING ON MORALE

Morale developed as a concept in education through the recognition that a co-operative and positive staff team was important to achievement of common goals and enhanced student outcomes (Mackenzie, 2007; Smith, 1966). A variety of factors have been suggested as impacting on levels of confidence and morale amongst teachers, including curriculum and accountability reform, leadership style, increasing work demands, constant change, social problems, and decline in school performance (AISQ, 2003; Coverdale, 1975; Evans, 1997b, 1998; Geneck, 1983; Mackenzie, 2007; O’Brien & Down, 2002). Changes in individual morale have been linked with stress: individuals
with lower morale are more likely to be distressed while people with higher morale cope more effectively (Ford, 2004).

Evans (1997b, 1998) suggested that, as well as teacher personality, a wide range of contextual factors contributed to the diversity of morale she found in and between schools. She related differences in morale within schools to the degree to which the professional expectations of teachers had been met by the school culture (Evans, 1997b, 1998, 2001). A number of studies have highlighted the importance of leadership in the form of the school principal or head teacher in maintaining and improving levels of staff morale (AISQ 2003; Evans, 1998; Lumsden, 1998; Mackenzie, 2007; Smith 1976, 1987; White & Stevens, 1988), as reflected in most measures of morale or school climate. Teacher morale has also been correlated positively with school health and effectiveness, empowerment, support, and enjoying teaching children, as well as student morale, responsiveness, and achievement (AISQ, 2003; Evans, 1997b; Lumsden, 1998; Mackenzie, 2007; Young, 1998), but not pay, which seemed a low priority for teachers (Evans, 1997b). Smith (1987) found that staff in primary schools had higher morale than those in secondary schools, which he attributed to greater co-operation and an increased sense of belonging. Suggestions for improving morale have included an increased focus on teachers’ feelings and attitudes (Genck, 1983), supportive and distributive leadership, greater acknowledgement and professional autonomy, higher status, community support, more positive interactions with students and colleagues, and assistance with discipline (AISQ, 2003).

MEASUREMENT OF MORALE
Most studies of morale have used quantitative surveys, either specific morale instruments or morale-related scales from wider measures of school climate, health or well-being (Evans, 1998; White & Stevens, 1988; Young, 1998) in order to measure group-level characteristics. For example, the morale dimension of the Organisational Health Inventory (OHI), developed by Hoy and colleagues, measured “the sense of trust, confidence, enthusiasm and friendliness amongst teachers” (Brown & Ralph, 1998, p. 47). Morale has also been correlated with Goldberg’s General Health Questionnaire (GHQ) and with measures of self-concept relating to teacher expectations of themselves (Young, 1998).
A specific instrument for the measurement of morale developed by Cattel and Stice (Smith, 1966, 1976) was a generic survey which covered dimensions of group cohesion, tenacity and fortitude, leadership synergy, adventurous striving, and personal reward. This survey was adapted by Smith (1966, 1976) into a shortened version for use in schools, the Staff Morale Questionnaire (SMQ), and reduced to three dimensions: cohesive pride, leadership synergy and personal challenge (Brady, 1976; Hart et al., 2000; Smith, 1976). Other measures of staff morale have included Guba’s (1958) Teacher Behavior Rating Scale, with items relating to willingness to do extra duties and working co-operatively with colleagues and the administration, and Coughlan’s (1970) School Survey, which measured perceptions of the teacher’s work environment, including administrative operations, working relationships, school effectiveness and career fulfilment. Doherty (1988) measured his conception of individual morale through a self-esteem inventory validated against the GHQ; while, unlike most surveys of morale, Coverdale (1975) used a questionnaire with a mixture of open as well as closed questions.

The assessment of organisational morale through survey methods has been criticised by Smith (1987) as not sufficiently distinguishing between causes and symptoms and as only evaluating morale at a particular point in time rather than over a longer period. Lazarus and Folkman (1984) commented that surveys tend to sum different emotions into a single index, and are not able exclude the influence of factors external to work on responses. However, other approaches to the study of morale have been relatively few, though both Evans (1997b, 1998) and Mackenzie (2007) employed a mixed methods approach involving interviews, participant observation and questionnaires.

MORALE AND THE STAFF OPINION SURVEY

In the SOS and the model associated with it, morale was defined as positive emotions, characteristics such as energy, enthusiasm, team spirit and pride (DoE, 1998; Hart, 2000; Hart & Cooper, 2001; Hart et al., 2000; Hart & Wearing, 1995), a relatively narrow definition when compared with Doherty (1988). Morale was represented in the SOS from 2004 by two dimensions, individual morale and school morale, investigating how teachers felt about themselves and how they felt about their workgroup. The model underlying the SOS contrasted morale with psychological distress (negative emotions). Stress and morale occupied separate affective paths in contributing to well-being,
meaning morale should not be correlated with measures of negative affect (Hart et al., 2000), and that morale cannot be improved by reducing negative work experiences, but only by increasing positive experiences (Cotton & Hart, 2003; Hart, 1994; Hart & Wearing, 1995). Cotton and Hart (2003) provided the example of an employee with high morale suffering from the flu being more likely to “soldier on” (p. 120): “it is a person’s level of energy, enthusiasm and pride that more strongly influences their decision to take time off work, rather than the level of distress they may be experiencing” (p. 120).

The separation of morale into two dimensions in the SOS assumes that individual and group morale are qualitatively different. Group morale does not simply consist of aggregations of individual measures at a group level, but is clearly distinguishable as “individual employees’ experience of the emotional tone of the workgroup” (Cotton & Hart, 2003, p. 121). In this model organisational factors relating to positive experiences are greater contributors to teacher morale than issues concerning the classroom (Cotton & Hart, 2003; Hart, 1994; Hart et al., 2000), while, in reverse, raising morale is the best approach to improving organisational climate. Poor morale is best monitored through symptoms of employee withdrawal behaviour (absenteeism, staff turnover and workers’ compensation claims) and perceived work demands (Cotton & Hart, 2003). The model correlates individual morale with contextual performance, especially job dedication, and workgroup morale with helpfulness (Cotton & Hart, 2003).

MORALE SUMMARY
This section has described the use of morale to characterise levels of positivity in an individual or group. Morale has been defined in a range of ways, but has traditionally been used to describe group-level characteristics such as levels of confidence, energy, unity and cohesiveness which are thought to impact on the ability to achieve organisational goals. Group morale has usually been measured through the aggregation of individual self-report of group tone. Many definitions of morale have been needs-based and have been distinguished from job satisfaction by the anticipation of needs fulfilment. Morale has also been defined in terms of its emotional elements.

Some researchers have suggested that morale is best thought of as an individual rather than a group concept because of the degree of variation within groups, particularly
school staffs. A wide range of factors have been attributed to raising or lowering morale, in particular school leadership. The SOS incorporates dimensions of both individual and group morale and equates morale with positive emotions, including elements such as pride, team spirit and energy. The SOS model assumes that levels of morale are independent from levels of distress (negative emotions).

The following section describes the overall organisational health framework within which the SOS is situated, including concepts relating to organisational culture, climate and health.

**ORGANISATIONAL HEALTH CONCEPTS**

An organisation is regarded as a structure where “diverse parts or elements are co-ordinated to form an integrated, coherent and systematic whole” (Reber, 1995, p. 521). It is a social system involving individuals, facilities and products, distinguished by common goals, co-ordination of effort, and division of labour (Reber, 1995). Research into organisational structure as a group-level phenomenon has sought to identify and monitor those features which make an organisation successful (and those which detract from success), using these insights to improve productivity and outcomes. In education the emphasis has been on describing the distinctive qualities of schools as discrete organisations (Freiberg & Stein, 1999), with a focus on teachers (as distinct from the wider staff group, or parents or students), and a common belief in school leadership as a crucial organisational factor.

This section discusses three related concepts associated with analysing the structure and well-being of organisations: organisational culture, organisational climate and organisational health. Though these terms have sometimes been used interchangeably, researchers using quantitative methods tend to refer to organisational climate or organisational health, while qualitative researchers refer more to organisational culture. Because of this general methodological distinction, qualitative studies of schools as organisations are discussed under organisational culture, and quantitative studies under organisational climate or health. The term generally used to describe school well-being in the SOS model is organisational health.
ORGANISATIONAL CULTURE

Organisational culture has been distinguished from organisational climate and health as involving a use of qualitative rather than quantitative data, tending to be anthropological rather than psychological in orientation, and being based on shared assumptions rather than shared perceptions (Freiberg & Stein, 1999; Hoy & Feldman, 1999; Hoy & Sabo, 1998). In practice, the major distinguishing feature of investigations into organisational culture would seem to be the use of qualitative methods and paradigms, through case studies of single schools or a small number of schools, as well as a particular interest in social interactions as providing insight into organisational dynamics. Organisational culture has been defined as the set of distinctive values, orientations and assumptions shared by the members of an organisation which hold it together and give it a particular feeling or identity (Hoy & Feldman, 1999; Hoy & Sabo, 1998), or “part of the multiple social realities that people construct for themselves” (Nias et al., 1989, p. 10). Since the study of schools as organisations developed in the United States of America in the 1950s, there have been many studies of aspects of organisational culture in education (e.g. Hoyle, 1975b; Nias et al., 1989). Most studies have relied on interviews, focus groups and participant observation as methods of data collection. Cultural investigations have observed a number of common features of schools as successful social organisations, particularly teamwork and mutual support, associated with good communication, strong leadership and a unified approach.

Teamwork

Successful schools seem to possess a co-operative and collaborative culture where individuals and groups are valued and there is an emphasis on personal relationships amongst staff (Ames & Miller, 1994; Evans, 2001; Nias et al., 1989), a “pervasive atmosphere of consideration for others” (Nias et al., 1989, p. 55), where “everybody is somebody” (Ames & Miller, 1994, p. xx). In these schools staff see themselves as an interdependent family who share resources and have common child-centred goals. There is a strong sense of teamwork, openness and tolerance (Ames & Miller, 1994; Nias et al., 1989), with staff willing to submit power to others in a group, a factor which prevents cliques from forming (Nias et al., 1989). Researchers have observed that a significant indicator of a cohesive staff teaming effectively is the atmosphere in communal staff-rooms, important social, political, and work meeting places for staff, where participation “is determined by their need to cooperate with their colleagues, and
is not compulsory” (Ben-Peretz et al., 1999, p. 150). In these staff-rooms symptoms of fluid social interaction are evidenced by inclusive seating and even the symbolism of the shared use of coffee cups (Ben-Peretz et al., 1999; Nias et al., 1989). The importance of teamwork in successfully facilitating change has been noted in studies of urban schools in the United States of America (Ames & Miller, 1994; Stringfield, 1999).

Support

The importance of support to a collaborative staff culture has been widely noted (Ames & Miller, 1994; Holmes, 2005; Rogers, 1992, 2002). Schools with strong personal and professional support tend to be open and tolerant places where feedback and encouragement is valued, which rely on trust and teamwork, and have a healthy learning culture (Rogers, 2002). Particularly important to this atmosphere of co-operation and assistance is contextual performance, involving the prosocial or discretionary behaviours of workers (George, 1990; Hart & Cooper, 2001; Hart & Cotton, 2003), behaviours which are “not formally required of employees, but are necessary for the overall success of the organization” (Hart & Cooper, 2001, p. 106). These supportive behaviours, additional to mandated work roles and therefore not reflected in individual productivity, nevertheless contribute to groups functioning smoothly and at optimum levels (George, 1990). Hart & Cotton (2003) identified elements of contextual performance such as “participation, job dedication, helpfulness and promoting the organisation to others” (p. 124). The concept of organisational citizenship behaviour (OCB) (Moorman, 1991; Penner et al., 1997), “extra-role behaviors that may benefit an organization or people within the workplace” (Penner et al., 1997, p. 114), has been developed to describe these characteristics. Moorman (1991) found a relationship between organisational citizenship behaviour and organisational justice, workers’ sense of being treated fairly by their supervisors.

A school’s leadership is also crucial in developing a collaborative and supportive culture (APRG, 1990; Mathison & Freeman, 2006; Rogers, 2002) through modelling desired values and offering a clear sense of purpose (Nias et al., 1989). Mutual support is more readily available and accessible in an organisation with open communication between school leadership and staff (Holmes, 2005; Rogers, 2002), making it possible
to identify problems early and address them appropriately. Rogers (2002) found support was stronger in primary schools and was particularly important for first-year teachers.

ORGANISATIONAL CLIMATE
The concept of organisational climate, developed during the 1950s, has been the most widely used of the three related terms relating to organisational well-being, and has been applied predominantly by researchers using quantitative data obtained from staff self-response to diagnostic surveys. Organisational climate involves an inferred perception of “apprehended order” which is used as a framework for individual behaviour (Schneider, 1975, p. 449). Though there is no agreed definition of organisational climate (Hoy & Sabo, 1998), it has been generally understood to consist of the enduring qualities or personality of an organisation as experienced by its members, a collective perception of organisational function which affects their attitudes and behaviours (Cotton & Hart, 2003; Hart & Cooper, 2001; Hoy & Feldman, 1999; Hoy & Sabo, 1998; Young, 1998). Schneider (1975) suggested that each organisation has a number of different climates and that employees learned common behaviours through these climates, which reduced individual differences. Organisational climate in educational contexts has been described as “the heart and soul of a school” (Freiberg, 1999, p. 4), manifested by the “extent to which the school atmosphere promotes openness, colleagueship, professionalism, trust, loyalty, commitment, pride, academic excellence, and cooperation” (Hoy & Sabo, 1998, p. 2), including such aspects as leadership style, appraisal, clarity and goal alignment (Cotton & Hart, 2003).

Halpin and Croft (Hoy & Sabo, 1998) undertook pioneering research into organisational climate in education in the United States of America in the 1960s. They developed the widely-used Organisational Climate Descriptive Questionnaire (OCDQ) and its associated model of organisational climate to assess teachers’ perceptions of staff and leadership behaviour in a school (Brown & Ralph, 1998; Freiberg, 1999; Hoyle, 1975b; White & Stevens, 1988). The OCDQ examined the extent of openness in interpersonal relationships which distinguished one organisation from another (Hoy & Feldman, 1999; Young, 1998). It covered eight dimensions of organisational life, four characterising the group and four the principal as leader, which could be used to categorise a school’s organisational climate (Freiberg, 1999; Hoy & Sabo, 1998). This survey was used to diagnose the climate of an organisation on a continuum ranging
from open (most desirable) to closed (least desirable). In this model an open climate is characterised by a school having teachers who are engaged, strong but supportive rather than directive leadership, good communication, a focus on people rather than products, and a high level of team spirit and consideration of others (Freiberg, 1999; Hoy & Sabo, 1998). Ideally, a school should be marked by genuine, open interactions, with the principal leading by example and teachers working together easily (Brown & Ralph, 1998; Freiberg, 1999; Hoy & Sabo, 1998). The model assumes that every school has an individuality which can be analysed, that perceptions are more important than reality in determining behaviour, and that important elements of a successful organisation are well-developed communication and good leadership, which should come easily from any source (Hoy & Sabo, 1998). There has been some criticism of the OCDQ over the nature of its six climates and its restriction to the social interaction of teachers and principal (Hart et al., 2000; Hoy & Sabo, 1998), but the survey has been widely adapted and used extensively in organisational climate research in education over a long period (Hoy & Sabo, 1998). Hoy and colleague (Hoy & Sabo, 1998) revised the OCDQ into six dimensions, comprising supportive, directional and restrictive principal behaviour, and collegial, intimate and disengaged teacher behaviour, devising surveys for elementary, middle and secondary schools, and extending data collection to include focus groups and interviews.

Hart and colleagues (Hart et al., 2000) argued that though there are many scales which examine various elements of organisational climate in education, they do not take into account the full range of organisational factors as indicated in research, an observation which stimulated their development of the SOS for use in schools. A generic version of the SOS, the Organisational Climate Questionnaire, has been used in other fields such as the police force, both in Australia and overseas (Hart, 2000).

ORGANISATIONAL HEALTH
Organisational health has been the term generally used by Hart and colleagues when discussing the SOS and its underlying model. It is closely associated with organisational climate, and not clearly delineated from it, with researchers sometimes using different terms to refer to the same concept or body of evidence (e.g. Hart, 2000; Hart & Cooper, 2001; Young, 1998). In its use by Hart (1994, 2000) it seemed to imply a broader organisational view than organisational climate through its inclusion of sub-scales of
individual affect. Research into organisational health, like organisational climate, has relied predominantly on quantitative surveys, generating empirical data based on perceptions of behaviour.

Organisational health has been described as gauging the wellness or degree of health of a school as an organisation (Hoy & Sabo, 1998), based on certain desired characteristics such as its capacity to adapt to change, meet goals, manage work pressures, and avoid ineffectiveness (Young, 1998). A healthy school is considered to meet task needs, such as goal focus, communication adequacy, and optimal power equalization, as well as internal organisational needs, including resource use, cohesiveness and morale (Hoy & Feldman, 1999; Hoy & Sabo, 1998). It also displays properties of innovativeness, autonomy, adaptation and problem-solving (Hoy & Feldman, 1999; Hoy & Sabo, 1998). Organisational health models tend to assume that quality of teacher work life is a strong indicator of a healthy school, and that healthy organisations need to change and grow, but that change can be disruptive and it is the management of change which chiefly impacts on organisational health (Hart, 2000; Hoy & Sabo, 1998; Young, 1998).

Hoy and colleagues (Hoy & Feldman, 1999; Hoy & Sabo, 1998) developed the Organisational Health Inventory (OHI) to gauge organisational health. The OHI seeks to determine the health and well-being of schools by assessing the “collective sense of friendliness, openness, enthusiasm, and trust amongst faculty members” (Hoy & Feldman, 1999, p. 88). It consists of eight dimensions, examining technical, managerial and institutional levels, with morale as one of the technical dimensions. A healthy school has each of these levels working in harmony, as the school meets its needs, copes with external forces, and focuses energy on its mission (Hoy & Feldman, 1999; Hoy & Sabo, 1998).

ORGANISATIONAL HEALTH AND THE STAFF OPINION SURVEY
The stimulus for the model of organisational health developed by Hart and colleagues (Hart, 1994; Hart et al., 2000) associated with the SOS derived from the views of Cox and colleagues (Cox, 1988; Cox et al., 1988). They argued that the conventional, individually-oriented occupational health approach neglected the organisational perspective by focusing on the health of the worker (Cox, 1988; Cox et al., 1988). Cox (1988) felt that this approach should be replaced by a model which addressed “the
health and viability of the organization” (p. 1). In relation to education, this broader organisational health approach placed the individual teacher within the school organisational context and its culture, structure and processes (Cox et al., 1988). It suggested that the school environment would benefit from a focus on organisational factors such as team spirit and problem-solving, change management, social climate and shared goals, which would develop “a more co-operative and supportive culture within schools” (Cox et al., 1988, p. 359), and ensure performance matched expectations.

This perspective on organisational health was further developed by Hart and colleagues through a comprehensive research program which gathered empirical data from 170,000 employees in public and private sectors both in Australia and overseas (Hart, 1994, 2000; Hart & Cooper, 2001; Hart et al., 2000). This research included preparatory work for the SOS undertaken with Victorian teachers between 1990 and 1992. The model which emerged maintained a simultaneous focus on both employee well-being and organisational outcomes (Hart, 2000; Hart et al., 2000). It suggested that “a positive organisational climate contributes to increased work effort and staff satisfaction which, in turn, contributes to greater performance” (Hart, 2000, p. 32).

The model assumes distress (negative affect) and morale (positive affect) occupy separate paths in determining individual well-being (Hart, 1994), so that reducing distress alone will not improve morale or the reverse. Improving quality of work life for staff requires focusing on both positive and negative work experiences simultaneously (Hart, 1994, 2000). The model suggests that individual characteristics based on personality largely determine experiences of distress and morale, but are difficult to change. On the other hand, organisational characteristics such as organisational climate, staff morale and motivation, which account for much of the variation between workgroups, are amenable to real improvement because they are under the direct control of schools (Hart, 1994, 2000; Hart & Cooper, 2001).

ORGANISATIONAL HEALTH SUMMARY
This section has described three connected concepts which have been used to analyse schools as social organisations: organisational culture, organisational climate and organisational health. Organisational culture has been generally used in small-scale qualitative case studies to describe the characteristics of a particular organisation
through observation of the social interaction of its participants which give it a particular identity. Successful school staff cultures emphasise co-operation, teamwork, support and sharing, which extend throughout the organisation. Discretionary behaviours not essential to core work roles are important in developing this atmosphere. Organisational climate and organisational health concepts have been generally used in quantitative studies to compare schools against a desired model or climate through broad-scale surveys of staff perceptions. The influential model of school climate developed by Halpin and Croft (Hoy & Sabo, 1998) emphasised the importance of open staff interaction and strong but supportive school leadership. Organisational health, the assessment of the wellness of a school, is closely related to organisational climate in its methodology. The SOS model of organisational health follows other approaches in its use of a survey self-report to assess staff attitudes and its focus on leadership. However, it varies from them in addressing organisational processes as well as the perspectives of individual workers, and in assessing both negative and positive emotions (distress and morale), assumed to operate independently. Literature relating to organisational health is further examined in the following section which outlines how the SOS was developed, its content and administration. Perceptions of the SOS form the focus for the second research sub-question.

**STAFF OPINION SURVEY**

This section examines the initial construction of the SOS and describes its evolution since it was first used in schools. It outlines the key characteristics of the SOS during the period relevant to this research, 2004-2006, describes the analytical tools associated with the SOS, and gives a review of the data which the SOS has produced.

**SURVEY DEVELOPMENT**

*Survey construction*

The first version of the SOS, the School Organisational Health Questionnaire (SOHQ), developed by Hart and colleagues in conjunction with the government, evolved from three studies of Victorian teachers who participated in professional development programs between 1990 and 1992 (Hart, 1994, 2000; Hart et al., 2000). The first of these studies evaluated potential questionnaire items against five subscales from the Teacher Stress Inventory related to negative work experience, including stressors such
as ministry demands, authoritarian leadership and poor staff relationships, and
developed eight general dimensions of organisational climate (including morale) (Hart,
1994; Hart et al., 2000). The second study examined positive teaching experiences,
psychological distress, morale, and quality of work life, and developed four dimensions
specific to teaching: curriculum coordination, effective discipline policy, excessive
work demands and student orientation (Hart, 1994; Hart et al., 2000). The third study
combined items from the first two studies, some items reworded negatively to be
“consistent with the language typically used by teachers” (Hart et al., 2000, p. 219),
together with three additional items, and validated the combined questionnaire against
other measures of organisational climate including the Satisfaction With Life Scale
(teacher quality of life) and General Strain Index (psychological distress), as well as
items of global and specific job satisfaction (Hart, 1994; Hart et al., 2000).

This resulted in a 54-item questionnaire which measured morale and eleven other
dimensions of school organisational health: appraisal and recognition, curriculum co-
ordination, effective discipline policy, excessive work demands, goal congruence,
participative decision-making, professional growth, professional interaction, role clarity,
student orientation and supportive leadership. The questionnaire included items relating
to organisational factors specific to teaching and those held in common in with other
organisations. Survey responses were measured on a five-point scale indicating degree
of agreement with each statement (Hart, 1994; Hart et al., 2000).

**Staff Opinion Survey, 1995-2003**
The SOHQ was benchmarked and normed before being piloted in schools (DE&T,
2005b; Hart, 1994), resulting in a revised version of 14 dimensions, with school distress
as one of the added dimensions. This version was first used in a research project in 80
Victorian schools in 1995 (Hart, 2000), and became available to all government schools
from 1996, when it was used annually as part of the government’s accountability
framework (DE&T, 2004a). Schools could opt to undertake either a shortened version
of the survey, the Staff Annual Report Survey, consisting of five dimensions, including
school distress and morale, or the complete survey, the Staff Full Diagnostic Survey.
They could also add their own questions. Schools generally undertook the shortened
version of the SOS except during the triennial school review (DoE, 1998). The
administration of the SOS was under the control of the principal in each school who
distributed and collected survey forms. Data was analysed centrally by the government and returned to schools together with feedback about performance against state-wide benchmarks. Data from the five mandatory dimensions was included in school annual reports (DoE, 1998). This version of the SOS remained current until 2003.

**Staff Opinion Survey, 2004-2006**

The version of the SOS used from 2004, which remained current during the period of the research, was significantly revised from previous surveys, both in method of administration and in its content. This version made use of Internet technology to move away from a paper-based format, with staff going online to access the SOS and using passwords to log in, giving respondents the benefit of increased anonymity (DE&T, 2004b). Schools had a two-week window when the SOS could be undertaken, and principals could create staff passwords, check response rates, and block ineligible staff (DE&T, 2004b, 2005a). This method of administration remained substantially the same in the following two years, with minor improvements meaning users could exit, save and lock responses (DE&T, 2005a, 2006b).

Major changes in content for the 2004 SOS included the addition of a leadership module, optional at school level, and changes to the standard SOS. The number of dimensions in the standard SOS, undertaken by staff in all schools, increased from 14 to 20 (see Table 1 for dimensions in data report order). The new dimensions included individual distress and individual morale, student motivation, student decision-making, learning environment and classroom misbehaviour; and the SOS was also extended to 70 items (the complete list of items in the standard SOS, apart from classroom misbehaviour, is given in Appendix A1). All centrally-employed staff were eligible to respond to the SOS, including both part-time and full-time staff, and teachers as well as non-teachers (SSOs). Each category of staff answered questions for which they were qualified, with teachers responding to all 20 dimensions, principals 19, and non-teaching staff 12 (see Table 1) (DE&T, 2004b).
Table 1
Staff Opinion Survey, 2004-2006, dimensions in report order

<table>
<thead>
<tr>
<th>Groupings</th>
<th>Dimensions</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motivation (1)</td>
<td>1. Individual morale</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td></td>
<td>2. School morale</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td>Empathy</td>
<td>3. Supportive leadership</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td>Clarity</td>
<td>4. Role clarity</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td>Engagement</td>
<td>5. Professional interaction</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td></td>
<td>6. Participative decision-making</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td></td>
<td>7. Goal congruence</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td>Learning</td>
<td>8. Appraisal and recognition</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td></td>
<td>9. Professional growth</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td>Outcomes</td>
<td>10. Curriculum co-ordination</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>11. Effective discipline policy</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>12. Student orientation</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>13. Student motivation</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>14. Student decision-making</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>15. Learning environment</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>16. Student misbehaviour</td>
<td>Teacher/principal</td>
</tr>
<tr>
<td></td>
<td>17. Classroom misbehaviour</td>
<td>Teacher</td>
</tr>
<tr>
<td></td>
<td>18. Excessive work demands</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td>Motivation (2)</td>
<td>19. Individual distress</td>
<td>Teacher/non-teacher/principal</td>
</tr>
<tr>
<td></td>
<td>20. School distress</td>
<td>Teacher/non-teacher/principal</td>
</tr>
</tbody>
</table>

Respondents were reminded to answer all questions, to do the SOS individually, and not to spend too long on each question as “people’s initial response is usually the most valid” (DE&T, 2005a, p. 1). After entering their school name and job category, staff completed the first part of the SOS which contained 10 items covering the dimensions of individual distress and morale. They indicated how often over the previous month at school they had experienced feelings such as pride and anxiety, and responded on a seven-point scale for each statement, ranging from not at all to all the time. The second part of the SOS, which measured school operation, comprised 59 items on 17 further dimensions, this time requiring response on a five-point scale from strongly disagree to strongly agree. The final section of the standard SOS asked teachers to estimate on a scale from 0 to 100% (in 5% intervals) the amount of time they spent on class behaviour for the class which they taught most often. The dimensions of particular interest to this investigation are those relating to distress and morale. Items for these dimensions are shown in Table 2.
Table 2
Staff Opinion Survey, 2004-2006, morale and distress items

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Individual questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual morale</td>
<td>Feeling positive at school</td>
</tr>
<tr>
<td></td>
<td>Feeling enthusiastic at school</td>
</tr>
<tr>
<td></td>
<td>Feeling proud at school</td>
</tr>
<tr>
<td></td>
<td>Feeling cheerful at school</td>
</tr>
<tr>
<td></td>
<td>Feeling energised at school</td>
</tr>
<tr>
<td>School morale</td>
<td>There is a good team spirit in this school.</td>
</tr>
<tr>
<td></td>
<td>There is a lot of energy in this school.</td>
</tr>
<tr>
<td></td>
<td>The morale in this school is high.</td>
</tr>
<tr>
<td></td>
<td>Staff go about their work with enthusiasm.</td>
</tr>
<tr>
<td></td>
<td>Staff take pride in this school.</td>
</tr>
<tr>
<td>Individual distress</td>
<td>Feeling tense at school</td>
</tr>
<tr>
<td></td>
<td>Feeling anxious at school</td>
</tr>
<tr>
<td></td>
<td>Feeling negative at school</td>
</tr>
<tr>
<td></td>
<td>Feeling uneasy at school</td>
</tr>
<tr>
<td></td>
<td>Feeling depressed at school</td>
</tr>
<tr>
<td>School distress</td>
<td>Staff in this school experience a lot of stress.</td>
</tr>
<tr>
<td></td>
<td>Staff in this school are frustrated with their job.</td>
</tr>
<tr>
<td></td>
<td>Staff in this school feel anxious about their work.</td>
</tr>
<tr>
<td></td>
<td>Staff in this school feel depressed about their job.</td>
</tr>
<tr>
<td></td>
<td>There is a lot of tension in this school.</td>
</tr>
</tbody>
</table>

The questions relating to school morale and distress dimensions were unchanged from the previous SOS format. The general indicators of morale and distress were accompanied by items relating to positive emotional characteristics of enthusiasm, pride, energy and team spirit (morale); and negative emotional characteristics of anxiety, tension, depression and frustration (distress). This pattern was duplicated for individual morale and distress (new in 2004), with general indicators of feeling positive or negative at school for each dimension, and the same emotional characteristics, except that cheerfulness replaced team spirit (morale), and uneasiness replaced frustration (distress).

As well as undertaking the compulsory standard SOS, schools could opt to include a separate additional section relating specifically to the principal, which was reported separately and designed for purposes of principal self-evaluation rather than as a general measure of organisational health. This leadership module examined three focus areas of principal behaviour: people, development, and core business, including items relating to
managing people, seeking feedback, effectively managing projects, and providing direction (DE&T, 2004a).

SURVEY ANALYSIS
The data sets containing the SOS results were returned to schools by the government within two or three months. Each school received a report which indicated how the school as an organisation had fared on each area of the standard SOS. These results included graphs which compared the school’s mean dimension scores to benchmarks for all government schools and for like schools (such as primary or secondary), and individual percentile scores for each dimensions and for the key elements. Other pages of the report gave item-level data including response spreads and mean raw variable scores. A sample of like schools data is given in Appendix A2. The government advised schools on how to interpret the SOS data (DE&T 2004a; Hart, 2000), providing a “roadmap” to explain the relationship between variables, including the figures relating to the perceived underlying drivers of organisational health, the four key elements (empathy, clarity, engagement, and learning). Empathy derives from the dimension of supportive leadership; clarity from role clarity; engagement from professional interaction, participative decision-making and goal congruence; and learning from appraisal and recognition, and professional growth. These key elements were thought to drive staff motivation (individual and school distress and morale) (DE&T, 2004a, 2005b). Supportive leadership, assessing a leader’s self-awareness, approachability, trust and confidence in staff, ability to delegate, and communication skills, was the anchor variable, influencing all other variables and contributing significantly to school morale (DoE, 1998; Hart, 1994, 2000).

School leaders were advised that they should use percentiles and external benchmarks to compare their organisational health with other schools, and internal benchmarks to identify and target improvement goals, especially trend-lines over time (DE&T, 2006c; Hart, 2000). The order of analysis was: firstly, the motivation factors which gave emotional tone, secondly, the weakest of the four key elements and its components, which gave an improvement focus, and then excessive work demands (DE&T, 2004a, 2006c). The road map provided a detailed diagram showing the correlation between variables, and therefore the degree to which variables drive (affect) each other (Hart, 2000; DE&T, 2004a, 2006c), for example, supportive leadership drives role clarity.
positively (0.72) and excessive work demands negatively (-0.55), so improving supportive leadership should improve role clarity and reduce excessive work demands (DE&T, 2004a). Schools were reminded that the action to be taken depended on the school context as well as the data (DoE, 1998), and that as stress and morale were independent dimensions, they needed to be addressed separately (DE&T, 2004a; DoE, 1998; Hart, 2000).

SURVEY RESEARCH DATA
Aggregated SOS data indicated that on the whole organisational health in schools compared well with most other private and public occupations (DE&T, 2004a; Hart, 2000). The data showed considerable variation in organisational health between individual schools, with only a low correlation with school size (Hart, 2000). Most significantly, there was even “more variation within a school than between schools” (Hart, 2000, p. 36), with 15 to 30% of differences between schools and 70 to 75% of differences within schools. Variations between organisations were attributed to organisational climate, and within workgroups to personal factors (Hart, 2000; Hart & Cooper, 2001). The data highlighted differences in organisational health between school types, with primary schools showing higher levels of morale and organisational health than secondary schools (DoE, 1998, 2007; Hart, 2000; Hart et al., 2000). Descriptive statistics for the school morale dimension of the SOS for 1998-2006 (DoE, 2007) showed a mean score of approximately 75% for primary schools and approximately 60% for secondary schools. In terms of levels of organisational health, P-12 schools lie between primary and secondary schools but closer to secondary schools.

SUMMARY
This chapter has given the literature background relevant to the study, covering the areas of well-being (including job satisfaction), stress, morale, organisational health and the SOS. A diagram showing the interrelationship between these concepts is provided in Figure 1. The following literature summary includes connections between concept areas and interview questions in the research instrument.

The chapter began with an examination of the broad concept of well-being, which is used to describe all aspects of an individual’s life operating at a high level. Subjective
Figure 1

Concept map
well-being is an individual’s self-view of well-being and has been equated with happiness. Subjective well-being is regarded as having cognitive (life satisfaction) and emotional components. The study of emotions has included a debate over the relationship between positive and negative emotions. The SOS model supported Bradbury (1969) in arguing that positive and negative emotions occupy separate paths in influencing overall well-being or quality of life. The nature of well-being was investigated in this research in interview questions examining constructions of well-being and ways of improving staff well-being (questions 5 and 6). The relationship of positive and negative emotions was investigated through a question about high stress and high morale (question 15).

Within overall subjective well-being, job satisfaction has been generally perceived as a cognitive judgement of level of satisfaction with one’s work which has affective elements. The most influential theories of job satisfaction have been needs-based, particularly the research of Herzberg (1968), who separated job satisfaction into hygiene (external) and motivation (internal) elements, with motivation factors providing true job satisfaction. Evans (1997a, 1997b, 1998) applied this theory to teaching and reformulated the elements as job comfort and job fulfilment. A number of studies of job satisfaction amongst teachers have highlighted job satisfaction as deriving from contact with students and contributing to their progress, including an element of emotional attachment. Job-related attitudes were investigated in this research through an interview question concerning sources and experiences of job satisfaction (question 7).

Stress has been the most intensively studied area of organisational health and has long been an area of concern in education. Originating as a physiological concept contributing to disease, psychological stress is generally regarded as a highly subjective transaction between person and environment, with a range of psychological and physiological symptoms. The dominant cognitive-mediational theory of stress (Lazarus & Folkman, 1984) emphasises the role of appraisal and coping in an ongoing reaction to perceived harm or threat. The dynamic equilibrium theory of stress, which underpins the SOS model, integrates stress into a framework of organisational health where it is contrasted with morale and forms part of overall well-being. Most approaches to stress in education have reduced its measurement to symptoms of negative emotion such as
anxiety and depression, which was the approach taken in the SOS, where it is represented by the dimensions of school distress and individual distress.

Research into experiences of stress has emphasised its subjectivity and indicated the importance of personality type, locus of control and support in mediating its impact. Stress management texts for teachers have suggested a wide range of problem-focused and emotion-focused coping strategies, with a recent focus on managing negative emotions. Reported stressors for teachers seem to vary according to context, but have included work demands and classroom management. Where stress is extreme or occurs over an extended period, it may result in burnout, a condition of physical and emotional exhaustion. The nature of stress was investigated in this research through interview questions concerning the construction of stress by interviewees and their views of causes of stress for staff (questions 9 and 10). The connection between personality and experiences of stress led to a question asking interviewees to describe their own personality (question 8).

Morale was used in the SOS to represent the experience of positive emotions. Morale has traditionally used to describe group-level characteristics such as levels of confidence, energy and cohesiveness, aggregated through individual self-report. A number of definitions of morale have been needs-based, while others have been focused on the emotions (as in the SOS). Morale is usually thought to have an element of anticipation which distinguishes it from job satisfaction. Some researchers have argued that diversity of morale within groups means it is better thought of as an individual concept. The SOS separated morale into school (group) morale and individual morale. The model associated with the SOS assumes that stress (distress) and morale are independent. A range of factors have been thought to influence morale, especially school leadership, a factor recognised by the SOS. The nature of morale was investigated in this research through interview questions asking about the meaning of high and low morale, staff morale and individual morale (questions 12 to 14). Further questions asked about the relationship of stress and morale (question 15) and the meaning of team spirit (question 19), from an item in the SOS.

The study of educational organisations has involved concepts such as organisational culture, organisational climate and organisational health. Organisational culture has
generally focused on the social interaction of participants through small-scale case studies. These studies have highlighted the importance of teamwork and support in developing group cohesion, and achieving organisational goals. In contrast, quantitative researchers into organisational climate have used surveys of staff perceptions to develop a profile of an organisation which can be compared to a desired model or climate. The most influential organisational model has emphasised supportive leadership behaviour and open communication. Organisational health is an allied concept which focuses on the wellness of an organisation. The SOS, drawing on organisational climate models, has been developed within an organisational health framework which aims to focus simultaneously on individual and organisational outcomes. Organisational health literature on the effects of change led to an interview question concerning the impact of change factors on schools (question 3).

The first version of the SOS, including dimensions of school distress and morale, was used as a standardised measure of staff organisational health in Victorian schools from 1995. In 2004, the SOS was revised and extended into the format examined in this research, including the introduction of dimensions of individual distress and morale. This version of the SOS examined 20 dimensions of staff well-being, including four motivation dimensions relating to distress and morale, and other dimensions such as supportive leadership and professional interaction. Aggregated SOS data was returned to schools together with models of interpretation which could be used to analyse the school’s performance and compare it with other schools. The SOS model assumed that there were four key drivers of organisational health (empathy, clarity, engagement and learning) which were thought to drive motivation dimensions of distress and morale, and which were strongly influenced by supportive leadership. Existing SOS data has revealed greater variations in organisational health between schools than within schools. It has also shown considerably higher levels of organisational health, including morale, in primary schools than secondary schools. This observation led to an interview question used in the third case study (revised question 13). Other interview questions relating to the SOS examined survey response, survey administration, perceptions of the SOS, and understandings of stress and morale items (questions 16 to 22).

This discussion of the literature has given the theoretical context in which this study took place. The following chapter outlines the methodology and research design used in
the study, including the development of the research instrument, individual interviews, as well as the stages of data collection and analysis.
CHAPTER THREE – METHODOLOGY

This chapter outlines the methodology used to investigate the research questions, which aimed to develop an understanding of the construction of stress, morale, and well-being by staff in Victorian government schools, with reference to perceptions of the dimensionality of stress and morale, and to perceptions of the existing organisational health tool, the SOS. The chapter includes a discussion of the construction of the research design and research instrument. The research instrument involved a series of half-hour to one-hour interviews with staff in each of three different case study schools, including a set of structured questions ranging across the major areas of interest (well-being, stress, morale and the SOS), together with unstructured follow-up questions to pursue particular themes. The development and use of this data-gathering tool are described, along with the procedures used for data collection, data analysis and reporting the findings. Trustworthiness and limitations of the research design are also discussed.

RESEARCH DESIGN

This section describes the reasons behind using a qualitative methods approach, discusses the use of case studies and interviews, and gives a timeline of the research.

THEORETICAL APPROACH

This investigation accepted the guiding principles underlying much of the research using qualitative methods. The focus in this form of research is on the centrality of perception of participants, and their understanding, interpretation and experience of the world around them (Bell, 1999; Bogdan & Biklen, 2003; Foddy, 1993; Freebody, 2003; Miles & Huberman, 1994). This type of approach tries to make sense of “the meaning of events and interactions to ordinary people in particular situations” (Bogdan & Biklen, 2003, p. 23) through the assumptions which they make about their experiences. It recognises that part of the meaning of any phenomenon is embedded in its context (Lincoln & Guba, 1985), and so one of its aims is to produce a “coherent and illuminating description” (Schofield, 2002, p. 174) through intensive and extended contact with a naturalistic setting (Miles & Huberman, 1994). Such a research design tends to be more exploratory, explanatory, and descriptive (Freebody, 2003) than in research using quantitative methods.
This form of approach was thought appropriate for the study because the research investigated subjective perceptions of events rather than the reality of the events themselves, as well as how these understandings impacted on organisational behaviours. An intensive study of a small number of contexts or case studies yields a greater depth of knowledge of each situation than is possible in a more wide-ranging but shallower investigation, by providing the necessary detailed description to flesh out conceptual interrelationships and nuances. The nature of the inquiry meant that hypotheses were not established prior to research, but arose through data analysis. This grounded theory approach (Bogdan & Biklen, 2003; Lincoln & Guba, 1985), commonly used in qualitative research, is inductive rather than deductive, with theory following data rather than preceding them, allowing the design to “emerge, develop, unfold” (Lincoln & Guba, 1985, p. 225). The methodology employed bore some similarity to Evans’ five-year study of the morale, job satisfaction, and motivation of 19 teachers in four English primary schools (Evans, 1997a, 1997b, 1998, 2001) with her focus on “day-to-day realities and contexts” (Evans, 1997b, p. 831) and social dynamics, and their influence on work-related attitudes. Her study was based on a series of semi-structured interviews asking interviewees about the school context, teaching conditions, comparisons with other schools, their own morale and that of their colleagues, and what gave them job satisfaction (Evans, 1997a). Most of her research was conducted at a school reported to have low morale and one of her aims was to analyse and account for morale levels at the school as well as factors influencing job satisfaction (Evans, 1997b, 1998). However, unlike this investigation, Evans used a mixed methods approach which also involved initial participant observation as well as a post-interview questionnaire (Evans, 1997a, 1997b, 1998).

USE OF CASE STUDIES
The research involved three case studies of different school contexts, using as the research instrument a series of individual interviews with staff in those schools. The case study approach (Yin, 1994; see also: Bell, 1999; Bogdan & Biklen, 2003; Freebody, 2003; Lincoln & Guba, 1985, 2002; Patton, 1990) focuses on an instance or a series of instances, investigating the dynamics which occur in each setting (Eisenhart, 2002), with the purpose of gathering “comprehensive, systematic, and in-depth information about each case of interest” (Patton, 1990, p. 384). Cases may consist of individuals or, as in this investigation, groups, with each group “a collection of people
who identify with each other and who share expectations about each others’ behaviour” (Bogdan & Biklen, 2003, p. 56). The case study approach is preferred when manipulating behaviours is not possible, because it involves empirical investigation of current phenomena in a naturalistic context and incorporates a wide range of evidence (Yin, 1994). Through its “rich familiarity with each case” (Eisenhart, 2002, p. 17), this form of research provides contextual and situational understanding (Lincoln & Guba, 2002) with “a strong sense of time and place” (Freebody, 2003, p. 81) that enables thick description (Lincoln & Guba, 1985; Schofield, 2002). The purpose of thick description, a concept developed by Geertz (Miles & Huberman, 1994), is to produce a cross-section of life (Lincoln & Guba, 1985) which shares “in the meaning that cultural participants take for granted” (Bogdan & Biklen, 2003, p. 28) and makes it accessible to outsiders. Case studies allow a researcher to move from initial broad exploration to a more focused investigation, as theories are developed from data and tested (Bogdan & Biklen, 2003). Case studies enable continuous analysis and reporting as well as providing multiple perspectives which enable cross-data checking (Eisenhardt, 2002; Lincoln & Guba, 1985).

The case study approach has been widely used in educational research because it allows the researcher to develop a deeper understanding of the daily functioning of an organisation (Hoyle, 1975b). Educational case studies have often involved the study of one school or a small number of schools (e.g. Evans, 1998; Nias et al., 1989). This particular investigation involved case studies of staff in three separate schools. This form of research has been described as a comparative case study (Bogdan & Biklen, 2003), but Yin (1994) argued that it is just a variant of the basic case study design. The advantage of a study of multiple cases is that it allows data from each case study to be analysed individually, but also to be combined and analysed as a whole, facilitating comparison between case studies and the identification of the influence of contextual differences. The analysis of processes across a number of cases deepens understanding and strengthens the relevance of findings beyond any one specific setting (Miles & Huberman, 1994). This approach also enables the conceptual understanding of a range of settings with the “presence or absence of some particular characteristic of the original study” (Bogdan & Biklen, 2003, p. 63). The three case studies in this investigation were chosen to illustrate differences in a key structural variable, school type, with one school
from each of the most common school organisational models in Victoria: primary, secondary and P-12.

The case studies were undertaken sequentially. Being able to focus on one case study at a time allowed the researcher to refine research method technique, define parameters for further research, and apply theoretical insights gained from one study to succeeding case studies in a cyclical, evaluative process of data reduction and analysis, theory formation and testing (Bogdan & Biklen, 2003; Eisenhardt, 2002; Owen & Rogers, 1999). The primary school (prep to Year 6 students) was used as the first case study (school A) because it formed the simplest organisational type, followed by the secondary school (Years 7 to 12) (school B), and finally the P-12 school (prep to Year 12) (school C), representing the most complex organisational type as well as combining elements of primary and secondary education already examined in the first two case studies.

USE OF INTERVIEWS
The research instrument chosen for each case study was individual, semi-structured interviews, a frequently-used method in qualitative research (Bogden & Biklen, 2003). Interviews involve the exchange of understandings which allows the researcher to access and make explicit the perspectives of others (Freebody, 2003; Patton, 1990). Interviews “gather descriptive data in the subject’s own words so that the researcher can develop insights on how subjects interpret some piece of the world” (Bogdan & Biklen, 2003, p. 95). Individual (as distinct from group) interviews enable this in-depth investigation of subjective understanding to take place in an environment where views can be freely and confidentially expressed. This is particularly important when dealing with perceptions of well-being, as some other methods of research, such as focus groups or participant observation, have the potential drawback that data obtained from individuals are more likely to be influenced or constrained to an unknown extent by social interaction. The semi-structured interview format provided a framework of structured questions to cover a range of themes relevant to the research, and enabled responses to be compared between participants and between case studies, while still allowing the flexibility to ask unstructured, follow-up questions relevant to each interview participant.
TIMELINE

The timeline for the research design was as follows:
2005 – Data collection (interviews school A)
2006 – Data collection (interviews schools B and C) and preliminary reports to schools
2007 – Detailed data analysis
2008 – Detailed data analysis and final report writing
2009 – Report writing

Research visits to each case study school were undertaken over an extended period of time so that contextual variation (and consistency) could be noted. A list of these visits is shown in Table 3, together with the primary purpose of each visit.

Table 3
Visits to case study schools by researcher

<table>
<thead>
<tr>
<th>Date</th>
<th>Primary purpose of visit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>School A</strong></td>
<td></td>
</tr>
<tr>
<td>10/5/05</td>
<td>Discussion with principal (research introduction)</td>
</tr>
<tr>
<td>19/5/05</td>
<td>Discussion with acting principal (interview schedule)</td>
</tr>
<tr>
<td>26/5/05</td>
<td>Interview 1</td>
</tr>
<tr>
<td>9/6/05</td>
<td>Interviews 2 and 3</td>
</tr>
<tr>
<td>23/6/05</td>
<td>Interviews 4 and 5</td>
</tr>
<tr>
<td>21/7/05</td>
<td>Interviews 6 and 7</td>
</tr>
<tr>
<td>4/8/05</td>
<td>Interviews 8 and 9</td>
</tr>
<tr>
<td>18/8/05</td>
<td>Interviews 10 and 11</td>
</tr>
<tr>
<td>1/9/05</td>
<td>Interview 12</td>
</tr>
<tr>
<td><strong>School B</strong></td>
<td></td>
</tr>
<tr>
<td>13/10/05</td>
<td>Discussion with assistant principal (research introduction)</td>
</tr>
<tr>
<td>24/11/05</td>
<td>Discussion with assistant principal and principal</td>
</tr>
<tr>
<td>26/4/06</td>
<td>Interviews 1 and 2</td>
</tr>
<tr>
<td>17/5/06</td>
<td>Interviews 3 and 4</td>
</tr>
<tr>
<td>24/5/06</td>
<td>Interviews 5 and 6</td>
</tr>
<tr>
<td>14/6/06</td>
<td>Interview 7</td>
</tr>
<tr>
<td>5/7/06</td>
<td>Interviews 8 and 9</td>
</tr>
<tr>
<td>19/7/06</td>
<td>Interviews 10 and 11</td>
</tr>
<tr>
<td>2/8/06</td>
<td>Interview 12 and meeting with leadership team</td>
</tr>
<tr>
<td><strong>School C</strong></td>
<td></td>
</tr>
<tr>
<td>29/3/06</td>
<td>Discussion with principal (research introduction)</td>
</tr>
<tr>
<td>14/7/06</td>
<td>Discussion with principal (interview schedule)</td>
</tr>
<tr>
<td>26/7/06</td>
<td>Interviews 1 and 2</td>
</tr>
<tr>
<td>9/8/06</td>
<td>Interviews 3 and 4</td>
</tr>
<tr>
<td>16/8/06</td>
<td>Interviews 5 and 6</td>
</tr>
</tbody>
</table>
School A was visited nine times between May and September 2005, school B nine times between October 2005 and August 2006, and school C ten times between March and November 2006.

**NATURE OF THE SAMPLE**

This section explains how the case study schools were chosen, how contact was made with each school and research guidelines established, and how interviewees were chosen.

**SELECTION OF CASE STUDY SCHOOLS**

The sample of three schools selected as case studies was drawn from a much larger population of schools which could have been used in the investigation. There are a wide range of sampling methods available to the qualitative researcher, such as purposeful, typical, and unusual case sampling, all with the aim of “selecting information-rich cases” (Patton, 1990, p. 181). Most commonly, researchers will look for the typical or unusual (Bogdan & Biklen, 2003). The sampling method used in this investigation involved a combination of purposeful and typical sampling. Purposeful sampling, selecting cases for a particular reason, is often part of an emergent design, allowing the researcher to move back and forth between theory and research (Lincoln & Guba, 1985). In typical case sampling, “cases are selected with the cooperation of key informants . . . who can help identify what is typical” (Patton, 1990, p. 173).

This research design involved choosing one school from each of three sub-groups of schools organised by school type (primary, secondary and P-12). Within each sub-group, the selection of individual schools was subject to research and administrative constraints, as school participation in the investigation required both the agreement of the school itself, and of the Victorian Department of Education and Training. To streamline this process, all three schools were chosen from the same administrative
region. The region selected was non-metropolitan, to fit in with the logistical needs of
the researcher, who lived within the region.

Schools in the region were divided into school types. Potential schools for the study
were then generated from those schools approximately in the mid-range by student
enrolment (and staff size) for each regional school type sub-group, and which were not
otherwise atypical, as far as was known. The schools had to be of sufficient staff size
(over 20) to allow for a reasonable cross-sectional representation of different work
roles, and for a measure of non-response. Part of the research investigated the impact of
school change on perceptions of organisational health, so a further criterion was that
each of the school was undergoing, or had recently been involved in, some process of
change. School A (the primary school) came from a list of schools suggested by a
representative of the education region, while the other two schools were nominated after
consultation with administrators and teachers who had wide experience and knowledge
of schools in the area. All three schools were known to have principals interested in
issues of organisational health. Each of the schools initially approached agreed to take
part in the research.

CONTACT WITH SCHOOLS
First contact was made with each school through phone and email. An initial visit was
then made to schools to outline the aims and details of the research to the principal
(schools A and C) or an assistant principal (school B). School were asked to consider
whether they wished to be involved in the research and, if so, to obtain necessary school
council and leadership team approval (see Appendix B1 for the letter sent to the school
principal and B2 for the school consent form). Once school consent was given, a second
visit was made to negotiate how the research was to be undertaken, and a contact person
established (the acting assistant principal, later acting principal in school A, an assistant
principal in school B, and the principal in school C). Ongoing communication was
mainly by email.

SELECTION OF INTERVIEWEES
The selection of potential interviewees was left to the discretion of each school as this
was administratively more convenient. It also meant that any non-respondents would
remain anonymous and additional potential participants from the staff could be
approached without the knowledge of the researcher. A request was made to each school contact that about ten to twelve people be available for interviews, comprising a cross-section of staff, including the principal (or representative), classroom teachers, and SSOs. The number of interviews proposed for each case study was thought to be sufficient to provide contextual depth without generating excessive data for effective analysis. The specification for a range of staff was to enable comparison between people in different work roles and to encompass the sub-groups of staff undertaking the SOS. This aim was generally achieved. There were 12 interviews each in schools A and B, and 13 interviews in school C, including in all, three principals, two assistant principals, seven leading teachers, 20 classroom teachers and five SSOs.

Information packages were left with each school to distribute to and collect from potential interviewees. These included letters to the participants, plain language statements concerning the purpose of research, and participant consent forms (see Appendices B3, B4 and B5). This procedure of sending envelopes to schools to be distributed followed the example of other researchers such as Kyriacou and Sutcliffe (1978b). In all three schools the school contact asked staff for volunteers to do the interviews. The contact then approached people individually to make up the requisite number of interviews with a sufficient cross-section of staff, which included the principal of each school (the acting principal in school A as the principal was on leave). Once the initial sample of staff in each school had been established and agreed on, the school contact devised an interview timeline to fit in with the school’s operational requirements and the researcher’s availability. This procedure worked efficiently in schools A and C, where the samples and timelines were developed quickly, however, in school B there was a longer period between initial school approval and the organisation of interviews, a limitation of relying on the school contact to generate the sample of interviewees.

**RESEARCH INSTRUMENT**

This section describes how the interview schedule of questions was constructed and revised, and outlines the details of the interviewing process, along with the use of field notes taken after each interview and on each research visit.
INTERVIEW SCHEDULE DESIGN

The interview schedule comprised a set of structured questions which proceeded through the main areas of research interest: well-being, stress, morale and the SOS. The schedule was designed to allow the interview to be free-flowing at the start and enable a rapport to be established between interviewer and interviewee, then to become more structured, focused and specific, as recommended in this form of research (Bogdan & Biklen, 2003; Lincoln & Guba, 1985). The schedule also allowed for additional, unstructured follow-up questions individual to each interview, to enable initial responses to be explained in more detail or areas of research interest to be investigated further. During the interviews some structured questions had to be modified for particular participants (such as asking first-year teachers about teaching rounds rather than career experience) or amended because earlier responses in the interview had previously touched on this particular area of interest.

The thinking behind the questions in the interview schedule used for the first case study is now outlined. Questions 1 to 3 were introductory questions asking interviewees about their current and past educational experiences, while question 4 asked about change within the school. Questions 5 to 8 focused on well-being (including job satisfaction and interviewee personality). Questions 9 to 11 asked about construction of stress, while questions 12 to 15 inquired into morale (both individual and staff). Questions 16 to 22 investigated perceptions of the SOS.

Q. 1 What position/responsibilities do you have in the school, for example what classes do you teach?

This question was intended to put the interviewee at ease, get them talking about their work, and to find out where they fitted into the school.

Q. 2 Would you mind telling me how long you have been teaching for in total and how long you have been in this school?

This question aimed to establish the degree of experience of the interviewee and how new they were to the school being researched.
Q. 3 (If you have taught in other schools) can you describe these experiences for me?

The intention here was to get an overview of interviewees’ experiences elsewhere and examine how these experiences compared to being in their current school. This question was not reported on as these experiences proved generally not relevant to current attitudes.

Q. 4 Has this school changed over the period you have been in it? If so, in what ways?

The perceived impact of change on the organisational health of case study schools was an area of particular research interest.

Q. 5 What do you think is meant by the term well-being?

This question examined interviewees’ understanding of well-being, a widely-used term in organisational health literature, and was directly related to the major research question. Answers to this question could be directly compared with responses to similar questions on stress and morale (questions 9 and 12).

Q. 6 What, in your opinion, could be done to improve staff well-being in this school and who should make this happen?

This question covered perceived ways of strengthening well-being amongst staff in a particular school context and whose responsibility it was to carry them out.

Q. 7 What aspects of your work give you job satisfaction? Could you describe for me an experience which has given you particular satisfaction?

Job satisfaction is closely associated with well-being. The aim here was to see what made staff want to come to work and the nature of their job-related attitudes, an area which has provoked some debate in the literature.

Q. 8 Researchers have suggested that there are links between personality and experiences of well-being. If you were to describe your own personality in three or four words, what words would you use?
It has been theorised that there is a correlation between experiences of stress and some personality characteristics (particularly neuroticism and extroversion). The intention of this question was to see if there were any patterns amongst the personality descriptions or connection with subjective perceptions of stress.

**Q. 9** One of the concepts I am interested in exploring is that of stress and how it impacts on the way teachers do their work. Could you tell me what the word stress means to you?

This question was intended to evaluate how interviewees understood the concept of stress, part of the major research question and the first research sub-question relating to the dimensionality of stress. Humphrey and Humphrey (1986) asked a similar question.

**Q. 10** Can you describe for me an example of where you have been stressed at work (if there is one) and what effect it had on you?

This question followed on from the previous one and investigated what types of events gave rise to occupational stress and the impact of this stress on the individual concerned.

**Q. 11** What are the most common causes of stress in this school and in what ways do people deal with this stress?

The intention here was to evaluate perceived staff stress and its effects, to compare with reports of individual stress (questions 9 and 10), and to assess the degree of commonality in perceptions between staff. The second part of the question examined coping processes.

**Q. 12** Another term frequently used in organisational health and well-being is that of morale. When people talk about the levels of morale of an individual or group as being high or low, what do you think they mean by this?

This question investigated constructions of morale (major research question), enabling comparisons between states of high and low morale and their qualitative characteristics. It also evaluated the relationship between individual and group morale (first research sub-question).
Q. 13 How would you describe morale amongst the staff in this school? (Please explain)

The aim of this question was to assess the degree of common feeling about staff morale amongst interviewees, enabling comparison of these assessments with levels of morale shown in SOS results.

Q. 14 What about your own morale? Does it match that of the staff?

This question gauged individual morale amongst interviewees which could then be compared to assessments of group morale, further investigating the first research sub-question.

Q. 15 Do you think it is possible to have high stress and high morale at the same time? (Please explain).

This question related to Hart’s theoretical model of operational health (Hart, 1994, 2000) which proposed that stress and morale were independent constructs and could be at simultaneously high levels.

Q. 16 Can you tell me if you completed the most recent Staff Opinion Survey? (It required you to log into a website). If not, would you mind telling me why not?

This initial question on the SOS sought to determine whether interviewees had undertaken the previous survey and, if not, their reasons for non-response. The questions on the SOS (questions 16 to 22) were related to the second research sub-question.

Q. 17 If you completed surveys when they were paper-based (2003 and before), do you remember how they were administered? Is the web-based version preferable?

This question investigated the ease of use of the online version of the SOS when compared with its previous method of administration.
Q. 18 Do you think staff opinion surveys of this type are a good way of finding out about teacher and school well-being? What things would you change about them?

The intention here was to gauge the overall opinion of the interviewees about the SOS as a research tool and what aspects of the SOS (if any) they would like to see changed.

Q. 19 One statement in the survey which required a response was “There is a good team spirit in this school”. What do you think team spirit means and why do you think the question was asked?

This question investigated understanding of one of the staff morale items in the SOS which could then be compared with responses to earlier questions about the nature of morale.

Q. 20 I am going to read you a list of words which were used in survey questions. Would you mind telling me whether you think they refer more to stress or morale, or equally to both?
- Pride, depression, cheerfulness, frustration, anxiety, energy, enthusiasm, tension

Q. 21 I am going to read the list again. Do you think they apply more to individuals or groups, or equally to both?
- Pride, depression, cheerfulness, frustration, anxiety, energy, enthusiasm, tension

The aim of these two questions was to see whether interviewees placed the words in the same categories (stress/morale and individual/group) as employed in the SOS and to gain insight into the type of thinking used in responding to SOS items, particularly the relationship between individual and group qualities. The context questions were separated out into two groups to make them easier for the interviewees to answer.

Q. 22 If I asked you to do the Staff Opinion Survey again, do you think you would give the same responses as on the last occasion?

This question examined perceived variation in response to the SOS over time and the possible reasons behind any variations which were noted.
INTERVIEW SCHEDULE REVISION

Refinements to the interview schedule were made after each of the first two case studies. Some of these amendments reflected changes which had already occurred in practice, while others sought to investigate new areas of interest. A full list of these changes can be found in Appendix C1. The main change in the interview schedule from the first to the second case study involved the substitution of the question about SOS administration prior to being online (question 17) with one asking about general attitudes towards the SOS. This change came out of the interview data which showed an emphatic preference for the online version, as well as an awareness that the existing question tended to take the focus away from the current survey. The replacement question allowed further investigation of views about the SOS, which seemed a more promising area. There were several changes to questions for the third case study. Question 3 was altered to become more focused on current educational experiences and question 4 was expanded to include specific areas of change (students, staff and leadership). Question 12 on morale was amended to separate out definitions of high and low morale, as had already been interview practice. An addition to question 13 asked about differences between primary and secondary staff, and was specifically related to the P-12 context of the third case study. It emerged from literature showing differences in well-being between these two groups. Question 16 was expanded to ask about information given out before the survey, and the degree of discussion of SOS results, while question 22 was extended to ask about the survey from the previous year. Changes to both these items arose from questions which had developed during the interview process.

A separate interview schedule was developed for the interview with the principal of school B (the secondary school) (see Appendix C2) as this interview had to be conducted over a shorter time period. The main areas of investigation were still covered but in less detail, and there was a particular focus on the implementation of change within the school.

PRACTICE INTERVIEWS

With the assistance of teacher acquaintances of the researcher, two practice interviews were undertaken and fully transcribed before the formal research process began. These rehearsals enabled the draft interview schedule to be tried out in a real-life situation and
the researcher to gain valuable experience in conducting and transcribing an interview. Minor modifications were made to the interview schedule as a consequence of examining the data obtained, which included feedback from interviewees. Undertaking practice interviews enabled the interviewing style of the researcher to be refined, in particular, recognising the importance of unobtrusively controlling and directing an interview in order to achieve interview goals, while still allowing the interviewee to talk without constraint and being “reassuring and supportive” (Bogdan & Biklen, 2003, p. 95). The practice interviews also highlighted the potential for interviewee fatigue during an extended interview and the possible effects of this fatigue on responses to later questions; as well as the need for an interview location which was discreet, quiet, and unlikely to be disturbed.

RECORDING INTERVIEWS
Permission to record interviews was sought and gained from individual interviewees as part of the informed consent process (see Appendix B5). Recording and fully transcribing interviews enabled interview details to be revisited and checked at a later time (Freebody, 2003). Each interview was recorded on a digital voice-recorder, an Olympus DS-330, placed unobtrusively on the table between interviewer and interviewee, and the digital file downloaded to a laptop computer immediately at the conclusion of each interview. It was initially intended to take brief, supplementary notes during each interview, but this process was abandoned after the practice interviews as it was found that the information gained did not materially add to the data transcription. The researcher also found that it was too difficult to take notes and simultaneously maintain rapport with the interviewee, keep control of the interview, and respond appropriately to what was being said. Field notes taken after the interview proved to be more valuable in recording immediate contextual impressions as the researcher could focus on note-taking exclusively.

INTERVIEW LOCATION AND TIMING
It was important that the interview locations maintained confidentiality and were free from external noise. All interviews were undertaken at a private location inside each school, established in negotiation with the school contact person. An internal school setting (rather than an external location) was considered to be more natural and easier to manage, and fitted in with the wishes of school administrators. Most interviews were
held in meeting rooms or offices, vacated for the period of the interview. In school A, 11 interviews were held in the principal’s office with the remaining interview in the office of the assistant principal. In school B, 11 interviews were held in an interview room, one interview in a leading teacher’s office, and one interview in the principal’s office. In school C, 11 interviews were held in an interview room and two interviews in a welfare office. The alternative locations were used when either the primary interview space was not available or was not convenient to use. All locations met the requirements of the interview process.

Interview dates and times were organised by the contact person in each school to make the administration of the interviews as smooth as possible, as some interviews required coverage of classes by replacement teachers. When interviewing “you must cater to the interviewee’s schedule and availability, not your own” (Yin, 1994, p. 68). The researcher requested that no more than two interviews be scheduled per day in each school and that there be a sufficient gap between interviews in order to reduce interviewer fatigue and allow time for reflection and field notes. For the convenience both of the researcher and the school, wherever possible, interviews were scheduled on the same day of the week and at a regular time: Thursdays (9 am and 11.30 am) in school A, Wednesdays in schools B (10 am and 12 noon) and C (9 am and 11.30 am). A break of a fortnight was planned between most sets of interviews to allow for preliminary transcription and data analysis, and to enable each school to be visited over an extended period of time, useful for establishing patterns and noting contextual variations. Within the constraints of administrative requirements and staff availability, this was generally achieved.

INTERVIEW DETAILS
Thirty-seven interviews in total were conducted during the research, 12 in school A, 12 in school B and 13 in school C. Table 4 gives a full list of the interviews conducted (the names of interviewees are pseudonyms), including interview date, interview length, status of the interviewee, and the citation of each interview in research data references.
Table 4

Interview details

<table>
<thead>
<tr>
<th>Date</th>
<th>Interviewee</th>
<th>Status</th>
<th>Length</th>
<th>Citation</th>
</tr>
</thead>
<tbody>
<tr>
<td>School A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26/5/05</td>
<td>Jane Williams</td>
<td>Leading teacher</td>
<td>41 min</td>
<td>LT/A1</td>
</tr>
<tr>
<td>9/6/05a</td>
<td>Emma O’Reilly</td>
<td>Teacher</td>
<td>41 min</td>
<td>T/A1</td>
</tr>
<tr>
<td>9/6/05b</td>
<td>Leanne Chapman</td>
<td>Teacher</td>
<td>33 min</td>
<td>T/A2</td>
</tr>
<tr>
<td>23/6/05a</td>
<td>Susan Richards</td>
<td>Teacher</td>
<td>56 min</td>
<td>T/A3</td>
</tr>
<tr>
<td>23/6/05b</td>
<td>Troy Beames</td>
<td>Teacher</td>
<td>42 min</td>
<td>T/A4</td>
</tr>
<tr>
<td>21/7/05a</td>
<td>Robyn Woodman</td>
<td>SSO</td>
<td>57 min</td>
<td>S/A1</td>
</tr>
<tr>
<td>21/7/05b</td>
<td>Naomi Jones</td>
<td>Teacher</td>
<td>68 min</td>
<td>T/A5</td>
</tr>
<tr>
<td>4/8/05a</td>
<td>Tracey Stephens</td>
<td>Teacher</td>
<td>48 min</td>
<td>T/A6</td>
</tr>
<tr>
<td>4/8/05b</td>
<td>Adriana DeLuca</td>
<td>Teacher</td>
<td>49 min</td>
<td>T/A7</td>
</tr>
<tr>
<td>18/8/05a</td>
<td>Kate Trevena</td>
<td>Teacher</td>
<td>64 min</td>
<td>LT/A2</td>
</tr>
<tr>
<td>18/8/05b</td>
<td>George Smith</td>
<td>Acting principal</td>
<td>63 min</td>
<td>P/A</td>
</tr>
<tr>
<td>1/9/05</td>
<td>Jessica Stewart</td>
<td>SSO</td>
<td>69 min</td>
<td>S/A2</td>
</tr>
<tr>
<td>School B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26/4/06a</td>
<td>Trevor Edwards</td>
<td>Teacher</td>
<td>42 min</td>
<td>T/B1</td>
</tr>
<tr>
<td>26/4/06b</td>
<td>&amp;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17/5/06a</td>
<td>Sarah Loftus</td>
<td>Teacher</td>
<td>51 min</td>
<td>T/B2</td>
</tr>
<tr>
<td>17/5/06b</td>
<td>Anna Smythe</td>
<td>Teacher</td>
<td>42 min</td>
<td>T/B3</td>
</tr>
<tr>
<td>17/5/06c</td>
<td>Ian Trembath</td>
<td>Teacher</td>
<td>42 min</td>
<td>T/B4</td>
</tr>
<tr>
<td>24/5/06a</td>
<td>Christine Lewis</td>
<td>Teacher</td>
<td>42 min</td>
<td>T/B5</td>
</tr>
<tr>
<td>24/06b</td>
<td>Eleanor Stevenson</td>
<td>Teacher</td>
<td>39 min</td>
<td>LT/B</td>
</tr>
<tr>
<td>14/6/06</td>
<td>Alison Harvey</td>
<td>Assistant principal</td>
<td>40 min</td>
<td>AP/B</td>
</tr>
<tr>
<td>5/7/06a</td>
<td>Jo McIntyre</td>
<td>Teacher</td>
<td>35 min</td>
<td>T/B6</td>
</tr>
<tr>
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<td>Sally Peters</td>
<td>Teacher</td>
<td>38 min</td>
<td>T/B7</td>
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<tr>
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<td>SSO</td>
<td>37 min</td>
<td>S/B</td>
</tr>
<tr>
<td>19/7/06b</td>
<td>Stephanie Ulrich</td>
<td>Teacher</td>
<td>37 min</td>
<td>T/B8</td>
</tr>
<tr>
<td>2/8/06</td>
<td>Steve Allan</td>
<td>Principal</td>
<td>29 min</td>
<td>P/B</td>
</tr>
<tr>
<td>School C</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26/7/06a</td>
<td>Karen Clifford</td>
<td>Teacher</td>
<td>43 min</td>
<td>T/C1</td>
</tr>
<tr>
<td>26/7/06b</td>
<td>Pauline Dwyer</td>
<td>Teacher</td>
<td>49 min</td>
<td>T/C2</td>
</tr>
<tr>
<td>9/8/06a</td>
<td>Alan Carter</td>
<td>Teacher</td>
<td>76 min</td>
<td>LT/C1</td>
</tr>
<tr>
<td>9/8/06b</td>
<td>Louise Ashby</td>
<td>Teacher</td>
<td>41 min</td>
<td>T/C3</td>
</tr>
<tr>
<td>16/8/06a</td>
<td>Len Priestly</td>
<td>Leading teacher</td>
<td>48 min</td>
<td>LT/C2</td>
</tr>
<tr>
<td>16/8/06b</td>
<td>Patrick Evans</td>
<td>Assistant principal</td>
<td>53 min</td>
<td>AP/C</td>
</tr>
<tr>
<td>30/8/06a</td>
<td>Donna Robertson</td>
<td>SSO</td>
<td>34 min</td>
<td>S/C1</td>
</tr>
<tr>
<td>30/8/06b</td>
<td>Sharon Rogers</td>
<td>SSO</td>
<td>31 min</td>
<td>S/C2</td>
</tr>
<tr>
<td>6/9/06</td>
<td>David Clarke</td>
<td>Leading teacher</td>
<td>56 min</td>
<td>LT/C3</td>
</tr>
<tr>
<td>13/9/06a</td>
<td>Carol Grange</td>
<td>Principal</td>
<td>61 min</td>
<td>P/C</td>
</tr>
<tr>
<td>13/9/06b</td>
<td>Stewart Thorpe</td>
<td>Teacher</td>
<td>62 min</td>
<td>T/C4</td>
</tr>
<tr>
<td>4/10/06a</td>
<td>Charlotte Anderson</td>
<td>Teacher</td>
<td>34 min</td>
<td>T/C5</td>
</tr>
<tr>
<td>4/10/06b</td>
<td>Brian Evans</td>
<td>Leading teacher</td>
<td>58 min</td>
<td>LT/C4</td>
</tr>
</tbody>
</table>
The abbreviations used are P (principal), AP (assistant principal), LT (leading teacher), T (classroom teacher) and S (SSO), while A, B and C are used to denote the case study schools, together with an interview number (if required). So the citation T/A3 refers to the third interview with a classroom teacher in school A, LT/C2 refers to the second interview with a leading teacher in school C, and S/B to the only interview with an SSO in school B. An additional number in a transcript citation is used to indicate page numbers of direct quotes, so T/B1/6 refers to page 6 of the interview transcript of the first classroom teacher in school B.

Interviews ranged in length between twenty-nine and seventy-six minutes, with most interviews taking between thirty-five and sixty minutes. Length of interview was generally determined by the time available, and the attitude, interest and experience of the interviewee. The interviews in school B had to be completed within a designated fifty-minute period due to administrative requirements, so these interviews were generally shorter. One interview (T/B2) extended over two days (by interviewee request). In general, the interviews followed the framework established in the interview schedule, with most structured questions answered in some form by most of the interviewees. Occasionally, a question was inadvertently omitted or purposely left out because the ground had already been covered earlier in the interview. The interviews, with one exception (T/C4), generally followed the order of major themes (well-being, stress, morale, SSO) in the interview schedule.

FIELD NOTES
Regular field notes were taken to supplement the contextual detail provided by the interviews. Field notes are descriptive or reflexive and “record, ideas, strategies, reflections and hunches” (Bogdan & Biklen, 2003, p. 110). Field notes followed each interview (and before the following interview when two interviews were conducted on one day) and each visit to a case study school, so that recollections remained fresh. These field notes included general observations about the research setting, memoranda about methodology, immediate impressions about how the interview went, and reflections on responses which seemed to be particularly interesting or insightful. An extract from these field notes is given in Figure 2.
Figure 2

Extract from field notes after interview T/B2, 26/4/06

The interviewee was in her mid-thirties, a LOTE teacher, apparently dedicated and someone who puts effort into everything she does, as shown by the fact that she had prepared notes on stress and morale! (Which was a reason the interview went a little longer, to allow her to describe her all the stressors she was facing!) Like the previous interviewee she looked drawn and tired. She told me that she had no time allowance for being LOTE co-ordinator, despite the fact that she had to organise an exchange program of twenty students this year and a return visit of students from Wentworth (the first one that had gone ahead in six years, it was simply too expensive). She seemed to enjoy her job and the challenges it posed.

These field notes were found to be particularly useful in providing snapshots of each interview and interviewee, and the immediate school context as it appeared on that particular day. Field notes provided initial intuitive insights which could be confirmed or disconfirmed by further data and analysis (Miles & Huberman, 1994), for example, in the extract in Figure 2, noting the apparent work pressures in this particular school.

DATA ANALYSIS

This section describes the data analysis stage of the research, including the transcription and checking of interview transcripts, data coding and data organisation.

INTERVIEW TRANSCRIPTION AND CHECKING

Each interview was fully transcribed on to a Microsoft Word file as soon as possible after the interview had taken place. Transcription guidelines needed to be developed early on in the process, as even producing a transcript requires decision-making (Freebody, 2003). Decisions had to be taken about whether to incorporate non-verbal communication and how some verbal responses were to be rendered. Although the importance of non-verbal communication in interviews cannot be ignored (Freebody, 2003), and was sometimes commented on in field notes, it was decided not to include non-verbal information in transcripts, except on a few occasions to note that an interview had been interrupted briefly, or where it was crucial to understanding what
was being said by the interviewee. Each transcript page was numbered to facilitate ease of reference, but pseudonyms were not incorporated at this stage.

When all interviews for a particular case study had been transcribed, individual transcripts were sent back via the school to the interviewees for checking (Miles & Huberman, 1994). A feedback sheet was included which enabled interviewees to make specific comments and corrections to the transcript, as well as provide general comments on the interview (see Appendices C3 and C4 for the feedback sheet and accompanying letter). This procedure was intended to give interviewees an opportunity to confirm whether the transcript represented an accurate record of what had been said, and to allow them to provide additional data and to comment on the interview process. A cut-off date (about a month for each case study) was set for return of the feedback sheets and for interviewees to amend or withdraw data. The number of feedback sheets returned to the researcher varied between case studies (8 from 12 interviews in school A, 3 from 12 in school B, and 5 from 13 in school C), with an overall return rate of 43%. Most feedback sheets were signed and returned blank, or with minor amendments to interview transcriptions or short comments (see Appendix C5). No interviewee withdrew data. Most typically, interviewee feedback involved self-deprecation about their manner of speech as represented in the transcripts, apologising for frequent use of expressions such as “yeah” and “you know”, or for “rambling”. A number of interviewees also indicated that they felt that the interview had been a positive experience. Of the two interviewees who added comments enlarging on their interview, one (S/A2) appended an additional typed page, with a letter explaining the additions were not because the transcript was wrong, but because she had done some reflection after the interview: “I always feel I come up with better answers after I have thought about the question for a while.” Minor corrections were made to interview transcripts as a result of interviewee feedback, mostly the result of words being misheard and incorrectly transcribed.

PSEUDONYMS AND ANONYMITY
After the interviewee feedback process had been completed, the interview transcripts were altered to preserve the anonymity of the schools, interviewees and other individuals. The names of the case study schools, interviewees, other staff, and frequently-mentioned nearby regional towns were replaced by pseudonyms. The case
study school pseudonyms were Riverside (school A), Wentworth (school B) and Eastlake (school C). Other references to schools, places or people which might identify the identity or location of the institutions used in the research were removed and replaced by underscores (______). Two transcript excerpts from the fifth interview in the second case study (T/B5) are given in Figures 3 and 4. In these examples the interviewer is abbreviated as “I” and the pseudonymous Christian name of the interviewee as “C”.

DATA ANALYSIS

In undertaking data analysis a researcher using qualitative methods needs to demonstrate that any explanation of the data addresses the research questions, examines all relevant evidence and possible alternative interpretations, and ensures all cases are treated fairly (Yin, 1994). In particular, the researcher should be aware that “some subjects are more willing to talk, have a greater experience in the setting, or are especially insightful” (Bogdan & Biklen, 2003, p. 62). Data analysis involves a process of data selection and reduction which requires a series of decision rules about what to include, which should be explained as part of the audit trail (Miles & Huberman, 1994). Data analysis should be continuous and open-ended and may take a variety of forms such as a matrix or tables, but needs some form of general analytic strategy or classification (Lincoln & Guba, 1985; Miles & Huberman, 1994; Patton 1990; Yin, 1994). Data analysis in this investigation began during the interview process as insights and observations were recorded in field notes, draft interview transcripts annotated, and preliminary themes identified. This period of data analysis primarily assisted in refining interview questions and in preparing preliminary reports for schools. More detailed data analysis was undertaken after interview transcripts were approved. This involved familiarisation with the data through thorough immersion by reading the material many times over and making detailed notes. Patterns were established, data categories identified, and a coding system developed for organising interview data using a grid appropriate for displaying semi-structured interviewing data derived from Miles and Huberman (1994). Interview data was initially filed as direct quotes in one or more of twenty-seven data categories under seven headings (see Figure 5).
Figure 3
Transcript extract, interview T/B5/1

I: Okay, Christine, if we could just start off, if you could tell me a little bit about what classes or responsibilities you have in the school?

C: Okay. First of all, this year is virtually a hundred per cent new for me despite the fact that I’ve obviously been teaching for a while.

I: Mm

C: I have Year 10 English, and the last time I taught that was about 1982 or 3. I am still the KLA leader for Humanities or SOSE, I’m also in charge of the Hut, which is the PSD Co-ordinator, so I’m in charge of students with disabilities, and setting up a Language Support program. And I’m also working in the Library for the first time . . .

Figure 4
Transcript extract, interview T/B5/7-8

I: Moving on to something you alluded to earlier, job satisfaction. What aspects of your work give you job satisfaction?

C: I love working with children, I love creating interesting things for them to do, and I particularly like creating big things to do for them that they’re going to enjoy and get a buzz out

I: Mm

C: And they’ll see education’s fun. And I’m finally back in a role where I can do that sort of thing. I started off, when I first started teaching; I was always involved in either helping or initiating big things. And I can give you an example of that last year because I became KLA leader. I initiated Medieval Day . . .
These coding categories mirrored questions in the interview schedule, but also included organisational health themes which had begun to emerge during early data analysis, such as communication, teamwork and support. The specialised computer software for qualitative researchers, Nvivo 7, a code-and-retrieve program (Miles & Huberman, 1994) which automates coding, was trialled for this purpose, but it was eventually decided to carry out the coding by manual word-processing using separate Microsoft Word files in tabular form. Though more time-consuming, this process enabled the researcher to retain as much control as possible over the data and its manipulation, with the advantage of strengthening understanding through “eye-ballling” data. Having the coding category files and the interview transcripts in the same format meant that information could be readily taken back and forth between them. Each piece of relevant interview data was allocated to one or more coding categories and duplication in other coding categories noted in the coding citation. In some cases this meant portions of the same data appearing in three or four different categories, useful for establishing theoretical connections, but increasing the volume of material for the next stage of analysis. An example of how the information was coded at this stage is given in Figure 6. The data is from the first interview in the third case study (T/C1), page 16 of the transcript, and was filed under the category of high morale. The cross-reference indicates that the data, or part of it, was also filed under the category of support.
When all relevant data had been coded, a summary for each coding category was written in order to identify the main patterns which had emerged. These summaries highlighted and grouped connected themes within each category, for example, the perceived constituents of high morale, such as enthusiasm, support and sociability. At this stage the thematic summary approach was intended to be the major basis for reporting the research findings.

**REPORTING THE RESEARCH**

Reporting took place in a number of forms which included feedback to case study schools, papers presented at post-graduate seminars, and the preparation of the final formal report as a thesis.

**FEEDBACK TO CASE STUDY SCHOOLS**

Feedback to stakeholders about common themes which arose during research provided an opportunity for debriefing, as well as acting as a form of member check (Lincoln & Guba, 1985). Feedback to schools took place after preliminary analysis of the interviews had occurred, but before detailed data analysis had been undertaken. It was thought of more benefit to provide feedback relatively soon after the interviews rather than later on, when more extensive data analysis had taken place, but when the usefulness of the information may have been impacted by changes in context. Two of the three schools (B and C) organised a meeting of their leadership teams with the researcher where they were provided with a preliminary report of research findings.
specific to each school and an opportunity to discuss the report. Precautions were taken to avoid any possibility of compromising anonymity and confidentiality by keeping the discussion as general as possible. A preliminary report was also sent to school A (theses reports are in Appendix D). This method of feedback seemed to be well-received.

RESEARCH PAPERS

During the data analysis stage of the research two papers were delivered to post-graduate seminars at the Faculty of Education, University of Melbourne. The first paper, in November 2005, discussed emerging themes from the first case study (school A). The second paper, in November 2006, after all three case studies had been completed, focused on perceptions of the SOS. This paper was published in the post-graduate electronic journal of the Faculty of Education, *Post-Script* (Sturmfels, 2006).

THESIS PREPARATION

Initial drafts of research findings were directly based on the thematic categories developed during data coding. However, after further consideration of the material, it was realised that this would result in some data being weighted unevenly. Separating data from stimulus questions could also affect its interpretation. This issue is important when dealing with attitudes relating to areas of well-being because even small changes in question wording may impact on responses (Foddy, 1993). For example, Evans (1997b, 1998) found that she obtained different answers from the same interviewee (and drew different conclusions about the nature of job satisfaction) from when asking about job satisfaction to when asking about what made work fulfilling. This shows the way in which the researcher organises response material needs to be carefully audited. It is also more difficult to follow the chain of analytical reasoning of the researcher in qualitative studies when the response data are separated from the stimuli which produced them.

As a result of these concerns, the research findings in the report have been divided into two sections: a longer chapter (Chapter 4) organised around the structured interview questions, accounting for the responses to these questions and noting relevant follow-up questions, and a shorter chapter (Chapter 5) summarising these research findings under major themes. Chapter 4 makes extensive use of verbatim interviewee quotes to enable the voices of the participants to be heard directly, providing information-rich descriptions appropriate to the investigative methodology, and allowing the reader to
appraise the connection between responses and the questions which produced them. The reader may choose to bypass this chapter and read only Chapter 5, which is a briefer summary of results which largely omits references to specific interview data, and integrates research findings across questions, or, alternatively, to read only Chapter 4. In both chapters the discussion of research data is either combined across the three case studies or discussed separately by case study if particular differences between schools have been noted.

TRUSTWORTHINESS AND LIMITATIONS
The importance of considering bias in any form of research is widely acknowledged (Bogdan & Biklen, 2003; Lincoln & Guba, 1985; Miles & Huberman, 1994), and in research involving case studies, bias seems “more frequently encountered and less frequently overcome” (Yin, 1994, p. 10). Lincoln and Guba (1985) indicated that a particular source of bias which needs to be considered by the researcher seeking to establish trustworthiness derives from the influence of personal values and values underlying theory. The researcher must also show that conclusions drawn from the data logically follow from the methods used, and needs to address the degree of applicability of these findings to other contexts.

TRUSTWORTHINESS

Personal Background
At the time of the investigation the researcher had been teaching for an extensive period as a classroom teacher and then a leading teacher in a small, rural, government P-12 school in Victoria. His teaching experience was in the secondary area of the school as a teacher of Humanities, Psychology and English, with administrative experience as a senior school co-ordinator and in staff management. Relative to this research, this experience resulted in a more developed acquaintance and understanding of classroom teaching in the secondary (7-12) than the primary (P-6) sector, of administration and staff dynamics in a P-12 school rather than a primary or secondary school, and in a rural environment as distinct from a metropolitan school context.

Bogdan and Biklen (2003) strongly recommend that where practicable a researcher should avoid using research participants from within an institution in which they work
or with whom they have had significant previous contact, to protect voluntary consent and to control subjectivity. The researcher had no prior contact in any form with two of the case study schools (schools A and B) or with interviewees from those schools. In relation to the third school (school C), there had previously been occasional professional contact (once or twice a year) with a small number of the staff from the school, including one of the interviewees.

Establishing trustworthiness
Unlike experimental and quasi-experimental quantitative researchers, who by controlling variables seek to establish validity, reliability and objectivity in order to generalise conclusions (Freebody, 2003; Lincoln & Guba, 1985; Yin, 1994), there is no assumption in this study that its findings apply beyond the contexts from which they are generated. The investigation does not attempt to guarantee either external validity, which assumes that the sample is representative of the population (Yin, 1994), nor internal validity, which implies that the research describes a single, objective reality (Lincoln & Guba, 1985). Nor is it presumed that repetition of the research will yield similar results (reliability) (Yin, 1994), regarded as a condition necessary for validity (Lincoln & Guba, 1985). Each context is unique and therefore by its very nature a case study is not capable of replication (Yin, 1994), so trying to apply universal laws is not useful (Schofield, 2002). This study follows Lincoln and Guba (1985) in substituting truth value for internal validity, applicability for external validity, consistency and dependability for reliability, and neutrality for objectivity. Such a conceptualisation assumes that there are “multiple constructed realities” (Lincoln & Guba, 1985, p. 295) rather than a single reality, with truth value establishing the credibility of the link between the data and the conclusions drawn by the researcher, rather than a causal link between variables.

Credibility is best established through “prolonged engagement, persistent observation and triangulation” (Lincoln & Guba, 1985, p. 301), the test of completeness (Yin, 1994). Triangulation is widely recommended as a method of reinforcing trustworthiness in qualitative research (Bell, 1999; Bogdan & Biklen, 2003; Freebody, 2003; Lincoln & Guba, 1985; Miles & Huberman, 1994) by cross-checking conclusions through the use of multiple data sources, researchers, theories or methods (Patton, 1990). Triangulation in this investigation included the use of multiple sources (the three case studies) and
reference to field notes to support findings generated by interviews. Interviewees were also given the opportunity to check transcripts of interviews and to add or amend any information provided, a suggested method of testing or confirming findings (Miles & Huberman, 1994). Prolonged observation took place through multiple visits to each of the case study sites (see Table 3), with at least nine visits to each school, with field notes taken on each occasion.

Applicability requires giving sufficient thick description to enable a reader to assess the degree to which the findings can be transferred to other situations, in particular the nature of contextual similarity. This layer of detail is provided in the report of research findings in Chapter 4. Consistency and dependability involve noting recurrent patterns amongst phenomena rather than assuming stability and predictability, while neutrality does not assess the degree of researcher objectivity but the degree to which the data are confirmable (Lincoln & Guba, 1985). Developing an audit trail of data, analysis and processes enables the reader to follow a chain of logic from justification of methodology through data collection to data analysis and drawing of conclusions (Lincoln & Guba, 1985; Miles & Huberman, 1994; Yin, 1994). In particular, the process of data analysis should be clearly described, including how research material is compressed, arranged, selected and discarded. This was a reason for including two chapters of research findings, with the earlier chapter (Chapter 4) clearly linking interview questions with the data collected and enabling comparison with the thematic summary (Chapter 5).

LIMITATIONS
Patton (1990) noted that a researcher must be open and clear about a study’s limitations. In this investigation the limitations arose primarily from the nature of the qualitative research using intensive case studies, which meant the study was deep rather than broad, and subjective rather than objective. The three schools chosen represented approximately 1587 schools in the Victorian government system alone (DEECD, 2008) which could equally have been used for this research. The case study schools, each of a different type and all from the same administrative region, could not fully represent the myriad of variables which might have affected the complexity of organisational structure of schools across the state; such as location, size, leadership, administrative structure, priorities, student cohort and past history, quite apart from the people who
work in them. Moreover, within each of these three schools, the representativeness of the sample of staff interviewed cannot be assumed, nor the veracity of their perceptions, except in the consistency of observations between interviewees. There is also a temporal dimension, as what may be a school’s features at a particular point in time may not be the same a year or even a few months later, due to the impact of staff turnover, change in leadership or fickleness of attitudes. The importance of context is crucial and it should not be assumed that the findings can be transferred to other situations. It also needs to be pointed out that the study relied on the use of interviews. The use of alternative research methods such as surveys, participant observation or focus groups may have generated different perceptions and yielded different conclusions.

SUMMARY
This chapter has summarised the methodology and research design used in the study, including data analysis and report writing. It has also discussed the trustworthiness and limitations of the research. The following chapter provides an extended description of the research findings which relies heavily on the voices of the participants.
CHAPTER FOUR – RESEARCH FINDINGS

Findings from the research data are presented in this chapter. The first section of the chapter gives an overview of the three case study school settings. This is followed by a description of the interview sample, and then the findings from the interviews are presented. The chapter concludes with an analysis of recent SOS results from the three case study schools.

SCHOOL SETTINGS

The descriptions of the school settings were taken from field notes, comments from administrators, and general impressions gained during the time spent in each school. Each school also provided a staff list from which the information about staff composition is taken. It should be noted that not all staff lists took into account whether staff were full-time or part-time, and these lists were not necessarily exhaustive.

SCHOOL A

The first case study school, visited during 2005, was a primary school located in a rural growth corridor of new housing sub-divisions, not far from and within easy commuting distance of a regional town. At the time of interviews the school was rapidly growing and had nearly 400 students, with a core of older staff supplemented by younger teachers. The school was organised into composite year-level classes (e.g. prep-1) in order to maximise curriculum and teacher sharing, even though there were more than enough students to run separate classes at each year level. Teachers were paired together wherever possible to encourage teamwork and provide support for inexperienced teachers through working with a more senior colleague. The typical classroom in this school involved a large teaching space divided in two by concertina doors, meaning teachers could teach separately or combine classes as required. The school had an atmosphere of openness and welcome, evident amongst the staff, who clearly enjoyed working in the school and with each other. The school faced challenges of growth which placed pressure on physical resources, and changes in the student cohort leading to increased behavioural and well-being issues.

The staff list included an acting principal, two leading teachers, 17 full-time classroom teachers, three part-time teachers, and seven SSOs (integration aides and office staff).
Like most primary schools, the school had a preponderance of female staff, 80% of the staff listed. The incumbent principal and assistant principal were on leave in the period when the interviews were conducted.

SCHOOL B
The second case study school, visited during 2006, was a secondary school in a regional town. The school had suffered a decline in enrolments before the appointment of the present principal six years previously. At the time of the study the school had approximately 650 students and a stable staff, some of whom had been there for a long period. The current principal had brought considerable change to the school and was generally perceived to have turned it around, raising its profile in the community and enabling it to compete with other schools. However, staff expressed ongoing concerns about high workload levels and poor communication.

The staff list included a principal, two assistant principals, five leading teachers, 46 classroom teachers (including part-time staff), equally divided between male and female, and 10 SSOs (three integration aides, six office staff and a network manager). These figures indicate the higher staff/student ratio in secondary schools and the more even balance of male and female staff.

SCHOOL C
The third case study school, also visited during 2006, was a P-12 school located in a rural area but within commuting distance from a regional town. At the time of the study it had around 250 students, gradually increasing enrolments and a relatively stable staff, with a number of long-term teachers nearing retirement. In the past the school had been strongly rural in nature, mostly drawing students from the nearby farming community, but it had extended its student catchment to include students from surrounding areas, including the regional town. The current principal’s appointment four years previously had been unpopular with some staff who were still expressing concerns about her leadership style. There were internal differences between staff which were brought out in the interviews.

The staff list included a principal, assistant principal, five leading teachers and 22 classroom teachers, evenly divided between male and female (but more female primary
and more male secondary teachers), together with nine SSOs (integration aides, office staff, library and laboratory assistants), all female. Most staff taught in either the primary or the secondary area, with some crossover at Years 5 to 8.

**INTERVIEW SAMPLE**

The break-up of the interview sample by gender and staff type is shown in Table 5.

<table>
<thead>
<tr>
<th>School</th>
<th>Total</th>
<th>M</th>
<th>F</th>
<th>Principals</th>
<th>Assistant principals</th>
<th>Leading teachers</th>
<th>Classroom teachers</th>
<th>SSOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>School A</td>
<td>12</td>
<td>2</td>
<td>10</td>
<td>1</td>
<td>-</td>
<td>2</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>School B</td>
<td>12</td>
<td>4</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>8</td>
<td>1</td>
</tr>
<tr>
<td>School C</td>
<td>13</td>
<td>6</td>
<td>7</td>
<td>1</td>
<td>1</td>
<td>4</td>
<td>5</td>
<td>2</td>
</tr>
</tbody>
</table>

The interview sample was developed in co-operation with the administration in each school, which meant the researcher did not have direct control over its degree of representativeness. A good cross-section of staff was obtained in each school, including interviewees from each major staff sub-group. There were a large number of leading teachers interviewed in school C at the request of the school.

**INTERVIEW FINDINGS**

This section describes the data obtained during the interviews. The interview data are organised in order of interview questions under the headings of interview profiles, change factors, well-being, stress, morale and the SOS.

**INTERVIEWEE PROFILES**

This part of the interview, comprising questions 1 to 3, introduced the interview and developed profiles of the working lives of the interviewees, including their roles within the school. Question 3, which provided background information on previous educational experiences, is not reported on because the responses were not relevant to current attitudes.
Interview question 1: What positions/responsibilities do you have in the school, for example what classes do you teach?

Interview question 2: Would you mind telling me how long you have been teaching for in total and how long you have been in this school?

A summary of work roles and experience as provided by interviewees is given in Table 6.

Table 6
Interviewee profiles

<table>
<thead>
<tr>
<th>Interview</th>
<th>Gender</th>
<th>Status</th>
<th>Years School</th>
<th>Years Career</th>
<th>Role Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LT/A1</td>
<td>Female</td>
<td>Leading teacher</td>
<td>20</td>
<td>23</td>
<td>Class teacher with curriculum co-ordination role</td>
</tr>
<tr>
<td>T/A1</td>
<td>Female</td>
<td>Teacher</td>
<td>1</td>
<td>1</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/A2</td>
<td>Female</td>
<td>Teacher</td>
<td>4</td>
<td>27</td>
<td>Class teacher with curriculum co-ordination role</td>
</tr>
<tr>
<td>T/A3</td>
<td>Female</td>
<td>Teacher</td>
<td>4</td>
<td>8</td>
<td>Class teacher with well-being role</td>
</tr>
<tr>
<td>T/A4</td>
<td>Male</td>
<td>Teacher</td>
<td>3</td>
<td>3</td>
<td>Class teacher</td>
</tr>
<tr>
<td>S/A1</td>
<td>Female</td>
<td>SSO</td>
<td>2</td>
<td>10</td>
<td>Integration aide</td>
</tr>
<tr>
<td>T/A5</td>
<td>Female</td>
<td>Teacher</td>
<td>18</td>
<td>N/A</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/A6</td>
<td>Female</td>
<td>Teacher</td>
<td>3</td>
<td>3</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/A7</td>
<td>Female</td>
<td>Teacher</td>
<td>6</td>
<td>9</td>
<td>Class teacher</td>
</tr>
<tr>
<td>LT/A2</td>
<td>Female</td>
<td>Teacher</td>
<td>13</td>
<td>N/A</td>
<td>Class teacher with curriculum co-ordination role</td>
</tr>
<tr>
<td>P/A</td>
<td>Male</td>
<td>Acting principal</td>
<td>2</td>
<td>23</td>
<td>Administrator</td>
</tr>
<tr>
<td>S/A2</td>
<td>Female</td>
<td>SSO</td>
<td>10</td>
<td>10</td>
<td>Office assistant</td>
</tr>
<tr>
<td>T/B1</td>
<td>Male</td>
<td>Teacher</td>
<td>6</td>
<td>7</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/B2</td>
<td>Female</td>
<td>Teacher</td>
<td>7</td>
<td>7</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/B3</td>
<td>Female</td>
<td>Teacher</td>
<td>26</td>
<td>26</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/B4</td>
<td>Male</td>
<td>Teacher</td>
<td>17</td>
<td>28</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/B5</td>
<td>Female</td>
<td>Teacher</td>
<td>27</td>
<td>27</td>
<td>Class teacher with curriculum co-ordination role</td>
</tr>
<tr>
<td>LT/B</td>
<td>Female</td>
<td>Leading teacher</td>
<td>2</td>
<td>6</td>
<td>Class teacher with student management role</td>
</tr>
<tr>
<td>AP/B</td>
<td>Female, Assistant principal</td>
<td>19</td>
<td>19</td>
<td>Class teacher</td>
<td></td>
</tr>
<tr>
<td>T/B6</td>
<td>Female</td>
<td>Teacher</td>
<td>21</td>
<td>34</td>
<td>Class teacher</td>
</tr>
<tr>
<td>T/B7</td>
<td>Female</td>
<td>Teacher</td>
<td>23</td>
<td>35</td>
<td>Class teacher</td>
</tr>
<tr>
<td>S/B</td>
<td>Male</td>
<td>SSO</td>
<td>4</td>
<td>4</td>
<td>IT manager</td>
</tr>
<tr>
<td>T/B8</td>
<td>Female</td>
<td>Teacher</td>
<td>1</td>
<td>1</td>
<td>Class teacher</td>
</tr>
<tr>
<td>P/B</td>
<td>Male</td>
<td>Principal</td>
<td>6</td>
<td>N/A</td>
<td>Administrator</td>
</tr>
<tr>
<td>T/C1</td>
<td>Female</td>
<td>Teacher</td>
<td>9</td>
<td>27</td>
<td>Class teacher with well-being role</td>
</tr>
<tr>
<td>T/C2</td>
<td>Female</td>
<td>Teacher</td>
<td>18</td>
<td>32</td>
<td>Class teacher</td>
</tr>
<tr>
<td>LT/C1</td>
<td>Male</td>
<td>Leading teacher</td>
<td>20</td>
<td>25</td>
<td>Class teacher with student management role</td>
</tr>
<tr>
<td>T/C3</td>
<td>Female</td>
<td>Teacher</td>
<td>4</td>
<td>4</td>
<td>Class teacher</td>
</tr>
</tbody>
</table>
This table shows considerable variation in interviewees’ educational experience and time spent in their current schools, ranging from three newly-appointed graduate teachers to one staff member who had been in the same school for 32 years. The average period of time interviewees had spent in school A was seven years, and 13 years in schools B and C. The average educational experience of interviewees was 12 years in school A, 19 years in school B, and 23 years in school C. The figures point towards school A as having a younger and relatively newer staff than the other two schools. They also show that many staff in all three schools had spent much of their careers in the same institution with little recent experience of other schools.

The study included SSOs as well as classroom teachers and those in leadership positions. During the interviews the SSOs clearly perceived themselves as staff and shared many of the job-related attitudes of classroom teachers, though they were aware of having a different status from them (despite some SSOs having had teacher training). The work roles of classroom teachers varied according to their teaching expertise, the age of the students they taught, and any administrative responsibilities they might have undertaken. Leading teachers, whose work involved a significant leadership responsibility as well as a teaching load, expressed the feelings of classroom teachers mixed with the more policy-driven attitudes of leadership. Those in the principal class (principals and assistant principals) naturally looked at the global health of the organisation and how the needs of staff fitted into long-term organisational goals. In general, staff in their first two or three years of teaching seemed to be generally more positive and enthusiastic about their work than older staff. Interviewees newer to teaching (e.g. T/A4) attributed this to the novelty of the job and being able to
concentrate on teaching, less encumbered by administrative and family responsibilities, while older staff (e.g. LT/C4) mentioned being in a career plateau or close to retirement.

CHANGE FACTORS
This part of the interview, comprising question 4, examined interviewees’ perspectives about changes occurring in their schools. The perceived change factors are discussed separately by school.

**Interview question 4: Has this school changed over the period you have been in it? If so, in what ways?**

This question was asked in 33 interviews (four interviewees were new to the case study school), with answers depending on interviewees’ length of personal experience in their current positions. Perceived change factors varied between schools. Interviewees mentioned school growth in school A, a principal-imposed change in direction and expectations in school B, and a combination of factors including curriculum reform in school C. The views of the principal or acting principal are given before those of staff for each case study.

*Change factors (school A)*
The acting principal of school A, a leading teacher, who had come to the school in the previous year, noted that there was a lack of documentation and no induction program or succession planning when he arrived. He observed that many staff “still work as if we’re a small school” (P/A/7) and assumed people knew their roles. With the growth in the school and greater number of classes, teachers did not need to talk to other people outside their area and could form “their own separate little entity” (P/A/7), meaning good communication was becoming more difficult. Another outcome of the increasing enrolments was the pressure on the physical capacity of the school without extra financial benefit, although a larger staff meant more roles could be covered. The acting principal considered student well-being to be an increasing priority as the school had “a lot more kids coming from difficult backgrounds” (P/A/8) and thought teachers would be happy to teach larger classes if they could concentrate more on teaching and learning, and less on discipline and counselling.
Staff who had been in the school for longer periods described changes which had occurred in the area, as what had been “a really small country town” (S/A2/7), “a total rural environment” (T/A5/7), had become a satellite city of the regional town, part of the commuter belt, with the population growing and changing. School students no longer came from predominantly farming families but “ten-acre blocks and small houses” (T/A5/7), and “no-one’s on farms any more” (LT/A1/2). The school had correspondingly grown from much smaller, rural origins with only a few staff, to becoming a much larger institution, with corresponding impacts on school practice and student behaviour (LT/A1, T/A7). Interviewees noted that the core of experienced staff had been supplemented by younger teachers, due to the policy of employing graduates (LT/A2), with “new staff coming in . . . and a few leaving” (T/A6/4). They believed that, despite the changes, and to some extent because of them with the influx of younger staff, the school had maintained its positive culture (T/A3) and was a “dynamic” (T/A2/3) environment, unlike other nearby schools which had stagnated due to lack of staff turnover (T/A5). The school had retained a “country school atmosphere” (T/A2/4), no longer quiet but still great to work in. The school was part of a strong community (T/A7) and maintained “a real feeling of community and belonging” (S/A1/6).

Staff noted that growth of the school meant that it now had less physical space, as playground equipment and playing areas for students had been removed and not replaced (T/A2, T/A5). Staff also did not know each other as well and nor did the students: “when I first came, by mid-year, everyone knew everyone” (S/A2/7). Some older staff still behaved as if they were in a small school, keeping core knowledge and responsibilities to themselves rather than sharing it with others (LT/A2). The staff had also observed student changes which were manifested in more challenging behaviour in the classroom and the playground (T/A2, T/A3). Some children needed to be monitored closely and their teachers, particularly newer teachers, supported in coping strategies to deal with them (T/A7). It was felt that there were more students with special needs, necessitating the introduction of more well-being programs (T/A5), as well as more students coming from a broader cultural background (T/A4). There had also been corresponding changes amongst parents, more of whom were working people with commitments who tended to be less involved in the school, some seeing it as a “great baby-sitting service” (S/A2/7).
Change factors (school B)

Unlike the primary school where major changes were the result of external forces, recent change in the secondary school had come from within, following the appointment of the current principal six years previously, who had engineered change in order to reverse declining enrolments and alter community perceptions. The principal described how when he arrived he had found “a very tight school culture, insular . . . us against them” (P/B/1), with staff who had been there a long time. He realised that there was a challenge to change the school culture of low expectations of student outcomes and excuse-making for poor performance. The principal interviewed every staff member and found a core group of staff “who did want to change and were really keen to make things better for the kids and for themselves” (P/B/1), using them to promote change. His focus for improvement was on making the school as good as any other in the State through raising levels of staff and student performance and building up community perceptions. The principal began immediately with “really simple things” (P/B/2) such as enforcing uniform policy and targeting student attendance and behaviour, the “structure was tighter, the kids were in class” (P/B/2). He introduced positive initiatives such as a sports academy and better computer technology, and made changes to the school’s physical environment, removing portable classrooms and opening up courtyards to encourage pride in the school and respect for learning. He felt that his goal of improving student results began to be achieved “when staff saw that that was possible, and kids could see that was possible” (P/B/3).

However, reforms to the school were not made without “substantial opposition” (P/B/4) from some staff and there were “demanding times” (P/B/4) when he had to direct staff to carry out duties, though he felt had the mandate of staff to implement change. The principal closely monitored staff performance, including attendance at meetings, adherence to timelines and documentation of curriculum. A particular focus was staff unity. He found that the leadership team lacked cohesion, with people not carrying through on decisions that had been made, and reformed it accordingly. Changes in staffing followed as “some people left because it no longer suited them, and some people were encouraged to leave, and some people weren’t given much of an option” (P/B/5). He realised the importance of staff new to the school developing the right culture and instituted a strong induction program.
Overall, the principal thought that he had achieved many of his goals and the school was now in good health, with a clear vision supported by appropriate processes which were reflected in day-to-day operations. Staff had grown as leaders and teachers, and developed pride in the school, leaving behind those “not on board” (P/B/6). The principal indicated he was now trying to develop a more distributive leadership style, spending time talking to staff “individual to individual, rather than teacher to teacher or principal to teacher” (P/B/5), and fostering leadership capacity in his leadership team.

Staff agreed that the current principal had been directly responsible for the majority of change in the school and that the direction of the school had changed for the better (AP/B, T/B5). They described how with staff input the principal had identified areas that needed changing, probably “ones he thought of anyhow” (T/B1/5), and begun an improvement program. They felt that he had generally increased student expectations by changing the culture and making students more accountable for their actions (S/B4, T/B2, T/B5), tightening up behaviour, discipline and uniform (T/B1, T/B6). Students had a better perception of the school and had raised their aspirations to a degree (T/B1). The principal had tightened up on teachers too, increasing overall professionalism (AP/B, LT/B, T/B6) and introducing a more innovative curriculum (T/B5). Changes in leadership structure meant more accountability of student managers, with a move to year level rather than subject-based teacher organisation (T/B7), and “lots of people put into teams” (T/B1/4). The school had a different feeling to it, more unified and demanding, previously it was “just kind of all nice and everything” (T/B2/6) with “rules that weren’t followed through” (T/B2/6). The school had benefited from the employment of more graduate teachers who were felt to have strengthened an established, ageing staff (T/B6, T/B7), who were “pretty stagnant” (T/B3/3). The assistant principal commented that the school may not have stayed open unless the changes had occurred. She felt that the school was a better place because “kids know the boundaries” (AP/B4) and parents valued education more: “if you want to provide a quality education your parents should be complaining all the time” (AP/B/5). The staff had also observed physical changes to the school (T/B3, T/B6, T/B7) such as new buildings, new technology, and the planting of gardens: “the place looks fabulous, it’s just a really nice place to be in” (T/B5/3).
In general the changes in the school were thought to be necessary and mostly for the good (LT/B/3, T/B3, T/B4, T/B6, T/B7), “as long as everyone is pulled along for the ride” (LT/B/3). However, a number of the reforms had been hard to take at first (T/B6), as there had been “some fairly harsh measures” (T/B5/4). Staff also indicated that there had been costs to them in terms of workload and pressure. It was felt that the “remorseless” (T/B1/4) and “constant, ongoing change” (T/B1/4) with new programs constantly introduced and meetings at least three times a week (T/B2), had worn away at staff: “it just never backs off” (T/B1/6). The changes had resulted in an increased workload for staff which was creating stress and fatigue, and affecting morale (T/B2, T/B6), people being sick of the heavy work demands (T/B1). An alternative view was put by the assistant principal who justified the level of workload through the need for staff to be on board with new practices. She felt staff needed to be constantly improving their teaching, rather than blaming poor outcomes on students (AP/B). She criticised dissenting staff who “feel that they don’t have the opportunity to speak up” (AP/B/8), but didn’t volunteer to represent staff when they had the chance to do so.

**Change factors (school C)**

Both principal and staff in school C agreed that the main change issues in the school were curriculum reform and an element of the staff who resisted change in general. The current principal reported that when she had been appointed three years previously, she had come into a “fairly hostile” environment (P/C/4), with a section of staff unhappy that the acting principal had not been appointed to the position, and she had had difficulty in implementing reform. Her view was that staff had got used to a comfortable existence and that though some were highly motivated and wanted change, others preferred to “hide and not be known” (P/C/5). The complexity of a P-12 school with the natural divisions between primary and secondary staff also made things more difficult. The principal had concentrated on middle years (Years 5 to 8) curriculum reform, which she felt perhaps she had pushed too quickly as she was used to working with a unified team who generated their own momentum (P/C).

The staff described the school as having a stable workforce with low staff turnover (T/C4), though there had been a few recent retirements of older staff who had been replaced by younger graduates, a pattern which would increase in future (LT/C2, LT/C4). This introduction of new blood was a positive step, increasing the degree of
enthusiasm and willingness to accept change (AP/C, S/C2, T/C1), although keeping an experienced group of staff was also thought important (S/C1). Difficulties in coping with change of some staff were widely commented on, both in self-reflections and in observations of other staff (AP/C, LT/C1, T/C1, T/C4). For these staff, used to a certain way of doing things, change was “a dirty word . . . why should we change, we’ve done it like this for fifty years” (T/C1/6). They were felt to resist new initiatives or changes to workforce roles and “get in a huff very quickly” (T/C4/7). The assistant principal noted that “some of the people have been here far too long, and are too set in their ways and are very closed to change” (AP/C/5). Staff described the opposition to the appointment of the present principal (T/C1, T/C4) and indicated that there were still a few dissatisfied staff (LT/C2, T/C4) who thought she was “a primary principal who at times . . . puts some of the secondary offside” (LT/C2/10).

Much staff unhappiness was directed at government-mandated curriculum reform introduced by the principal (LT/C1, T/C4) which was “rechurning” old teaching practice (T/C2/5), blurring disciplines by the move to integrated studies (LT/C2/7), and making good teaching irrelevant (LT/C2). However, other staff supported the curriculum reform (T/C1, T/C3), feeling it required staff to change their teaching for the better and move beyond their comfort zones (T/C1). They believed that the principal had tightened the educational direction in the school by creating more accountability and improving organisation, and the change had not been excessive (AP/C, T/C2); some staff just preferred to “sit back and whinge” (T/C2/8).

Interviewees also felt that the school had changed its student base, with a greater number of students from a non-rural background (LT/C1), though most were still “country kids” (T/C1/8). This was associated with some increase in behavioural and well-being issues (LT/C4, T/C1), more students having the attitude “I don’t want to be here, and it doesn’t matter what you do” (T/C2/5). Overall, the school was less community-orientated than it had once been (LT/C4, S/C1) and parents had less realistic expectations of the school (T/C1).

WELL-BEING
The well-being section of the interview contained four questions (questions 5 to 8), concerning the nature of well-being, how well-being could be improved amongst staff,
what gave the interviewees job satisfaction, as well as asking interviewees to give a personality self-description.

**Interview question 5: What do you think is meant by the term well-being?**

This question was asked in 34 interviews. In answering this question interviewees mentioned characteristics of well-being such as its holistic nature, its connection to health and happiness, low stress levels, a sense of job satisfaction, and feeling supported. Definitions were common across the three case studies.

Well-being was perceived as incorporating all aspects of life and health working together (AP/B, T/A6, T/B7) and was “holistic” (T/C1/9). It meant maintaining a general feeling of mental, emotional, physical, social, and spiritual health and happiness (P/C, S/A2, T/A1, T/B7/6, T/C1), “feeling happy and healthy . . . within yourself” (T/A6/5), having a healthy mind and a healthy body (LT/B). Interviewees related well-being to job satisfaction. They felt it involved looking forward to work, wanting to come to work, enjoying work, and working to capacity (AP/C, LT/A2, P/C, S/A1, T/A2, T/B1, T/B4, T/B5, T/B6): “being happy in your job” (T/C1/9), as “my job affects my health” (T/A4/6). A high level of well-being meant coping with work demands and being able to deal with work-related stress (AP/B, LT/A1, S/B, T/B3, T/B6): “what’s worth getting upset about” (T/C2/10), so “the job doesn’t get to you” (S/A2/9). It included feeling healthy and relaxed at work, and performing at an optimum level (T/A5, T/C3), resulting in high levels of energy and morale (LT/C4, T/B1). Those responsible for well-being should therefore look after the mental and physical health of staff, controlling and reducing workload and pressure (LT/C1, T/B1, T/B2, T/C5). They needed to keep staff happy and positive (LT/C1, T/B2), ensuring they are teaming well with other staff, while keeping a focus on student outcomes (LT/C1).

Well-being had a further social component of being supported (LT/A1, T/B6). Staff needed to feel acknowledged, appreciated and valued (AP/C, LT/C1, S/C1, T/A7), to be told they were doing a good job (S/C1), so that they felt good about themselves (LT/A1/4), “honoured and respected in your position and role” (S/B/5). It was felt that the onus was on leadership to support staff, both professionally and personally, for example: helping with student behaviour management, making teachers feel “you’re not
out there alone” (T/B8/5), not “it’s your kid, shut the door, you deal with him” (LT/A1/4), or “just listening and caring” (T/A7/8). Simply having someone aware of the problems she faced was enough to raise levels of well-being of one interviewee (LT/A2).

One staff member thought teacher well-being decreased with age, that younger people had that “natural enthusiasm and energy” (LT/C4/8). Other interviewees mentioned student well-being, keeping students safe and supporting their needs (S/C2, T/A7). An administrator thought well-being could be a double-edged sword, what some individuals might see as important for their own well-being might not benefit the school as a whole (AP/C). Overall, well-being seemed to be a perception of self which extended well beyond the immediate work context and its influences, with an implied obligation on the employer to monitor and control the impact of work on an individual’s overall health, and of their overall health on their work.

**Interview question 6: What, in your opinion, could be done to improve staff well-being in this school and who should make this happen?**

This question was asked in 34 interviews. A number of interviewees had already referred to the onus for improving well-being in their previous answer and most tended to focus on the first part of the question. Responses varied from school to school, so are given separately by case study. There were fewer perceived well-being issues in school A than in the other two schools. Relieving workload pressure was a common theme in school B, while in school C, interviewees mentioned staff personalities and resistance to change. There was general agreement that well-being could be improved by giving staff more time to get tasks done, greater acknowledgement and support from leadership and other colleagues, and encouraging informal social interaction amongst staff. Administration was generally thought ultimately responsible for staff well-being.

**Improving staff well-being (school A)**

Many interviewees in this school thought that well-being of staff was already a key organisational value without much that could be improved on (S/A2, T/A1, T/A4, T/A5, T/A7). The concern for well-being in the school was particularly manifested in high level support for staff from the administration: “if you need to talk to them about
anything, you can approach them” (T/A1/4). If staff were sick, they were told to go home and their work covered (S/A2), and if leave was needed, it was given, there was no “guilt trip” (T/A5/11), reflecting a philosophy that “you’ve got to keep your own life in order to be able to perform at your best” (T/A5/11). Well-being in the school was enhanced by close links between colleagues (T/A4) and by relaxed social interaction which was promoted by the administration (T/A5, T/A7), giving staff a chance to “look after ourselves” (T/A5/11). Despite busy times, staff did not feel overloaded with work (T/A4). Suggestions to improve well-being included maintaining and further developing unity, openness, communication, and support in the school (LT/A2, T/A2, T/A3). Interviewees mentioned encouraging staff to speak up about issues they had concerns with (LT/A2), continuing to have regular social events (T/A5, T/A6), so staff “get to know each other a little bit more” (T/A6/8), and reducing length of meetings (T/A6). The leadership team was thought ultimately responsible for well-being, but everyone was expected to play their part in helping the school to run well (LT/A1).

Improving staff well-being (school B)

The main well-being priority for staff in school B was thought to be acknowledging, monitoring and reducing workload pressures. Though they understood the need to implement educational initiatives and improve student outcomes (T/B2), interviewees found the level of work expected of them beyond the classroom exhausting, adding pressure and using up energy, reducing informal planning time, and giving staff no time to stop and talk (T/B1, T/B5, T/B6, T/B7). A particular concern was the number and length of compulsory meetings (T/B1, T/B5, T/B6, T/B/8), which were thought to be “very planned, no-one’s allowed to escape, the net closes in” (T/B5/5).

Interviewees thought improving staff well-being would require administration reducing the number of educational reform programs with which teachers were involved, as “we don’t have the time to do any of them properly” (T/B2/8). This would give teachers more control over their time instead of having to always work within an imposed structure (T/B6). They also wanted more acknowledgement of their work (T/B1) and greater awareness and education about stress. They suggested introducing relaxation strategies such as yoga, meditation and a chill-out room, as well as more informal social functions (T/B3, T/B4, T/B7, T/B8). One interviewee reflected on his own well-being, about learning to pace himself and give himself a break (S/B). The assistant principal
thought staff well-being was adequately addressed already. She felt that staff needed to take more responsibility for well-being issues, for example, the tendency of people to avoid the staffroom or sit by themselves: “somebody needs to do something” (AP/B/9).

**Improving staff well-being (school C)**

There were a range of views about how to improve well-being in this school. Workload was one issue mentioned, including reducing the number of meetings (LT/C1, T/C2), which would leave more time for group planning sessions and extra voluntary work around the school (LT/C1, T/C5). It was also thought important for administration to acknowledge and value staff (LT/C2, S/C1, T/C1), “tell them they’re doing a good job” (LT/C2/11); including those with experience, and staff who were not often recognised (AP/C, S/C1). Other suggestions for improving well-being were better facilities (T/C1), improved communication (T/C3), access to counselling (S/C2), and more opportunity for relaxation and informal staff social interaction, enabling people to get to know each other better (T/C3).

A number of interviewees, particularly administrators, expressed the view that some staff well-being issues in the school were not easily addressed. These included staff jaded with teaching, who were resistant to change, or who had unreasonable perceptions of workload (LT/C3, LT/C4). It was felt such staff needed to understand the long-term benefits of school progress and take more responsibility for improving outcomes and confronting problems (LT/C3, P/C, T/C4). Instead there was a tendency to undermine the good work of others through negativity (LT/C3, P/C), sitting back and complaining: “whose bloody idea’s this?” (T/C4/16)

**Interview question 7: What aspects of your work give you job satisfaction? Could you describe for me an experience which has given you particular satisfaction?**

This question was asked in 36 interviews. Most responses to this question focused on having positive experiences with students, either directly through classroom teaching, or indirectly through the provision of ameliorative programs. Other factors mentioned included the challenge of teaching, the achievement of ex-students, good feedback from parents, and staff social interaction. Some interviewees also mentioned negative aspects
of the job or what detracted from job satisfaction. The responses had common elements across the three case studies.

**Interaction with students**

The centrality of students to job satisfaction was apparent in all three schools. It was particularly direct in school A, the primary school, where the focus of most responses was references to the kids and enjoying being in the room with them (LT/A1, LT/A2, T/A2, T/A4, T/A5). This was often expressed through emotional attachment: “I love just the way they think, and what they say, and what they do” (T/A5/13); “I love the tough kids” (LT/A2/13). The attachment seemed particularly strong for younger children: “I love the preps, the preps crack me up” (S/A2/13); “you look at their little faces, and they’re there, and they’re eager to learn, and they really do love you” (T/A7/11). For teachers of these students this was associated with a strong sense of responsibility: “you’re like a mother, you’re a career, you’re a social worker, you’re a nurse, you’re all of those things” (T/A7/12). An ingredient in this job satisfaction came from seeing measurable student progress and feeling responsible for it (S/A1, T/A2). Examples given included helping students with difficulties learn to read or write (S/A1, T/A6), watching a class develop (LT/A2, T/A2), and improving teaching skills, thinking: “I’ve made a difference” (T/A2/6). Some interviewees recalled instances when they had become aware of the strength of their impact on students. One teacher, who had briefly been at a small, country, primary school many years previously, was at a party when an unknown man told her: “I’ve spent my life loving you” (T/A5/16), “our school was never as happy as when you were there” (T/A5/16). Another interviewee recalled a girl complimenting a boy by saying how much he’d helped her: “when you answer things I listen and think” (T/A7/14). Just that one comment made the year worthwhile: “I’d shown her how to learn from someone else” (T/A7/14).

The main focus of job satisfaction in school B was also on students (LT/B6, T/B1, T/B2, T/B3, T/B7, T/B8), liking teaching and working with children (T/B3, T/B5). Making a measurable difference was also important to staff in this school: “seeing the kids succeed and be happy and achieve things” (LT/B/6), the progress of a class or home group (T/B1) and students making a leap in learning (T/B2, T/B8), “those light-bulbs of moments” (T/B2/9). Specific examples of job satisfaction included getting a student work placement (T/B7), having a student excited about speaking a foreign
language (T/B2), and students appreciating the art work of others (T/B3). A teacher of history described in great detail her pleasure in planning activities that students “get a buzz out of” (T/B8), such as organising a mock medieval day complete with tournament, costumes, feasting, music and games: “It’s real teaching, isn’t it? You sort of know that within yourself” (T/B5/11). Job satisfaction also came from working with students individually to help them with well-being issues, such as changing the attitude of a school refuser (T/B6) and giving a student advice which “made a real difference” (LT/B/6), feeling “you can help kids” (T/B6/8).

Job satisfaction in school C also related to students. This was evident across both primary and secondary sectors of teaching (AP/C, T/C1, T/C2, T/C3): the “core business which are [sic] the kids” (AP/C/10), “the kids, I’m here for them” (T/C2/11). Job satisfaction came from seeing students improving and succeeding (LT/C2, LT/C4, T/C1, T/C4), the intrinsic satisfaction of contributing to their academic progress and personal growth (T/C2, T/C3): “to see them grow and take off, that really gets to me” (T/C2/11), “every moment when a kid gets it and makes a leap forward” (LT/C3/9). Job satisfaction for a young language teacher came from students showing they enjoyed her classes by greeting her in the corridor in the new language: “that’s fun, that’s really cool” (T/C5/6), while for student managers it came from assisting students to overcome adversity (LT/C1, LT/C2).

**Other sources of job satisfaction**

A range of other sources of job satisfaction were mentioned by interviewees across the three case studies, most of which arose from developing programs and activities outside the classroom which benefited students more indirectly. Staff gained job satisfaction through being responsible for organising overseas trips (T/C5), and school camps, excursions and community evenings (T/A4, T/B6), “just being able to see the kids in a different light” (T/A4/10). They described devising literacy programs (LT/A1), writing curriculum and having it used (LT/C3, T/B4), and organising an environmental conference for students, which helped them “develop confidence and optimism” (T/C3/6). Librarian gained job satisfaction from making their workspaces places to which people wanted to come (S/C2, T/B7), while a computer technician took pride in having a network upgraded and running smoothly, the “things people don’t see” (S/B/6)
A further source of job satisfaction came from positive feedback, such as appreciative comments from parents, ex-students or other staff, both at work and away from it (S/A2, T/A2, T/A5, T/B7, T/C1). This feedback validated their work as teachers and lifted self-esteem: “you must be reaching somebody somewhere” (T/A2/5), “knowing that the efforts that you’re putting in have been recognised” (T/B7/8). Meeting former students provided particular vindication, hearing of their accomplishments as adults and seeing their success in life (LT/C2, T/B/4), having ex-students become teachers themselves (LT/C4, T/A5), or just meeting them in the school yard: “they haven’t forgotten me” (T/A7/13). Feedback was especially important for principals because they were removed from classroom teaching. Feedback for them took the form of staff appreciation (P/A, P/C), hearing people talk positively about the school (P/B, P/C), or being told that you’re doing a good job, that “the school’s still in the same postcode, I haven’t totally ballsed it up” (P/A/13). One principal referred to the “really little things” (P/C/11) like a thank you letter from a parent.

Being part of the staff social group also gave satisfaction to some interviewees (S/A1, T/A3, T/A5), the friendships making it more of “a happy thing to come to work” (T/A3/9). Administrators mentioned gaining satisfaction from finishing tasks, implementing initiatives, and constructively assisting staff with problems (AP/B, AP/C, P/A, P/B). For an experienced principal, job satisfaction meant walking round seeing “really happy, effective teachers” (P/B7), and students who were learning and enjoying themselves, without him having any “immediate impact” (P/B/7).

Dissatisfiers and attitudes to teaching
A number of dissatisfiers were also mentioned by interviewees discussing job satisfaction. Foremost amongst these was frustration caused by administrative tasks such as writing up curriculum or running assemblies (LT/B), which took teachers out of the classroom and away from working with students (LT/A1, P/A, T/A3), perceived as the real source of job satisfaction (LT/B, P/A). Work pressures on administrators meant that “sometimes the kids get forgotten” (LT/B/6). A student comes past in the yard and there is no time to stop, “that kid really wanted to talk to you, and you had to brush them off” (LT/B/6). Administrators also complained of the sheer weight of work (P/A), not being able to plan for the future because of the reactive nature of the job (P/A), and problems in dealing with staff where “their only concern is their well-being, and not so
much what’s happening with the kids around them” (AP/C/11). Classroom teachers described dissatisfiers such as poor student results (LT/C4) and students behaving badly or not doing the work (T/C4), which “sometimes saps a bit of the enthusiasm and enjoyment for the job” (T/C4/11).

Some interviewees used the question to express other job-related attitudes, linking job satisfaction with job values and motivation, particularly the centrality of students to teaching (T/A3). This was reflected in comments such as: “obviously the children give you satisfaction, if they didn’t, you shouldn’t be in the job” (LT/A1/5); and: “that’s what you’re here for, that’s why you do the stuff that you do” (T/C4). Other interviewees emphasised the importance of job satisfaction and liking teaching as a career (T/A2, T/A5, T/B7): “you certainly wouldn’t do it if you didn’t enjoy it” (T/A2/6). Interviewees also described elements of the role which they thought were particularly important, such as carrying out the job well (LT/C3, S/A1, T/A3), opportunities for personal growth (T/A1), and running well-being programs to help students express their feelings (T/A3) because “it means a lot to me” (T/A3/9).

**Interview question 8: Researchers have suggested that there are links between personality and experiences of well-being. If you were to describe your own personality in three or four words, what words would you use?**

The question was asked in 36 interviews. Full answers are given in Appendix E. Some interviewees found this self-evaluation question difficult to answer (LT/A2, LT/C1, P/C, T/A6, T/B2): “don’t you hate it when you have to describe yourself” (LT/A2/14); “I hate these sort of questions!” (T/B2/22) Others were concerned their descriptive words might be contradictory (AP/B, T/C2), had problems keeping it to four words (T/A1), or commented on the introductory statement, agreeing that personality did affect well-being (T/B8).

Some of the most commonly-used words used by interviewees were: happy (7 times mentioned), caring (6), positive (6), easy-going (5), outgoing (5), friendly (4), optimistic (4), approachable (3), and honest (3). If anything, these words indicate a positive attitude towards life and staff seeing themselves more as carers than managers. There were no obvious differences in personality self-descriptions between school contexts or
between primary and secondary staff, except that the word “happy” was used five times by interviewees in the first case study.

STRESS
This section comprises questions 9 to 11 which covered construction of stress, experiences of stress, and interviewee perceptions of common causes of stress amongst staff.

Interview question 9: One of the concepts I am interested in exploring is that of stress and how it impacts on the way teachers do their work. Could you tell me what the word stress means to you?

This question was asked in 35 interviews. All interviewees were able to give an interpretation of stress, though a few indicated they didn’t suffer much from it. Stress was mostly defined as a negative, though some positive aspects were also mentioned. Definitions included psychological and physiological characteristics, as well as effects on daily functioning, and were common across the three case studies.

Stress definitions
A common element of definitions of stress was a sense of being overloaded or overwhelmed (LT/A1, LT/B, T/A4, T/B1, T/C1) by an all-consuming build-up of events (LT/A1, LT/B), resulting in an inability to cope (T/A5, T/C2, T/C3). There comes a breaking-point as it all gets too much to bear (T/A5, T/B7, T/C8): “something’s got to break” (T/A5/17); “you can’t keep going any more” (T/A7/14). Stress was associated with a loss or lack of control (AP/C, LT/A2, LT/C3, S/B): “where the situation or the outside is controlling you, not you being able to control you” (P/A/15); there were “things that I couldn’t do anything about” (LT/C3/10). Stress was strongly linked with emotional qualities, such as a build-up of anxiety (S/C2, T/A2, T/A7, T/B5), which “totally consumes your thoughts” (S/A2/16), and feelings of nervousness, unhappiness and being under pressure (LT/C4, T/B8). It involved a sense of being unsupported (AP/C, T/B8), “feeling alone and that no-one is aware of what you’re going through” (TB/8/8). Stress also has physiological symptoms such as difficulty in sleeping, fatigue, headaches, panic attacks, and feeling unwell and rundown (LT/B, S/C1, S/C2, T/A3,
T/C2). Interviewees recognised stress through being “very flat all the time” (T/B7/9) and “tension at the back of my head, stomach, and slight breathlessness” (T/B5/12).

Many definitions of stress included changes in cognitive function such as a sense of confusion or disorganisation (LT/A2, T/C1), which impacted on normal behavioural functioning and productivity (LT/B, LT/C4, S/C2) and was exhibited in reduced effectiveness at work. Stress was thought to result in an inability to prioritise, keep up with work demands, and meet deadlines (LT/A1, LT/B, T/B6). Interviewees described a lack of achievement, of having too many things to do and not being able to carry them out (AP/C, S/B, T/A3, T/B1, T/C5). Stressed staff were thought to struggle to meet their own expectations (AP/C, S/A2, T/C/5): “I can’t do my job properly” (T/C1/13), “the things I think should be done” (S/A1/16). Interviewees noted changes in coping capacity (T/C2), including an inability to deal effectively with people (LT/B), and an over-reaction to minor problems (T/A2), as “things start to get you down, that normally wouldn’t get you down” (T/A4/12). Quality of teaching in the classroom may also be affected (LT/C2), as teachers find “students not working as well as you want” (T/B6/10). Life outside work is also impacted: “your work suffers and home life suffers as well” (S/C1/10).

A number of interviewees also mentioned stress as a positive in stimulating people to do things (LT/C4, T/B1, T/B7, T/C3): “stress can make me do work at seven o’clock of a Sunday night when I’ve got a class next morning” (T/B7/9). However, positive stress was perceived as limited in time and degree. It was thought “you need a bit of stress to keep you motivated” (T/C3/8), it can “let you perform higher” (LT/C4/11), but only “over a short period of time” (LT/C4/11).

Stressors and experiences of stress
In giving their understandings of stress, interviewees also referred to perceived stressors. They explained that factors causing stress may derive from any part of life: “coming from your family or it could be coming from your school, it could be coming from health” (S/C2/6), from the work environment, such as student issues and time pressures (T/B5, T/B6), or from personal life (LT/B, S/A2, T/A1, T/A6). The influence of personality was recognised by some staff: “the smallest thing I just worry about . . . I’m kind of a bit of a perfectionist” (T/A6/13). A few interviewees indicated that they
hadn’t experienced a great deal of stress themselves (LT/A1, T/A4, T/A7): “I’m not the most stressed bloke often!” (T/A4/12); “I don’t think I’ve ever felt stress in my job” (T/A7/14), or were too busy to be stressed (AP/B).

Some interviewees outlined their own experiences of stress in answering this question, often in some detail. These examples tended to be characterised by a cumulative build-up of stressors (T/A5, T/B4): “there were just too many things” (T/A5/17), “a cluster of so many things you would not believe” (T/B4/12). They included the multiple demands of home, farm and work (T/A5), and the combination of the death of a close relative through cancer, along with domestic and work pressures (T/B4). Staff described impacts of stress both in the past: “bit by bit, the kingdom fell down” (T/B4/12), and ongoing: “I love being in the classroom still, but things are pretty dark elsewhere” (T/B5/12), and reflected on effective coping techniques such as meditation, yoga, and getting fit (T/B4, T/B5).

**Interview question 10: Can you describe for me an example of where you have been stressed at work (if there is one) and what effect it had on you?**

This question was only asked in 11 interviews as many interviewees had already given examples of stress as part of their previous answers. The examples provided ranged in type and apparent impact from person to person. A particularly intense experience related by an interviewee (S/A1) referred to an incident a number of years previously at a former school, a small, rural, primary school. A number of older boys had started a fight in the yard which the staff couldn’t stop, on a day when there were no male staff present, and they had to ring for help from the police (S/A1). There were “girls screaming, running” (S/A1/20) and “everyone was crying” (S/A1/20). Staff were told they shouldn’t have rung the police, and given one day off for stress on rotation by the government: “you can’t all be stressed on the one day” (S/A1/19). The school later took out an intervention order against one of the boys’ mothers, and staff had to watch out for her car, “everybody was on edge” (S/A1/17). The major factor which seemed to distress the interviewee was the inability to protect children in her care, along with the lack of adequate support. This example emphasised the strongly emotional basis to memories of stress and their potential to retain great impact even after some time has elapsed.
Another more recent experience of stress recounted by an interviewee involved being confronted by an angry parent at a parent-teacher evening the previous week who felt the teacher didn’t like her child and was “fairly aggressive” (T/A3/14). The interviewee stayed calm, though she herself was cross and “shaking a little bit” (T/A3/14), although earlier in her career she would have been in tears. She felt better after discussing the issue with the acting principal and receiving his support. The interviewee regarded the criticism as being particularly unfair as the parent hadn’t seen her teach: “we’re still people and there’s somebody who’s attacking . . . the core of who you are” (T/A3/15); “I care a lot about the kids in my grade” (T/A3/16). This example seems to highlight the emotional vulnerability of teachers in relation to their work.

Other examples of work-related stressful situations, generally described more briefly, included conflicts with other staff members or with the principal (LT/C1, LT/C2, S/C1, S/C2), run-ins with parents (LT/C2, LT/C4), short timelines (LT/C1), curriculum and assessment reform (LT/C1, LT/C4) and lack of recognition (LT/C1). Interviews also mentioned teaching without proper facilities (T/B3) and career disappointments (LTC4, S/C1, T/A6), such as missing out on a contract renewal (T/A6) and having “hit the brick wall” (LT/C2/14). A first-year teacher described dealing with a student with behavioural issues which was initially “quite stressful, but in the end it worked out well” (T/B8/9). Interviewees outlined coping strategies which worked for them such as staying calm (T/B8, T/C2), being well-organised (LT/C1), thinking of the “big picture” (T/C2/12), and focusing on the behaviour, not the person (LT/C1). The range of these experiences further emphasises the subjectivity of stress.

**Interview question 11: What are the most common causes of stress in this school and in what ways do people deal with this stress?**

This question was asked in 36 interviews. Interviewees tended to focus on the first part of the question. The perceived common causes of stress for staff varied from school to school, and within each school, though work demands were often mentioned. A number of interviewees seemed to revert to their own experiences of stress rather than talking about staff, emphasising the individuality of stress and the difficulty in gauging stress in other people. The findings are discussed separately by school.
Causes of staff stress (school A)

There were a range of views of stress in this school. Some interviewees hadn’t seen a great deal of stress amongst staff (T/A1, T/A4), with staff seeming to be happy, enjoying work and “all coping” (T/A1/11). Workload pressures were referred to a number of times, notably administrative demands outside the classroom such as meetings, timelines and professional development (S/A1, S/A2, T/A2, T/A3): “so much to do and so little time to do it” (T/A2/8). Stress was felt to be highest at report time, which caused fatigue and reduced time for preparation (S/A1, S/A2), and when “you feel your time is being wasted” (T/A3/17). Self-imposed high expectations were also mentioned as a factor in this school (S/A2, T/A5) because teachers “prepare really, really well” (S/A1/21) and, as an enthusiastic and dedicated staff, “we’re continually striving” (T/A5/21).

Staff also commented on the effect of a few students with major behavioural problems (LT/A1, LT/A2), which meant some teachers “coming to school in knots” (LT/A1/9) or being reduced to tears, which “does affect everybody . . . that teacher’s upset and then it affects someone else that they then talk to” (LT/A1/9). Staff stress could also result from “just what’s going on in your own classroom” (T/A6/16), especially if you feel unsupported and that problems are not being addressed (T/A6, T/A7). Another interviewee mentioned well-being issues, for example, a student with inadequate shoes: “you take them home [the issues] and you think about them” (T/A1/11), “just because you care” (T/A1/11). Other causes of stress for staff were thought to be dealing with parents (T/A3), adapting to change (T/A5), and misunderstandings and miscommunication (LT/A2). A leading teacher thought staff could fix some of these problems themselves by “telling people you need help” (LT/A2/17). The acting principal thought that most stress derived from the unpredictability of “dealing with other people” (P/A/16), “that balance between what you can control, and what’s controlling you” (P/A/16). For a teacher this could come from not meeting student needs or from interactions with colleagues, while for a principal it could result from not “getting things to go as you want” (P/A/16).

Interviewees commented on life and commitments outside work as sources of stress (S/A2, T/A2), and the effect of how much people had to deal with already (T/A5): “the days that anything that goes wrong will go wrong” (S/A2/20). They described coping
processes such as emotional support, “someone to listen” (T/A2/8), and putting things back in perspective, for example, not getting stressed when the newsletter doesn’t get out on time: “who reads it anyway” (S/A2/20).

Causes of staff stress (school B)
The most widely perceived cause of stress for most staff in school B was workload pressure and demands (AP/B, LT/B, T/B/1, T/B3, T/B4, T/B5, T/B8): the “expectations of some people to do too many things” (T/B1/16); wondering “what else are we going to be hit with” (T/B3/12); “just not having enough time to get everything done” (T/B8/10). These work demands included constant meetings (T/B3), writing new curriculum (T/B3, T/B5), reporting and assessment requirements (T/B3), and dealing with parents (T/B5). The level of administrative workload took time away from helping students (LT/B) and forced staff to prioritise between competing pressures, without wanting to let the team down (T/B1). One interviewee agreed that much staff stress came from perceived unfairness of school leadership in relation to work, but thought that expectations for meeting attendance and punctuality were reasonable (T/B7).

Other work-related sources of stress were thought to come from the classroom (T/B1) and student management (T/B1, T/B2, T/B4): “just the stress of having to get up in front of kids, and the unpredictable” (AP/B/16), as well as teacher review (T/B5, T/B8), report-writing time (T/B6), teaching facilities (T/B2), “dealing with people” (S/B/9) and “being organised” (T/B6/11). A student manager mentioned stress resulting from difficult parents and referred to her own experiences, saying “it’s not rare for me to be absolutely abused on the telephone” (LT/B/9). Previously she used to go home and cry, but had now developed a coping strategy which involving understanding “you’re dealing with people’s emotions” (LT/B/10), “they’re not specifically angry at me, they just want someone to vent at” (LT/B/10).

Causes of staff stress (school C)
Perceived workload pressures were also mentioned by a number of interviewees in school C (LT/C2, LT/C4, T/C2, T/C5), such as timelines and meetings (T/C2), but the major cause of stress for many staff was thought to be adapting to change (LT/C1, P/C), particularly curriculum reform (LT/C2, LT/C3, LT/C4, T/C1). Interviewees described a section of staff who considered that their experience and teaching were “not respected”
and who resented “the imposition of things externally” (LT/C3/11). There was an “us and them situation” (LT/C1/18), not just involving administration and teachers, but also divisions within the staff as a whole, the “different empires” (LT/C1/18). Interviewees also mentioned a lack of acknowledgment from leadership (S/C1, T/C3), staff not feeling they were getting sufficient input (AP/C, T/C3), and communication problems (LT/C1). One interviewee noted “competing interests” (T/C3/10) outside work such as home and farm as a cause of stress.

MORALE
This section comprises four questions (questions 12 to 15) which cover understandings of high and low morale, the morale of school staff, personal morale, and the possibility of having high stress and high morale at the same time.

Interview question 12: Another term frequently used in organisational health and well-being is that of morale. When people talk about the levels of morale of an individual or group as being high or low, what do you think they mean by this?

This question was asked in 35 interviews. Interviewees distinguished between individual and group morale, and referred to their distinctive qualities, including job satisfaction, emotional states, social interaction and support. Definitions were similar across case studies. High and low morale are treated separately in this discussion.

High morale (individual characteristics)
One of the main characteristics of individual high morale identified by interviewees was the element of job satisfaction, of a staff member looking forward to work, wanting to come to work and enjoying work (AP/C, LT/C2, LT/C3, LT/C4, S/A2, T/B1). High morale meant “you wake up in the morning and think you do want to be here” (T/A5/23) and “find it a good place to come” (T/B6/13). It was also associated with general feelings of happiness, enjoyment and contentment (LT/B, T/B2, T/B8, T/C2, T/C3), thinking that things are going well (LT/C4, S/B, T/A6), “cruising along pretty good” (T/B8/11). It meant being “happy in your work, happy in your life” (S/C2/8). Staff members with high morale were thought to have a sense of enthusiasm, energy and motivation (S/C2, T/B3, T/C5): a “feeling like you want to give more” (T/B3/13), being prepared to go the “extra yard” (LT/A1/11) and “willing to experiment”
One administrator stipulated that staff with high morale would feel energy and contentment, but not necessarily happiness, high morale for her meant “people that are really excited about what they’re doing” (AP/B/17).

Individual high morale also meant feeling confident and positive (P/A, P/C), in control (P/A) and productive (L/TC4, P/A). Staff with high morale think they are being valued (AP/C); and believe that they have reasonable expectations placed on them (T/B2) and that they are being treated fairly and equitably (T/C2). They also tend to be more resilient as “little problems are easily coped with” (LT/A1/11). There is a social dimension to high morale, as staff enjoy coming to work not just for the job, but for the social interaction (T/A4). They appreciate and encourage people around them (T/A4, T/C3) and have an “attachment, a feeling of belonging, a feeling of acceptance” (LT/C3/11). High morale is manifested in the classroom where staff function at a high level and are experiencing success and achievement (LT/C1, S/C2, T/B5): “doing really well with their class” (T/B5/16), and getting “a buzz out of it” (T/B5/16). Students relate well to teachers and are happy at school (S/A2, T/A1).

**High morale (group characteristics)**

When referring to group characteristics of high morale, interviewees similarly identified a general feeling of happiness around the school (LT/A1, LT/A2, LT/C2), of people being “upbeat” (LT/A1/11), “a buzz about the place, good atmosphere” (LT/B/10). In a workplace with high morale there is a lot of laughter and smiling (LT/B, T/B1, T/C5), it is “friendly and engaging” (T/A3/17) and “a good place to be” (T/A5/23). A staff with high morale has a high level of energy (AP/B, T/B1, T/B7); people “bouncing around” (LT/B/10), and low negative stress (T/C5). This high morale would be particularly apparent in social environments such as the community staffroom (LT/B, T/B1), where there would be a great deal of chatter and people mixing together easily (LT/A1). Staff sit next to anyone (AP/C, T/A3) and discuss everything openly (AP/C, S/C1); there aren’t “set seats and set tables, and cliques of people who won’t talk” (T/A3/18); “everything’s happy, bubbling and everybody’s talking” (LT/C2/15).

Interviewees also identified distinct characteristics of unified social interaction in group high morale, particularly teamwork, communication and support. A key element is people getting along well and working well together as a team (LT/A2, LT/C1, LT/C4,
S/A1, S/C1, T/A2, T/B8, T/C1, T/C2), yielding a sense of group unity and well-being (S/A2). There are feelings of comradeship and collegiality (LT/C4, T/B5): people “getting along and feeling like they belong” (S/A1/21), “warm and fuzzy” (T/C1/16). A measure of high morale is the degree of team bonding (S/B, T/B3), “how friendly you feel with your workmates” (S/B/9), as distinct from individualism and isolation (T/B3). There are shared goals and a unified direction (T/C1): “a good universal sense of agreement of where things are going” (LT/C4/13). High morale is also associated with a sense of tolerance and an acceptance of divergence: “people can still get on well even though they think differently, and do things differently, as long as they can accept what the others are doing, and see everything as fair” (T/C2/13). There is an ethos of thinking beyond the individual, of doing things for other people, “that’s good morale, when you get past yourself” (LT/A2/18). Such a school is not always perfect (T/A7), but the staff can work through difficulties (T/B7), and processes are important, “it’s how things are dealt with” (T/A7/17). In a high morale staff, communication operates at a high level in all interactions (LT/B, T/B6), with people “relating well to each other” (T/B6/13) and “being honest” (LT/B/10).

Mutual support was felt to be an important ingredient in group high morale (LT/A2, T/A2, T/B4, T/C1). This meant staff encouraging and caring for one another (T/C1), assisting each other with problems (LT/C1), helping both professionally and personally, and enabling them get through a bad day (LT/A2, S/A2, T/A3, T/C1). A high morale staff know that they can always access support (LT/A2, T/A7), not only from colleagues but the school administration as well (LT/A2), as “someone knows you well enough to say: “You don’t look right, is everything okay?” (T/A7/17) This creates “a family-type environment, as opposed to just people doing their individual jobs” (S/B/9). An interviewee in one of the schools gave examples of staff getting together to fix a heater, and ringing up teachers on professional leave and wishing them luck (T/A5).

**Low morale (individual characteristics)**

Individual low morale was also defined in terms of job satisfaction, but negatively. A staff member would wake up in the morning and not want to come to work (LT/C4, S/A2, S/C, T/A3, T/A4, T/B8). They would be generally unhappy at work (P/A, T/A6, T/B8): and feel stressed by the job (LT/C4). Low morale was associated with feelings of powerlessness: “I’m the only one who’s going to do something about it, why should I
bother; this is all out of my control . . . it’s all pointless anyway. I just turn up and take my money” (LT/C3/12), “nothing ever changes” (T/C5/9). There is a lack of motivation (T/B2), a “couldn’t give a stuff attitude” (T/B4/18), and a sense of lethargy, as “you slump into a staffroom because you really can’t be bothered being there for another day” (T/C5/9). Staff with low morale feel they can’t fix problems (P/A) and are under-achieving (P/C): “standing in the one spot, sticky mud, just walking up and down, not doing much” (T/B7/10). They feel unacknowledged and undervalued (LT/C1, T/A2), and not recognised or appreciated (S/A1).

Staff with low morale believe they are being treated unreasonably (T/B2, T/C5), particularly by the school leadership (LT/C1), and not listened to or supported (LT/C3, T/A1, T/B2, T/B2) as “no-one gives you a break” (T/C5/9). The feeling of being unsupported is associated with a sense of isolation (T/B3), of being alone (T/A1) and that “no-one really cares” (T/C5/9): “you don’t have anywhere to go, or anyone to speak to” (T/A3/18). This can result in a turning inwardness and social withdrawal (T/B6), of staff not getting on with other people (T/A6) and “keeping to themselves” (LT/B/10). People avoid the staffroom and meeting with each other except when they’re compelled to (T/B/6), to the extent where “no-one knows them well enough to know that they’re not good” (T/A7/17), and “that person can just sort of be almost like a ghost” (T/A7/17). Social withdrawal is manifested in increased absenteeism as staff take sick days (S/A2, S/C2, T/B4), not bothering to turn up for work (T/C3). The tendency towards individualism is evidenced by people not working with others or feeling part of a team (LT/C1, T/B7, T/B8, T/C1, T/C2, T/C3), not caring if they impact upon other staff (T/C3), not tolerating their opinions (T/B7) and “blocking things” (T/B7/10).

Low morale teachers were thought by many interviewees to have more trouble in class (LT/C1, S/C2, T/A5, T/B5, T/C5), “your classroom’s a rut, and you don’t want to be in it” (T/A5/24). These staff blame others for their problems (LT/C1): “you really don’t want to have that Year 8 class again because you’ve complained about them and no-one’s helped you” (T/C5/9). One interviewee commented on symptoms of low morale in her own school, with teachers not collecting new textbooks and teaching poorly: “they’re not on the ball” (T/B5/16); “the way they’re moving around, their body language tells me” (T/B5/16). Though low morale was widely associated with reduced quality teaching, some interviewees took the viewpoint that unhappy students were
often the “last indication” (S/A2/21) of low morale, especially if the low morale originated outside the classroom. One interviewee observed that at his previous school some staff “had an engagement with their classes and a concern about their classes and liked their classes, but they had a feeling about the school as an entity that was not positive” (LT/C3/12). Some interviewees thought the nature of low morale varied according to its primary cause (S/A2, T/B2), depending on whether it derived from difficult students, relationships between colleagues, or conflict between staff and leadership or staff and the government (LT/C4, P/C).

**Low morale (group characteristics)**

Interviewees described a staff with widespread low morale as having low energy (T/B1), “like people are a bit ground down” (T/B1/18). They thought a low morale school was characterised by poor communication (LT/A2, LT/B, LT/C1), particularly between staff and leadership (S/A2), but also between individual staff (T/B4). Strongly-held points of view are often not openly expressed or differences resolved (AP/C), as “communication takes place via the grapevine” (T/B1/18). People with perceived grievances regularly retreat into small groups to engage in negative talk (LT/C2 LT/C3, T/B1, T/C2) and express dissatisfaction (T/A3, T/C5) by constantly complaining (LT/C3, T/B1). In a low morale environment there is a lack of social cohesion and unity, with arguments between staff often evident (T/B4). There is a tendency for people to talk about others behind their backs (T/B4), putting up notes or making “snide comments” (LT/C3/12), “an outsider mentality emerging” (LT/C3/12). There is an absence of co-operation (LT/A1) and “mistrust of other people’s motives” (LT/C3/12), meaning “little things can become big things” (LT/A1/11), as minor irritations feed on a general sense of dissatisfaction and distrust.

Staff in a low morale school tend to work in a more restricted way, arriving late and leaving early (T/A5): “people aren’t prepared to put in one ounce of extra work” (T/A5/24); “you’re more inclined to say ‘no’ if you’re asked to do extra things” (LT/A1/11). It was thought low morale could easily spread within a group: “it can just take just one staff member coming in and starting each day with ‘oh, another day at this place, why am I here?’ ” (T/A2/9) Such a statement “just pulls you down” (T/A2/9). Interviewees described ways of maintaining morale, even if workload and stress are high, such as volunteering to take extra classes to cover an absent teacher (LT/2), and
having regular social functions, so people are “not feeling isolated” (S/B/10). Staff also needed to “support each other” (LT/2/19), for example, by simply asking: “hey, how’re you going, what’s wrong?” (S/B/10)

**Interview question 13: How would you describe morale amongst the staff in this school? (Please explain)**

This question was asked in 36 interviews. The descriptive terms used by interviewees in estimating staff morale have been grouped into four general categories for ease of reference, for example, “90% high” (categorised as high), “average to high” (above average), “middle” (average) and “fairly low” (below average). The results are summarised in Table 7.

<table>
<thead>
<tr>
<th>Morale category</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>11</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Above average</td>
<td>2</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Average</td>
<td>-</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Below average</td>
<td>-</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

This table shows that reported staff morale differed significantly between the three schools, being clearly higher in school A (the primary school) than in schools B and C (secondary and P-12 schools). It also shows more consistency in ratings within school A than the other two schools. Most interviewees added comments to explain their morale ratings, with a number (especially in schools B and C) qualifying their assessments by indicating that morale varied both over time, and within each school staff as a whole.

*Staff morale (school A)*

Most interviewees in school A thought the staff had high morale. The school was described as “a good place to be” (T/A6/17) with “a good, fun staff” (LT/A1/11) who “want to be here” (T/A2/9). The staff had a strong sense of teamwork and camaraderie (S/A2, T/A2): “we can work together, yeah, and just really bounce off one another” (T/A1/12); there might be “a couple of holes in the wall, but that’s alright, the rest of the wall’s pretty strong” (LT/2/21). Support was felt to be an important part of staff identity
(P/A, T/A1, T/A2) and communication thought to be open and well developed, with an absence of unhelpful “negative talk” (T/A3/18). All staff and administration were approachable (T/A1, T/A6) and the leadership not “totally separate from the rest of us” (T/A6/18). Some groups might be closer than others but “I feel I get along well with anyone” (T/A7/18). The high level of morale was particularly apparent in the staffroom where there was a sense of togetherness (T/A6), staff mixing and interacting well (LT/A1, T/A6), people sitting anywhere (LT/A1, T/A7), and “a lot of chatter” (LT/A1/11). This was contrasted with a low morale staff where “you’d walk into the staffroom, no-one would really be in there, they’d kind of stay in their own rooms” (T/A6/17).

Interviewees felt that the staff adapted well to challenges (T/A5, P/A) and maintained a shared purpose: “everyone has to be heading in the same direction” (T/A5/25) and “have the same idea about what’s important” (T/A5/25). Cohesiveness in the staff was enhanced by “a few key people” (S/A1/22), who brought the wide range of ages and personalities together (S/A1, T/A6), and by staff getting on well informally through having regular social functions (LT/A1, T/A6). Keeping up morale was felt to be not only an important leadership function but the responsibility of all staff (S/A1), and something that “had to be worked on” (T/A6/18). The acting principal thought that when faced with a major challenge, the most important thing was to take some form of action (P/A). Such a step might not necessarily solve the problem but keeps people positive, otherwise “you’re almost basically saying that you’re beaten” (P/A/19). He recalled how a period of slightly lower staff morale at the school had ended “as soon as we actually started to do something . . . because they felt like they had some control back” (P/A/18).

Staff morale (school B)

In this school, in contrast to school A, interviewees thought morale was generally around average, some rating it slightly higher and others lower. A number of interviewees thought staff were stressed and pressed for time through overwork (T/B2, T/B3), especially deriving from demands such as meetings and curriculum reform (T/B2, T/B3, T/B8). There wasn’t the buzz of high morale (T/B1): “what you see is a half-empty staffroom because people are still doing other things” (T/B1/17), and “a few people who are sort of fairly tired and over it” (T/B1/17). Staff were described as a “a
little bit flat” (T/B3/14), there was no “punching the air” (T/B3/14). Reduced morale was evidenced in a greater reluctance to attend functions and meetings, and more negativity, “the whole team thing” (T/B7/11). On the other hand, some interviewees commented that they enjoyed working with the staff group (T/B4, T/B6), they felt it was generally supportive and had “a sense of togetherness” (T/B4/17). The assistant principal thought morale was high but people were not necessarily happy, that there was a “high level of energy” (AP/B/18) but also a “high whinge level” (AP/B/17). The principal thought morale was about 65%, but could vary from really low to 95%. He felt morale was generally improving, with new staff coming into the school and more pride being shown, though he noted there were perceived workload issues amongst some staff (P/B).

Staff morale (school C)
Estimations of morale in this school varied from above to below average, as in school B. Staff comments were distinguished by observations on variations in morale between groups of staff, particularly primary and secondary, and on a perceived discrepancy between what some staff observed and the low morale indicated in SOS data.

A number of interviewees thought that many staff were quite satisfied and happy, and morale fairly high (AP/C, LT/C1, LT/C2, T/C5). They felt there was a sense of togetherness amongst staff (LT/C2) and no real negativity (T/C5): “the people I work with are pretty motivated” (T/C5/9). However, they also commented that some people can “get pretty down” (AP/C/15) over an issue and tend to “bottle it up or keep it in a little group and let it fester” (AP/C/15). Though some “backbiters” (LT/C/1/20) had retired, there were still disaffected older staff (LT/C1, LT/C2) who were “burned off” (LT/C2/16). Interviewees who described morale as lower (LT/C1, LT/C4, S/C1) noted that some experienced staff had lost their enthusiasm and felt undervalued (S/C1). There were “different pockets” (LT/C4/13) of staff who were dissatisfied with the school administration and the system as a whole, having had “a gutful of change” (LT/C4/13). One interviewee thought morale was higher when most staff lived locally and the school had a community focus (LT/C4). The principal thought morale was “all over the place” (P/C/14), some staff having high morale, others low and perhaps depressed (P/C).
Some interviewees, who thought morale was variable but generally acceptable, commented specifically on the discrepancy between their views and SOS data, which showed abnormally low morale in the school (LT/C3, P/C, T/C4). The principal commented: “I didn’t think it’d be sort of bouncing round really high but . . . I wouldn’t have thought it’d dropped” (P/C/21). A staff member new to the school thought the staff “don’t know when you’re well off” (LT/C3/12). He found people were generally positive and there was a “sense of real pride” (LT/3/13) in the school, with “groups of people who want to be involved and who want to do things” (LT/3/13), though a few staff seemed to have “change fatigue” (LT/C3/14). He thought that the general feeling in the school contrasted with the “sniping and constant putting down of others” (LT/C3/13) of a low morale staff, such as in the school from which he had come. A long-time teacher in the school also could not understand the “absolutely woeful” (T/C4/11) SOS data. Despite a few older, dissatisfied teachers, most people seemed happy at work and he felt there was less unrest than in previous years. He attributed the SOS results to more positively-oriented people not completing the survey or “external stressors” (T/C4/12), such as dissatisfaction with pay or promotion.

Variations in morale

Many interviewees in all three case studies, including school leaders, commented on variations in morale over time and between individuals. Particularly in school B, morale was thought to be higher at the start of the year when people were fresher and happier (LT/B) and teams started off with enthusiasm (T/B1), and at the end of the year (T/B4) with “light at the end of the tunnel” (LT/B). The middle of the year, during report-writing time (when the interviews were conducted), was particularly busy and “incredibly stressful” (T/B2/21), with morale lower (LT/B, T/B1, T/B2, T/B3, T/B4, T/B8) as “the energy starts to dissipate” (T/B1/18). During this time there were more tired staff, with people not stopping to talk (LT/B), and “walking around with their head down” (LT/B/11), “not a good time to ask me” (T/B3/14). Although some interviewees in other schools reported slightly lower morale in the middle of the year (S/A2, T/A4), the effects seemed less significant (LT/C2, T/C1, T/C5) than in school B. There was a slight drop in morale in school A when a principal went on leave (P/A). Morale couldn’t stay high all the time, “everywhere has little dips” (T/A3/18).
Individual morale also varied within a school staff, as a staff member had an issue which affected them for a period, then, once they “realise that other teachers are there to support them . . . they’ll lift up again” (P/A/19). One interviewee in school B noted that the people she worked with were “pretty positive” (T/B/8), but others complained a lot about work pressures. Even though most people were coping, some staff were “struggling” (T/B5/17), having “fallen by the wayside” (T/B4/18). Differences in morale within school C were investigated further in the following interview question.

Interview question 13: Are there differences between primary and secondary staff?

Twelve staff in school C were asked about differences in morale between primary (prep to Year 6) and secondary (Years 7 to 12) sectors. Apart from one interviewee who felt he was too new to the school to comment (LT/C3), all interviewees, both primary- and secondary-based, agreed that morale was generally high and uniform amongst primary staff, and markedly lower and more variable amongst secondary staff (AP/C, LT/C2, S/C2, T/C1, T/C2, T/C3). Interviewees described the smaller primary staff as working better as a team (T/C1, T/C3), meeting and discussing things regularly, and communicating well (T/C3). The secondary staff were less cohesive, having “different responsibilities and expectations” (T/C3/12), and some older staff who were jaded (LT/C2, T/C3). A staff member who taught in both sectors thought primary staff were more creative (T/C5): “they’re cool, they just love doing different things” (TC5/10), while some secondary staff had more an attitude, “oh, it’ll do” (T/C5/10). Primary staff seemed to pick up on curriculum reform more quickly, while secondary staff found it “threatening” (AP/C/15), and were “scared of change” (T/C3/12). Primary staff were more open and direct (AP/C), tended to talk out problems (T/C2) and were less inclined to complain (AP/C), while secondary staff dwelt on issues such as unhappiness about teaching allotments (LT/C1, LT/C4). Some interviewees attributed these differences to personality (LT/C1, T/C1, T/C3), suggesting primary teachers are “a different breed” (T/C1/16), that through having to deal with the neediness and “lack of independence” (T/C3/12) of younger students, they tended to be more enthusiastic, caring, flexible and supportive (P/C, T/C1, T/C3). They were “naturally more collaborative” (P/C/14): “yep, okay, bring the kids in here, I’ll do that” (T/C1/17). On the other hand, secondary staff
were thought to be “less nurtured and more focused” (LT/C1/20), more individualistic, less inclined to teamwork, and offered each other less support (P/C).

**Interview question 14: What about your own morale? Does it match that of the staff?**

This question was asked in 34 interviews. Ratings of individual morale have been grouped into four general categories for ease of reference, with descriptors such as “very good” (categorised as high), “fairly good” (above average), “middle” (average) and “low” (below average). The results are summarised in Table 8.

<table>
<thead>
<tr>
<th>Morale category</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>8</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Above average</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Average</td>
<td>-</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Below average</td>
<td>-</td>
<td>-</td>
<td>1</td>
</tr>
</tbody>
</table>

Most staff rated their morale as good or above, and only one interviewee reported morale as low (“easily the lowest” [LT/C4/15] in his teaching career). A comparison between Tables 7 and 8 (ratings of staff morale and individual morale) shows that individual morale was rated slightly lower than staff morale in school A but higher than staff morale in schools B and C.

A number of staff indicated that their own morale varied over time. For some interviewees morale had improved over the past few months or year (S/C1, T/A7, T/B1, T/B5), while for others it had declined (T/A3, T/B3, T/C3) or was just variable, sometimes high, sometimes low (AP/C, LT/B, P/A, P/C, T/A6). Morale could even vary daily. For one student manager under high workload pressure, some days were “fantastic” (LT/B/12) while other days she felt “absolutely exhausted” (LT/B/13). Interviewees gave a range of reasons for changes in morale, with downward factors including work-related issues such as problems with classroom teaching (T/A6, T/B1, T/C1), negative colleagues or staff conflict (AP/C, T/C3), report-writing (T/B3), parent complaint (P/C), and general work stress (T/A6). There were also external agents such
as sickness (S/A2), demands of a new baby (T/A3), children with exams (S/A2), and
general home pressures (T/C3). Upward factors were mainly work-related, including
support from other people (LT/A1, LT/B, T/A7), being close to retirement (S/C1,
T/C2), reducing a time fraction (T/B1), being in a new school (LT/C3) and organising a
major event at work (S/C2).

Interviewees described personal characteristics which helped to maintain their morale,
such as being able to work in well with other people (T/A1), thinking positively and
avoiding negative talk (T/B2), feeling in control (P/C), and reframing problems: “I had
to put that in my head in a different way” (P/C/15). Some staff with high morale
commented on how much they enjoyed their work and liked the school (AP/B, S/A1,
T/A2, T/C5): “I’ve had enough experiences to know that it’s a good place to be”
(T/A2/10); “I wouldn’t go anywhere else” (AP/B/18). One interviewee highlighted the
relationship between individual and group morale, commenting that when she had low
morale she wasn’t contributing to the team (T/A7). She felt that group morale was more
stable, if one person was down, the group “can pull it together pretty quick” (T/A7/21).
Only one interviewee directly compared her morale to the staff in general, saying she
was more positive (T/B2).

**Interview question 15: Do you think it is possible to have high stress and high
morale at the same time? (Please explain)**

This question was asked in 34 interviews. The results have been grouped into three
general categories and are summarised in Table 9. The category “unsure” included
responses such as “don’t know” and “possibly”.

**Table 9**

<table>
<thead>
<tr>
<th>Response</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>10</td>
<td>5</td>
<td>8</td>
<td>23</td>
</tr>
<tr>
<td>No</td>
<td>-</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Unsure</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>7</td>
</tr>
</tbody>
</table>
Most interviewees thought you could have high stress and high morale at the same time, although many qualified their answers in some way. Those who answered in the affirmative explained that stress was part of the job (T/A4), and that “you need stress” (AP/B/18). They felt some people worked effectively under stress (T/A4), so a staff member could be stressed at times but still enjoying work (T/A2, T/C2). Busy times with a great deal going on (LT/A1, T/A5) and a lot to do (S/C1, S/C2, LT/C1, LT/C3) meant positive stress, achieving things and feeling appreciated (LT/C3, S/C2), while pressure situations could be managed by working hard (LT/C1). It was commented that staff could remain positive and cope better if they were supported (S/A1, S/B, T/B8, T/C2), liked what they were doing and “felt accepted” (S/B/11). Stress might come from external factors and not affect morale at work (T/A5, T/B8, T/C2): “I’m pretty stressed, but it’s not necessarily about school stuff” (T/C2/14).

In qualifying their answers, some interviewees explained morale would drop if high stress extended for more than a short period (S/A2, T/A3) or was not being dealt with (LT/B). Morale would only stay high “if you can see an end to the stress and that you can cope with it” (T/B6/16), otherwise “it would eat at you very quickly” (S/A2/23). Initially, stress can be exciting because of being busy and the sense of achievement, the “adrenalin rush” (LT/B/14) but then “you just get so overwhelmed that you explode” (LT/B/14). Interviewees suggested that high stress could be better managed if you had high morale, if not, “then one or two things and it could tip you over the edge” (LT/A1/14). Some individuals were more resilient and thrived on challenge, but “not across the board” (LT/C4/16), so high stress across a group would lower morale in those who weren’t coping (LT/C4). Another interviewee distinguished between stress and pressure which “doesn’t bring me down” (T/A7/19): “I can be pretty on the go non-stop, but it’s the way that I work” (T/A7/19).

Those interviewees who were sceptical about high stress and high morale occurring together gave a series of reasons. They explained that stress could only be endured for a short time when trying to achieve a goal under pressure (T/B1), otherwise “the stress will dampen the morale” (T/B1/19), and that high stress and high morale were possible ideally, but not in a school context with heavy work expectations (T/B2). One interviewee thought it depended on the nature of the stress, that some teaching can be stressful but give you a high (LT/C2), and another that high morale might carry you
through busy, but not stressful times (T/B4). It was also suggested that morale goes
down as stress increases (AP/C, T/A1, T/B3), it was a “balancing act” (AP/C/16). Some
interviewees observed that though some people might be able to cope with high stress
for long periods, most would not (T/C1), or they could not personally (LT/A2, T/A6,
T/B4, T/C1), being too self-focused and not able to look after the needs of others
(LT/A2) or too anxious: “you’re too knotted up in the guts” (T/B4/19). Morale could
not be maintained with high negative stress (T/B4, T/B7, T/C3) because “everyone’d
just give up” (T/B4/20) or not “unless you’re a really good actor” (T/B7/11).

Stress in these responses was generally constructed as an individual characteristic, and
morale as either an individual or a group characteristic. Some interviewees seemed to
imply a distinction between stress resulting from temporary pressures and having a
positive impact (eustress), shown in physiological arousal, but not accompanied by a
negative emotional state or reduced functioning, and more extended, ongoing pressures,
impacting negatively on behaviour (distress). Most interviewees suggested some sort of
inverse correlation between negative stress and morale. There seemed to be a temporal
distinction, with morale perceived to be a more stable, enduring state than stress. The
answers emphasised the subjectivity of stress, with individuals felt to have varying
degrees of resilience.

STAFF OPINION SURVEY
This section comprises questions 16 to 22. It covers response to the SOS, information
provided about the SOS before and after it was undertaken, perceptions of the SOS,
understandings of items in the SOS, and consistency of SOS response.

Interview Question 16: Can you tell me if you completed the most recent Staff
Opinion Survey? (It required you to log into a website). If not, would you mind
telling me why not?

This part of the question was asked in 36 interviews. All except two interviewees had
done the last SOS. Reasons for not doing the SOS were having forgotten to do it (P/C)
and having other priorities (T/C4). The latter interviewee explained that this was the
first year he had not done it, but that he did not rate the SOS highly, feeling he could
spend his time more valuably, for example, playing football at lunchtime with kids who
were always getting into trouble (T/C4). He thought he would have been fairly positive with his responses, and believed that people who wished to make it known that they were unhappy were more likely to do the SOS than “people who are reasonably happy with their lot” (T/C4/12). Interviewees made other comments such as not liking computers (T/C2) or surveys (T/B/3), and not remembering what they put down (T/C5). One interviewee, who had done the SOS for the first time, observed that at her previous school, it wasn’t a priority and “wasn’t pushed as much” (LT/B/15).

**Interview question 16: Can you tell me what information you received about the Survey beforehand? What information were you given about the results afterwards?**

**Prior information**
The part of the question relating to prior awareness of the SOS was asked in 19 interviews. Interviewees in all three schools felt there had been sufficient information given out about the SOS and that they were encouraged to do it. Findings are discussed by school.

In school A the SOS seemed to have been given more prominence in recent years and had greater importance for principals (LT/A1, LT/A2, T/A7), with staff being well prepared for it (LT/A2). They were told to think seriously about their responses (LT/A1), and to consider the ways in which the results may have been used to reflect on schools and to judge principals (LT/A1, T/A7). Staff were advised to think “more long-term generally, rather than spontaneously” (LT/A1/16), to make sure they weren’t influenced by a bad day (LT/A1, T/A4, T/A7) or to use the SOS to “lash out” (T/A7/21). Some interviewees (LT/A1, LT/A2, T/A5) remarked negatively on a comment by the principal that they should do the SOS at home and have a glass of wine beforehand, in order to “be in a relaxed mood” (T/A5/32) when doing it. They were concerned that their responses were being manipulated (LT/A1, LT/A2): “it can look like you’re trying to direct people’s answers” (LT/A1/17); “I don’t like being told how to respond” (LT/A2/27).

Interviewees in school B were also fully informed about the SOS, knowing when and how it was available well in advance (AP/B, T/B1, T/B2). It was mentioned at briefings
and staff meetings (T/B7, T/B8), and the percentage of staff completion given out before the closing date (T/B7). Staff were advised to be truthful when undertaking the SOS, so that the results accurately reflected staff opinion (T/B6, T/B8), and to watch for areas of question wording “where you could be tripped up” (T/B2/24). The assistant principal explained that staff were counselled about “the need to make on-balance decisions, the need to think it through and to work out what each category means” (AP/B/18). Interviewees in school C were told by email about the SOS and how to complete it (LT/C4, S/C2, T/C1, T/C5). It was mentioned at staff meeting as part of staff feedback from the previous year (AP/C) and staff were given reminders about it (P/C). Staff were encouraged to do the SOS and told there was no “school-preferred answer” (LT/C1/25).

Discussion of results
This part of the question was asked in 21 interviews. Answers referred to the previous year’s results; in school C, the current year’s results were released late in the interview period but hadn’t been discussed with staff. The dissemination of SOS data varied from school to school. In schools A and C the results were discussed with staff in some detail, while in school B, less information was provided. Findings are given by school.

In school A the principal took the staff through each part of the results in some detail during a professional development day, indicating their results were above the rest of the State (S/A1, T/A6). A member of the leadership team commented that they always “sit down and have a look at it” (T/A2/13), and that the results had always been excellent. The results were less widely discussed in school B (T/B1, T/B3). They were looked at by leadership team but feedback to staff was restricted (T/B2, T/B7), except for a general comment at staff meeting (T/B5, T/B6) that the results had been “more positive” (T/B5/18) than in previous years. There was more discussion of the student survey (T/B3, T/B5). Some interviewees expressed frustration at the lack of debate. Interviewees thought the results probably showed low morale due to workload pressures (T/B1, T/B2, T/B5), but staff were “shielded from the inevitable conclusions” (T/B2/26) and there had been no discussion of what could be done about it (T/B1). The SOS was felt to be a “closed area” (T/B5/19), with no opportunity for staff input. It was part of the “jigsaw” (T/B1/21) which had not been addressed and should have been (T/B1, T/B5). Interviewees questioned the point in doing the SOS when staff didn’t find out
their responses or what action had been taken (T/B2, T/B5). The assistant principal argued that SOS results had not been given to staff because, by the time they were released, changes had already been made in the school, and “we need to move forward rather than reflect backwards” (AP/B/19).

In school C the “fairly alarming” (T/C1/18) results were discussed extensively by leadership team, weaker areas such as communication identified, then the SOS data taken to staff meeting to discuss possible action (LT/C1, LT/C2). Staff were put into small groups and encouraged to express their opinions openly (LT/C2, T/C1) about how they wanted issues addressed (T/C1): “if you’ve got any problems or concerns, spill them out, get them off your chest” (LT/C2/18). Staff found this confronting but valuable, depending on the honesty of the group (T/C1). One interviewee thought the principal had been more responsive since the last SOS (T/C3), while another interviewee had been surprised at the poor results (T/C5).

**Interview question 17:** If you completed surveys when they were paper-based (2003 and before), do you remember how they were administered? Is the web-based version preferable?

This question was only asked in school A (11 interviews), as the answers were consistent and did not add to understanding of the current SOS. Interviewees described how the principal distributed the SOS in paper form prior to 2004. They were given out at a staff meeting and returned to a box in the office (LT/A1), in “a plain envelope so she didn’t know . . . whose was who” (T/A4/16). Staff felt care was taken to ensure the process was as confidential and anonymous as possible (LT/A1, LT/A2, T/A5, T/A7). One interviewee reported spending little time on it, doing it at the end of staff meeting, and thinking “let’s get it done, let’s do it quickly” (T/A2/10). Staff reported that at other schools principals had expected people to do them at staff meetings (S/A1, T/A4), explaining “we’re going to do it right now” (S/A1/24), but people didn’t mind, they “didn’t place much importance on it” (S/A1/24). All interviewees agreed that the online version was preferable as they were comfortable with the technology (LT/A1, S/A1, S/A2, T/A2, T/A6): “I’m confident in that medium” (T/A2/10), “a good way to do it” (T/A6/19). The SOS was felt to be easy to complete (T/A3, T/A4), given good Internet access (T/A5), and had the advantage of assuring confidentiality and anonymity (T/A3).
Interview question 17: Did you find doing the survey a positive experience?

Interview question 18: Do you think staff opinion surveys of this type are a good way of finding out about teacher and school well-being? What things would you change about them?

Answers to these related questions are discussed together. Responses to both questions mentioned points in favour of the SOS, reservations about the SOS, and discussed alternatives. The first question was asked in 16 interviews, with four interviewees finding doing the SOS to be a generally positive experience, three finding it generally not positive, and the remainder having mixed opinions. The second question was asked in 24 interviews. Nine interviewees generally thought the SOS was a good way of finding out about well-being, nine thought it was not a good way, and the remainder had mixed opinions. Answers from both staff and administrators tended to mention both supportive comments as well as criticisms, but points made against the SOS were given in much more detail.

Supportive comments

A common argument in favour of the SOS was that it protected anonymity and confidentiality, which meant that staff who didn’t express their real opinions in other forums could make school leadership aware of them (LT/C2, S/C2, T/A3, T/A6). They could be open with their views (LT/B1, T/A1), “be brutally honest” (S/C2/13), feel they “can respond truthfully” (T/A6/20). It was felt that the SOS gave interviewees an opportunity to comment (T/B1), a chance to “vent” (T/A2/13) and “voice any concerns” (T/A1/17), especially in environments where they did not otherwise have the opportunity (T/A2). In school B, where it was felt constructive criticism had “been actively stamped upon” (T/B1/22) and dissatisfaction took place “via the grapevine” (T/B1/22), the SOS was seen as the only avenue for staff to make their views known formally (T/B1). The SOS was also thought to be easy for staff to undertake and a good thing to do (T/B6); it was an important right of staff (LT/C1, LT/C4).

The SOS made people think about the school as a workplace (AP/B, LT/B, LT/C1, T/C2, T/C5), such as the amount of time spent on discipline (AP/B) and the level of school morale (T/A1). It was seen by some interviewees as the best method of
investigating organisational health available (P/A, P/C, S/B, T/A3), giving everyone the same “blank canvas” (T/A3/21) on which to respond. The SOS was a “check and measure” (T/A3/21), a useful benchmark, which showed state-wide, general patterns (LT/A1) and gave another insight or picture. A leading teacher observed that SOS results had picked up communication issues and concerns about leadership in his school which needed to be investigated further (LT/C1). A principal thought the SOS highlighted areas for improvement in making the school a “supportive environment” (P/B/9) which the leadership team could analyse and use to refine practice (P/B). As the only measure of staff organisational health available, he looked at SOS results closely, examining what the school had done, and what practices could be changed (P/B).

Reservations

The main reservation interviewees had about the SOS was that individual judgements of well-being reflected in SOS responses varied over time and were a product of immediate experiences and feelings (LT/A2, LT/B, LT/C3, T/A2, T/A3, T/A4, T/A5, T/B7, T/C2, T/C3, T/C5): “you tend to think of recent events when you’re doing it” (T/A5/32). They questioned its value as an “accurate long-term instrument” (T/C3/14): “people can feel different things on different days” (T/B7/12); “it depends what happened the previous day” (LT/C3/15), and even “within the day” (T/C2/15). There were “times that you’re really, really happy” (S/A2/24) and others “when you think, ‘oh, gee, I hate doing this’ ” (S/A2/24). Negative events were thought to have a particular impact on attitudes to the SOS: “if I sat down and did it on a day when I just had a run-in with the principal, or a terrible class” (LT/B/16); “if you’ve had a bad morning that day, well, there goes your survey” (T/C5/15). These negative events might be unrelated to work; it could be just “how I was particularly feeling at that time” (LT/A2/25). It would be easy to “have a bad day and go home, and throw some dots in” (T/A4/17). Timing of the SOS during busy times, such as during report-writing, could also generally affect responses negatively (T/B6). A principal thought SOS responses were probably based on the “previous forty-eight hours” (P/B/9), though he himself tried to reflect on the whole year (P/B). He thought that morale was lower at report-writing time whereas “at another time when we’re flying, then it would just go through the roof” (P/B/9).
Another area of concern which interviewees had about the SOS related to their belief that responses would tend to be generalised, that feeling strongly about one issue in the school would be likely to affect answers to all items (AP/C, LT/C3, P/C): they “don’t actually consider each one separately” (AP/C/20); particularly unhappy staff who were more likely “to be strong on the negative side” (P/C/17) and would spend less time on their responses (T/A4, T/B6). It was felt that the anonymity of the SOS was a particular problem (AP/C, LT/A1, LT/C2, T/C5), making it easy for some staff to be negative, which then created problems in interpreting the data (AP/C, LT/A1). Interviewees questioned the motivation and honesty of some staff (LT/A1, T/A2, T/A4, T/C2): “you can say what you want to say, you don’t have to say the truth” (T/A2/12), particularly the people who “just decide they’re going to mess up the works a bit” (LT/A1/17). One interviewee thought that those “with an axe to grind will go in boots and all” (LT/C2/18), taking an opportunity to have a “free kick” (LT/C2/18) at the principal. Another interviewee knew staff from his previous school who told him “that they really wanted to fill it in this year because they wanted to have a slap at the administration” (LT/C3/15).

There were a number of criticisms of the format of the SOS, particularly its length (T/A2, T/A4, T/B8, T/C3) and repetitiveness (LT/C4, T/A5, T/A6, T/B5, T/B8, T/C1, T/C3, T/C5), which meant interviewees probably gave less thought to later questions (T/A4). The repetitiveness was associated with similar questions being reworded in a different way: “different forms of the same question being asked again and again” (T/B8/13), which made some respondents feel as if they were being “tricked” (T/B4, T/B5): “like they were trying to catch you out on things” (T/C3/14). A further perceived problem with format related to the restriction of the closed response categories (LT/B, T/A2, T/A5): “you have no chance to say yes, but why” (T/A2/12); “you might agree with something but you certainly might have more to add” (LT/B/16); “how far along a scale . . . that’s very hard to determine” (T/A5/32). The format also prevented respondents explaining that their response was meant as “a need for improvement” (LT/A2/27), rather than a negative. Some interviewees thought that the scope of the SOS was necessarily limited: “there’s not a series of questions that can really reflect a true experience” (T/B5/21); it was only a snapshot in time, “quantifying qualitative data” (LT/C3/16). Other reservations about the format concerned negatively-worded questions, which were thought to be confusing (T/A5, T/C2), and the SOS not asking...
about positive experiences and therefore “almost garnering a negative response” (P/C/17): “you think of things that aren’t right” (LT/C4/17).

Interviewees commented on problems with interpretation, such as having to lump people together (AP/C, T/A2, T/B2), not being able to distinguish between members of a team “if there’s a problem with one person” (T/A2/12), and having a different mindset to that assumed by the question (T/A2). Some interviewees found questions about staff behaviour difficult to answer (AP/B, S/C2). They felt that judgements about “how other staff are feeling” (S/C2/12) could only be made from “the table they sit with” (AP/B/20) and from people who are vocal (AP/B). Some interviewees felt they weren’t qualified to comment on some areas, such as SSOs in relation to questions about the principal and teaching staff (S/C2), and first-year teachers on areas with which they had insufficient experience (T/A6, T/B8, T/C5). They felt they had to answer anyway (T/C5) and tended to mark these questions mid-range (S/C2, T/B8). Administrators found it difficult to answer questions relating to their own areas of responsibility (AP/B, LT/C2) and observed that they tended to tick extremes (AP/B). One interviewee commented that external factors meant his responses to the last SOS would have indicated low morale, but “it’s not asked whether the school’s caused that or not, it just asked how I felt” (LT/C4/17).

The SOS was not felt to be a good form of communication by a number of interviewees, particularly by staff in school C (AP/C, LT/A2, LT/C2, P/C, S/C1), who believed it should require more input than just to “tick a little thing on a screen” (AP/C/19). It was not transparent because it did not encourage staff to be “open and honest” (AP/C/19) and had the potential to result in “a culture of mistrust” (AP/C/19). Individual schools should have a relationship with teachers where they felt comfortable to discuss issues and ask for help (AP/C, LT/A1): “I don’t want to hear it via a survey; I don’t want to hear it on the grapevine” (AP/C/20). There should be a joint responsibility for fixing problems (LT/C2): “you should be able to meet, discuss it, air your feelings, and try and fix it and move on” (S/C1/17). This would compel people “festering a gripe” (AP/C/20) to take ownership of the problem, rather than being able to “just sit back and throw bombs in” (AP/C/20), behaviour which lowered morale of those staff who worked hard and of the leadership team who could not see a positive outcome (AP/C).
Insufficient feedback about SOS results and lack of action by leadership were also mentioned, particularly in school B (S/C1, T/B1, T/B2, T/B3, T/B5, T/C1): “I just never seem to see any outcome of it” (T/B1/20); “I just find it doesn’t matter, doesn’t have any impact” (S/C1/17); “what actually changes?” (T/B5/20) This then fed back to survey approach: “I’d probably take a bit more care . . . if it’s going to be recognised and listened to” (T/B3/19). For an administrator, the results were valueless unless they indicated a course of action and were accompanied by the necessary resources and support: “it’s what I do with it that’s more important than being told it” (P/A/21). It was also thought that to use the SOS as a performance indicator for schools and school leaders, rather than “the reasons it should be done” (P/A/22), was unfair to principals, knowing that being “an under-performing school” (P/B/9) might mean a government review. One principal expressed her misgivings about the SOS as a whole, referring to other principals with a strong educational direction whose schools were widely perceived to be “travelling really well” (P/C/21), but whose results were lower than expected, “because they keep people uncomfortable” (P/C/21).

Alternatives

A number of interviewees mentioned changes or alternatives to the SOS as a measure of organisational health in their initial answers. A follow-up question asking about whether there were better ways of finding out about staff well-being was also asked in a further 16 interviews. A few interviewees could not think of a better alternative to the SOS (S/C2, T/B3, T/B4), “as long as you can speak honestly” (TB3/17), and “if it’s going to be recognised and listened to” (TB3/17), but most suggested changes to the SOS or using other methods of assessing organisational health.

Interviewees suggested redesigning the format (AP/B, LT/C4) by changing the focus of some questions to “keep asking you about you, and not about staff” (AP/B), and making it shorter by removing “trick questions” (T/B5). It was also suggested the SOS should include wider reference to curriculum, reporting and government policies (P/C). The SOS would be “fairer” (T/B/21) if it asked about specific positive and negative experiences for the week, meaning people will probably tick both, rather than the current format where teachers tended to “tick the worst things” (T/B5/21).
Some interviewees thought that alternatives or supplements to the SOS were needed: “I wouldn’t like to think that it’s the only indication of how a school is going” (T/A3/21). These mainly involved more open and honest communication: “you need to talk to people” (LT/A2/27); “there’s greater value in talking about their actual work” (P/C/17); “I’d rather read a person by talking to them” (S/A1/24). Most of the alternatives to the SOS which were suggested involved focus or discussion groups (LT/B, T/B7, T/C2, T/C3, T/C5), or interviews (LT/A1, LT/B, LT/C4, T/B1, T/B8, T/C5). It was felt having discussion groups might enable staff to realise they had experiences in common and come up with solutions to problems (T/C5): “I don’t think it does any harm for people to talk to other people . . . and to discuss openly” (T/C2).

Interviews could take the form of the research method, “coming into the schools and actually talking to people” (T/B8/14). Staff thought that “sitting down and talking like this” (LT/B/16) was a good way of investigating organisational health: “a one-on-one chat like this over a cup of coffee” (LT/A1/17), “like you’re doing with me now, that’s going to be by far the best” (LT/C4/18). Such an approach would give people time to think about their answers but was still confidential (LT/B). It could provide more qualitative information (T/B1), for example, why a staff member was unhappy and “what you could do about it to improve the situation” (LT/A1/17), as well as what people were currently achieving, valuing and enjoying (P/C). It was understood that this would have to be a different form of testing instrument, not generic (P/C). It would need to be practical (LT/C4, T/B7) and require the interviewee to trust the interviewer (LT/C4, S/A1), as the degree of openness would depend on whether you were “comfortable telling the person” (S/A1/24). The interviewer would also have to be careful not to “put too much weight on one person’s individual experience” (T/C5/15).

Some staff in school A thought their performance reviews with school leadership worked well and gave them an alternative method of monitoring organisational health (LT/A1, S/A1, T/A3, T/A4). An interviewee in school B liked a leadership development program with which she had been involved which required people to assess their own behaviour and the behaviour of others as leaders, because it encouraged people to be “really honest” (LT/B/16), while the principal also thought it could prove to be a useful measure of organisational health (P/B). Another interviewee suggested looking at
“objective data” (LT/C3/16), such as sick days taken, as well as observing staff behaviour and interaction.

Other comments
A number of interviewees commented on their overall approach to the SOS in answering these questions. In contrast to their views of other staff, most interviewees stated they did the SOS accurately and honestly (LT/A1, LT/C2, LT/C3, S/B, T/A1, T/A4, T/A7, T/B4, T/C2): “a good reflection of how I’m feeling” (T/A4/17), “as close to it as possible to how I feel” (S/B/12). One interviewee commented that she “read each question” (T/A1/18) carefully and “thought about how I feel” (T/A1/18). However, some staff indicated that they didn’t spend much time on the survey (T/B5, T/C1): it was “tedious” (T/C1/19) and “a waste of my time” (T/B5/20), a routine chore that had to be done (T/B7). One interviewee observed that she put more weight on it now that she was on leadership team (LT/A1), and another, that if people cared a lot about the SOS, they “would fill it out very accurately and carefully” (T/B8/13), but if they were busy they would take less care with their responses. Other interviewees indicated that the tone of their responses was generally positive about the school (AP/C, LT/C2, T/C1), found the SOS “nerve-wracking” (T/B2), because of the need to take into account all the people involved when responding, or were sceptical about things from the government (S/B/11).

Interview question 19: One statement in the survey which required a response was “There is a good team spirit in this school”. What do you think team spirit means and why was the question asked?

This question, examining interviewee construction of one of the group morale questions in the SOS, was asked in 36 interviews. Team spirit was commonly defined by interviewees in all three schools as having cohesive social characteristics related to morale. Interviewees also reflected on team spirit within their own school context, thought to be high in school A, evident but less developed in school B, and more limited in school C.
Definitions of team spirit

Key elements of definitions of team spirit were characteristics of unity and co-operation related to teamwork, such as being willing to work together to achieve a common goal (AP/C, S/A1, S/B, LT/C1, LT/C4, T/B1, T/B3, T/B7, T/C2, T/C3), and pulling in the same direction (LT/A1, LT/C1, LT/C4, S/A1, T/A1, T/C3). Team spirit meant having “a unified determination” (LT/C4/19), “that teamness, oneness” (T/C1/19). It involved common understandings, expectations and aims (P/A, T/B6, T/B8). It meant “a shared vision of the school” (P/C/18); “where people share a view of the world as it is, and a view of the world as they want it to be” (P/A/23); “a unity of purpose and a sense of where it’s going” (LT/C3/16). There are accepted processes (AP/B) and “a consistent way of dealing with things” (T/B8/14). Where team spirit is high, the school has a focus on progress and improvement for the betterment of students (LT/C3, T/A1), “making it a good place for kids to learn” (S/A1/27). Staff with good team spirit are happy to be at work (LT/C1), and have a sense of energy and enthusiasm (T/A5).

Team spirit also involves staff trusting and supporting each other (LT/A1, LT/B, P/C, T/B1, T/C1, T/C5), relying on other team members (LT/B, T/C3), and working for them to achieve goals (T/B7): “when you work, you don’t work in isolation” (P/C/18); staff are “willing to have a go at something together” (T/C1/19). People will not only do their share but expend additional effort for the team (S/A1, T/B3, T/B/5), surmounting individualism: “people willing to go that extra yard to help out their colleague” (LT/A1/18); staff who “go out of their way to assist each other” (T/B2/26). When there is a problem “you just drop it and you just go and help” (S/C1/18); if there is a “crack in the wall, you fix it up somehow” (LT/C2/20). Team spirit involves a sense of openness and clear communication (AP/C, LT/B), as people “talk and share ideas and things with other staff members” (T/A4/18), are “comfortable to express their opinions” (AP/C/21), and don’t undermine each other (AP/B). Staff with good team spirit co-operate and get along (LT/C1), feel appreciated, and acknowledge and respect each other (LT/A2, LT/C1, T/B3): “everyone recognises each other’s weaknesses and strengths” (T/B4/22). Team spirit involves a sense of tolerance, being prepared to listen to other people (T/B7/12) and having one’s own views equally valued (AP/C, LT/C1): “being willing to take a step back and be part of the group, and make your contribution and accept other people’s contributions as well” (T/C5/17). Problems become a shared team responsibility (T/A2, T/A4): “we’re all in it together” (T/A4/18), “it’s all our
responsibility to change that behaviour or support that teacher in changing that behaviour” (T/A4/18). The sense of camaraderie extends beyond work to social events as well (P/C).

In answering the second part of the question, interviewees explicitly linked team spirit with high morale, highlighting resource sharing, widespread support and help, unified thinking, acknowledging success, and informal social interaction (LT/A1, S/C2, T/A3), “feeling included, feeling part of something” (T/A3/22). Morale was associated with team spirit because if you felt unsupported, not part of a team, you would be “a loner in a school . . . [and] you wouldn’t feel as good about yourself or your job” (LT/A1/19). Interviewees also commented on team spirit in their own schools.

*Team spirit in schools*

Staff in school A considered team spirit was central to the ethos of the school (LT/A1, T/A6, T/A7). The school was organised in professional learning teams, meaning that staff always had colleagues to help them (LT/A1): “you really have to work in a team here” (LT/A1/19). The staff worked together easily and shared thoughts and views (T/A1). Where opinions varied, staff communicated and compromised until people were happy and agreed with the outcome (T/A1) because “everyone respects one another” (T/A1/19). Team spirit was reflected by support for each other’s well-being (S/A2): “we do talk and ask and find out about other people” (T/A4/18); “we all get through, and if one of us isn’t doing too well, the other three step up” (LT/A2/30). Examples of good team spirit in the school included effective team teaching, looking after relief teachers, laughter and chatting in the staffroom, and frequent staff social functions (LT/A1, LT/A2). It was felt team spirit had developed gradually in the school. There was a time when people didn’t share problems, “it’d look like you weren’t coping” (LT/A1/19), whereas now the “whole school works as a team” (P/A/23).

Interviewees in school B referred less to their own context in discussing team spirit. Of those who did so, team spirit in the school was thought to be pretty good by some interviewees (T/B1, T/B2, T/B7), but never 100% (T/B7). One interviewee observed there were a number of good teams in the school who “band together to do something that they think is really worthwhile” (T/B6/18). Another thought that staff shared a common approach to students but that some teams were stronger than others (T/B8).
Support amongst staff was felt to be a real strength of the school (T/B1, T/B5): “we do that really well” (T/B5/21), “people do offer a lot of collegiate support and try to help each other” (T/B2/26). Examples of good team spirit in the school included staff offering assistance with athletic events (T/B2, T/B4) and staff helping a student manager with problems (LT/B). A first-year teacher thought a teamwork initiative had helped her teacher team by establishing “what we want to do, and this is why we’re here, this is how we want people to see us” (T/B8/15), making her feel her opinions were now more highly valued.

Interviewees in school C generally thought team spirit amongst staff was lacking to a degree (AP/C, LT/C4, S/C2, T/C2, T/C4). Although most staff teamed together well and supported school goals (S/C2, T/C2), there were people unhappy with the leadership (S/C2), and not “totally on board” (S/C2/15). There was a group of enthusiastic and motivated staff, and others jealous of them (LT/C4): “if you could get them all heading in the same direction, it’d be great” (T/C2/18). Team spirit was good when things were going well, but if anything went wrong, people took things hard which “aren’t really that bad” (T/C4/22). One interviewee took a contrary view, commenting that it was difficult to think of someone “extra the team” (LT/C2/20). Examples of good team spirit in the school included staff helping out with athletics sports and excursions, and camaraderie during professional development activities (LT/C1, LT/C2).

**Interview question 20:** I am going to read you a list of words which were used in survey questions. Would you mind telling me whether you think they refer more to stress or morale, or equally to both?

- Pride, depression, cheerfulness, frustration, anxiety, energy, enthusiasm, tension

This question was asked in 36 interviews. Interviewees were given a series of stimulus words used in SOS questions on stress and morale to see whether they placed them in the same categories as in the SOS, and to examine the type of thinking used in their responses. Table 10 shows the response to each stimulus word.
Table 10
Response to SOS stimulus words as stress/morale

<table>
<thead>
<tr>
<th>SOS use</th>
<th>Stress</th>
<th>Morale</th>
<th>Both</th>
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</thead>
<tbody>
<tr>
<td>Distress words</td>
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<td></td>
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</tr>
<tr>
<td>Depression</td>
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<td>1</td>
<td>10</td>
</tr>
<tr>
<td>Frustration</td>
<td>24</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td>Anxiety</td>
<td>25</td>
<td>-</td>
<td>11</td>
</tr>
<tr>
<td>Tension</td>
<td>23</td>
<td>1</td>
<td>12</td>
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<tr>
<td>Morale words</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Pride</td>
<td>1</td>
<td>31</td>
<td>4</td>
</tr>
<tr>
<td>Cheerfulness</td>
<td>3</td>
<td>23</td>
<td>10</td>
</tr>
<tr>
<td>Energy</td>
<td>3</td>
<td>22</td>
<td>11</td>
</tr>
<tr>
<td>Enthusiasm</td>
<td>1</td>
<td>27</td>
<td>8</td>
</tr>
</tbody>
</table>

Most interviewees placed the words in the same dimensions as used in the SOS, although up to one-third considered the words applied to both stress and morale dimensions.

**Interview question 21:** I am going to read the list again. Do you think they apply more to individuals or groups or equally to both?
- Pride, depression, cheerfulness, frustration, anxiety, energy, enthusiasm, tension

This question was also asked in 36 interviews. Table 11 summarises these responses.

Table 11
Response to SOS stimulus words as individual/group

<table>
<thead>
<tr>
<th>SOS use</th>
<th>Individual</th>
<th>Group</th>
<th>Both</th>
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</thead>
<tbody>
<tr>
<td>Individual and group words</td>
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</tr>
<tr>
<td>Pride</td>
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<td>1</td>
<td>24</td>
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<td>Depression</td>
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<td>5</td>
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<td>Anxiety</td>
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<td>-</td>
<td>10</td>
</tr>
<tr>
<td>Energy</td>
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<td>4</td>
<td>30</td>
</tr>
<tr>
<td>Tension</td>
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<td>8</td>
<td>17</td>
</tr>
<tr>
<td>Individual words</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cheerfulness</td>
<td>13</td>
<td>4</td>
<td>19</td>
</tr>
<tr>
<td>Group words</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enthusiasm</td>
<td>7</td>
<td>5</td>
<td>24</td>
</tr>
<tr>
<td>Frustration</td>
<td>15</td>
<td>3</td>
<td>18</td>
</tr>
</tbody>
</table>
Interviewees applied most of these words to both individual and group, except for the negative stress emotions of depression, frustration, and anxiety, which were regarded as strongly individual characteristics (depression and anxiety were used in both individual and group dimensions in the SOS and frustration only in the group dimension). There was a degree of variation between interviewees, ranging from one interviewee who answered “both” for all sixteen elements, to three who did not answer “both” for any element. One interviewee answered “stress” for all eight stress and morale elements.

Interviewees demonstrated different patterns of thinking when replying to questions 20 and 21. Some interviewees answered immediately, definitely and without elaborating, while others hesitated or deliberated more over their choices and gave explanations. It seemed to be that the longer interviewees thought about their answers, the more difficulty they had in pinning down responses: “I’m not thinking about it or I’ll never get an answer out” (T/A2/16). Interviewees seemed to think about stress and morale concepts in terms of positives (morale) and negatives (stress) (LT/A2, LT/C3, T/A2), or about the relationship between them, meaning both could be involved in any particular emotion. For example, enthusiasm could be “morale and lack of stress” (T/C5/18), and frustration “very much stress, but there’s certainly going to be effect on morale” (LT/C4/19), while “if you’re stressed you don’t have energy, and . . . if you haven’t got a high energy level, you probably can’t even lift or maintain your morale” (S/A2/28). When considering whether concepts were individual or group, most people seemed to think personally: “I haven’t really been frustrated” (T/A1/20), “fits into both but probably more individual, certainly speaking as myself” (P/A/24). They also thought of the degree to which the emotion was shared between people: (energy) “that’s everyone, that’s groups” (T/A4/20) or “very individualistic” (LT/C4/20); with many “individuals depressed, that’s going to depress the group” (LT/C4/20).

Interview question 22: If I asked you to do the Staff Opinion Survey again, do you think you would give the same responses as on the last occasion? Would they be the same as last year?

This question was asked in 34 interviews. Depending on when each interview was done in the year (before or after the SOS), the time between the interview and when the interviewee had last done the SOS varied from a few days to twelve months. Where the
interviewee had done the current SOS and indicated their responses would not generally have changed since doing it, a follow-up question was asked about whether the response would have changed since the previous year.

Of the 27 interviewees asked about the SOS done that year, 24 thought their responses would be the same or probably similar, two thought their responses would probably be different, and one couldn’t remember. Of the 28 interviewees asked about the previous year’s SOS, there was more variation. Fourteen thought their responses would probably be similar, seven thought they would be more positive, one said they would not be the same, two answered “not necessarily”, and four others couldn’t remember, were new to teaching, or were in a different school.

Many of the interviewees explained why their responses would probably have been similar or likely to have changed between SOS and interview. For those who thought their responses would be similar, comments included: “not a lot’s changed” (LT/C1/32) and “anything that I responded to in a less favourable sense, I still feel is an issue here and anything that’s positive, I still feel is positive” (T/A3/24). A range of explanations were given for perceived changes in response, which were both work-related and personal. These included factors associated with the school in general: the “school’s moved on since last year” (AP/B/22), the “place is moving” (P/C/20), or with an individual, such as a change in teaching areas (T/B1). Response was also affected by experience, with staff newer to the school having changed their attitudes (LT/B, S/A1, T/A6, T/C5): “I just didn’t feel as much a part of it” (S/A1/29), “on a steep learning curve” (T/C5/19). There were also personal changes, such as the use of successful stress reduction strategies (S/B), feeling “things have changed for me quite radically” (T/B5/24), and having had a “bad year home wise” (T/C2/16). One interviewee thought it was “just a matter of where my head was at the time” (LT/A2/31), which she felt had to be reflected in her SOS response: “I can’t see how it couldn’t be, even if I was consciously trying not to, I bet it was” (LT/A2/32).

Some interviewees commented again on the inherent changeability of their responses (AP/B, S/A2, T/A5), the unpredictable impact of “personal circumstances” (T/B2/28): “it can be how you’re feeling on the day, or an hourly thing, or even that minute” (S/A2/30); “I bet I wouldn’t answer the same. But there’d be no reason why I
shouldn’t” (T/A5/35). They gave examples of how a “blow-up” (LT/C2/21) might affect response: if a “parent tore strips off you, you’d be thinking . . . “blow, I hate this place. Five minutes later you think, oh, I shouldn’t have written that” (S/A2/30). Another interviewee thought changes in interpretation might mean that you “could get quite different answers” (LT/C3/18) each time you responded. These observations supported the reservations about the SOS which had previously been expressed.

**STAFF OPINION SURVEY DATA**

The case study schools made available some of their SOS results for this research which are discussed in this section. The break-up of information provided to schools has varied somewhat from year to year, but has generally included reference to overall response rate, school percentile rank by dimension against all government schools and schools of the same type, such as primary or secondary, and break-up of response to each question. The relevant years for each school are 2004-2005 (school A), and 2005-2006 (schools B and C), the year of the interviews and the year preceding them.

In examining this information it needs to be remembered that the benchmarks do not discriminate between schools of different sizes, and that there are statistical differences between the benchmarks for all schools and for like schools, with primary schools having scored consistently higher on SOS measures than secondary schools (with P-12 schools falling in between the two). To give a realistic picture of each school, only like schools results are discussed here, which should not be directly compared between schools. Table 12 gives a summary of SOS data for each school (against like school benchmarks), including response rates, distress and morale dimensions, and key elements.

<table>
<thead>
<tr>
<th>SOS element</th>
<th>Measure</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>School A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Response rate</td>
<td>Number</td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Response rate</td>
<td>Percentage</td>
<td>N/A</td>
<td>69</td>
<td></td>
</tr>
<tr>
<td>Individual distress</td>
<td>Like schools percentile</td>
<td>61</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>School distress</td>
<td>Like schools percentile</td>
<td>59</td>
<td>76</td>
<td></td>
</tr>
<tr>
<td>Individual morale</td>
<td>Like schools percentile</td>
<td>69</td>
<td>69</td>
<td></td>
</tr>
<tr>
<td>School morale</td>
<td>Like schools percentile</td>
<td>66</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Empathy</td>
<td>Like schools percentile</td>
<td>54</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Clarity</td>
<td>Like schools percentile</td>
<td>38</td>
<td>71</td>
<td></td>
</tr>
<tr>
<td>Engagement</td>
<td>Like schools percentile</td>
<td>57</td>
<td>69</td>
<td></td>
</tr>
<tr>
<td>Learning</td>
<td>Like schools percentile</td>
<td>69</td>
<td>82</td>
<td></td>
</tr>
</tbody>
</table>

**School B**

| Response rate | Number | 50 | 56 |
| Response rate | Percentage | 66 | 72 |
| Individual distress | Like schools percentile | 49 | 41 |
| School distress | Like schools percentile | 53 | 42 |
| Individual morale | Like schools percentile | 53 | 59 |
| School morale | Like schools percentile | 66 | 75 |
| Empathy | Like schools percentile | 40 | 63 |
| Clarity | Like schools percentile | 50 | 53 |
| Engagement | Like schools percentile | 56 | 74 |
| Learning | Like schools percentile | 30 | 53 |

**School C**

| Response rate | Number | 31 | 30 |
| Response rate | Percentage | 76 | 60 |
| School distress | Like schools percentile | 36 | 26 |
| Individual morale | Like schools percentile | 21 | 8 |
| School morale | Like schools percentile | 45 | 36 |
| Empathy | Like schools percentile | 26 | 18 |
| Clarity | Like schools percentile | 19 | 14 |
| Engagement | Like schools percentile | 28 | 24 |
| Learning | Like schools percentile | 30 | 18 |

The SOS data for school A indicated a school in markedly better organisational health than other primary schools (and, by extension, much better than all schools) across most dimensions, including distress and morale, with improvement between 2004 and 2005 (the year of the interviews). One dimension which was lower than average in 2005 was effective discipline policy (37%). Clarity had been down relative to the other areas in 2004 but improved significantly in 2005. These figures are in line with the subjective ratings given by interviewees for individual and staff morale.

The data for school B showed a school of similar organisational health to other secondary schools in 2005 (but well below all schools), and slightly better organisational health than other secondary schools in 2006. In 2005, individual dimension scores ranged from below to above average for like schools, with professional growth being particularly low (7%), while supportive leadership was 40%. Key element ranks generally rose in 2006 and morale measures also increased, but distress measures decreased (meaning distress was higher). Individual dimension scores
were also higher in 2006; mostly average to above average for like schools, with exceptions including professional growth (still 7%) and excessive work demands (13%), while supportive leadership rose to 63%. The data indicated a school of higher morale than like schools, but also higher distress. The two particularly low dimensions (excessive work demands and professional growth) fitted with subjective observations by some staff of heavy workloads in the school and concerns about their needs being not met by leadership.

The data for school C showed a school in worse organisational health than like schools (and well below all schools), with a decline between 2005 and 2006. In 2006 most dimensions were significantly below like schools, with the exception of classroom misbehaviour (above) and effective discipline policy, student orientation, student motivation, and learning environment (close to average). Supportive leadership was 18%. The data indicated a school of particularly low individual morale and high individual distress. These figures fitted with subjective observations of a school with a section of staff unhappy with their work environment, apart from elements relating to students and their learning.

**SUMMARY**

This chapter has provided a description of the three schools settings, the interview sample from each school, the findings from the interviews, and SOS data. Most of the chapter has been devoted to a detailed description of the interview findings under interview question headings, relying substantially on the words of interviewees to provide a rich, contextually embedded account. The following chapter summarises these interview findings.
CHAPTER FIVE – RESEARCH FINDINGS SUMMARY

The summary of research findings from the interviews is presented in this chapter. A more detailed account of these findings, referring directly to the source material on which they are based, together with a description of the school settings, interview sample, interviewee profiles and SOS results in each school, is given in the previous chapter. The summary of research findings covers change factors, well-being, stress, morale and the SOS.

CHANGE FACTORS

This section examines the perceived change factors in each school from the perspective of the interviewees. Each of the schools was seen to be experiencing change but the nature of this change varied from school to school. There was some commonality within each school about the more significant changes which had occurred, although not necessarily on the need for or impact of these changes. In school A the emphasis was on changes caused by school growth, in school B it was a principal-imposed change in direction and expectations, while in school C it was a combination of factors including curriculum reform. The findings from each school are presented separately, with the views of the acting principal or principal given before those of the rest of the staff.

SCHOOL A

During the period of the research, the primary school had an acting principal in a caretaker role as the incumbent principal was on leave. The acting principal, who had come to the school as a leading teacher in the previous year, observed that the main element of change in the school was the rapid increase in student enrolments, which had doubled within a few years, and were expected to continue to grow. This had resulted in pressures on the physical capacity of the school and increased student well-being needs. The school had addressed these needs through specific programs but this area remained the most immediate priority for the future. The acting principal thought that the growth of the school had also provided challenges for staff and leadership in terms of school structure. The larger staff group meant staff had to work harder to maintain good communication; and some staff were still acting as if it were a much smaller school.
The staff echoed his comments about the increase in student enrolments being the major change factor in the school, highlighting a rise in issues concerning student well-being and behaviour. Many of the interviewees had been in the school since it was much smaller and in a predominantly rural environment. They described the demographic changes which had occurred as the district had become a growth area for a nearby regional town. As well as the student enrolment increasing, it had also changed in nature; with most of the families of the students now part of the commuter belt, rather than being based on farms. This had been accompanied by changes in student behaviour. More time was spent on dealing with disciplinary problems which had affected the well-being of some staff. A larger school meant a number of newer teachers coming in, which was regarded as a positive for the school, but being part of a larger group also meant that older staff had to adapt and change the way in which they worked. Despite these changes, staff felt that the essential culture of the school had been maintained, that it still had the feel of a country school, with a strong sense of community and belonging, and was a good place in which to work. In this school the principal and the staff seemed to have a shared understanding of change factors and their impact.

SCHOOL B
The principal of the secondary school had been in the position for six years and had taken up the role at a time when enrolments were declining. His initial impressions had been of a school with a very tight, insular culture and a stagnant staff who had low expectations of what the school and students could achieve and made excuses for poor performance. When he prioritised areas for change, his focus was on school improvement by doing things better and enhancing outcomes. Since his arrival, he had engineered reforms aimed at raising enrolments, improving academic results and increasing the profile of the school in the community. He began new initiatives for students such as specialised computer and sports programs, and changed the physical surroundings to increase pride in the school. He also tightened up on staff performance in areas such as attendance at meetings, setting timelines for reform, documenting progress, and unifying the leadership team. A strong induction program for new staff ensured cultural change was sustained. The principal commented that the reforms had not been undertaken without opposition and that some staff had to be directed to carry
out change or had left the school as a result. He now saw the school as being in good health, with processes in place to make sure the school continued to move forward.

The staff interviewed agreed that the majority of recent change in the school had been directly due to the current principal and his top-down approach. They described how he had changed the whole feeling of the school, altering its organisational structure and improving its appearance, and changed the attitude of the community towards it. The staff considered that the reforms had been generally positive, and thought well of the principal for introducing them, comparing him favourably to previous principals. However, there was a widespread feeling that some of the changes had been tough on staff, and had resulted in increased pressure and workload, which was affecting their capacity to perform at a high level. Staff fatigue had increased which had impacted on staff morale. A particular cause for complaint was the constant cycle of compulsory meetings which reduced time available for informal communication and completing other tasks. The staff felt that these concerns were not fully understood by the administration. In this school the principal and staff agreed on the characteristics of the change factors which had occurred but differed in their perceptions of the impact of these changes on staff.

SCHOOL C

The principal of the P-12 school had been in the position for three years. She described how her appointment had met with opposition from some staff and how there was a continued reluctance of some staff to accept necessary change in the school. The principal felt that many staff were self-motivated and enthusiastic, and embraced the curriculum reform which she had initiated, but that the resistance of a minority of staff was holding the school back. In talking about change, her main pre-occupation was the inability of some long-established staff to accept that there was a need to alter the way in which they worked and to respond to new educational priorities and initiatives.

Staff in this school likewise identified curriculum reform as the main change area affecting the school and had also observed divisions between staff. Some staff had supported the curriculum reform enthusiastically but others had displayed a negative attitude and were resistant to change. Interviewees attributed this lack of unity to the staff having been extremely stable over a long period of time. They felt that some staff
had been there too long and had become too set in their ways, and that the recent introduction of new staff was welcome. Other changes mentioned by staff had resulted from a gradual increase in the size of the school and broadening of the student enrolment catchment. Some interviewees regretted the change in the nature of the school from being a school based on the local farming community, where teachers and students lived close by, to one which drew students from a broad area and whose teachers lived further away. They felt that the school had lost a sense of family and togetherness it once had. In this school the principal and staff generally agreed on the nature of the change factors which were occurring, but there were differences within staff on the perceived benefits of these changes, highlighting divisions between them.

WELL-BEING

This section examined elements of well-being amongst staff. Interviewees were asked about their construction of well-being and how well-being could be improved amongst the staff of the school in which they worked. They were also asked about what gave them job satisfaction, and to provide a brief description of their own personalities. Responses suggesting ways of improving staff well-being showed variations between schools. These findings are presented separately by case study, while other interview findings in this section have been combined.

CONSTRUCTION OF WELL-BEING

When asked to define well-being, interviewees interpreted it as being a characteristic of individuals and to mean being healthy in a holistic sense. Well-being incorporated all parts of one’s life, both at work and at home, and encompassed mental, emotional, physical and social elements. Having a high level of well-being meant being happy, healthy and content. Well-being at work was perceived as meaning an individual wanted to come to work, enjoyed the job, and felt relaxed and positive about it. A well-developed sense of well-being was displayed in a staff member being able to work to their best capacity and feeling acknowledged for their efforts. This resulted in job satisfaction, which meant staff were better able to deal with work-related stress and led to good morale.
Interviewees felt that those responsible for staff well-being in a school should show a concern for their mental and physical health by looking after them and monitoring workload and stress levels. It was important that staff felt that they wanted to come to work, that they felt happy to be in the work environment, and considered themselves valued and appreciated. Interviewees thought that support was an important element in maintaining well-being and dealing with stress, and should be a priority of those in leadership positions. They needed to listen and respond to staff needs, especially those concerning workload and student behavioural issues. This general construction of staff well-being implied a perception of self which extended well beyond the immediate work context and its influences. It assumed an obligation on the employer to monitor and control the impact of work on an individual’s overall health, and of their overall health on their work. An alternative administrative viewpoint was that perceived well-being of individual staff did not always fit with what was best for the school as a whole.

IMPROVING STAFF WELL-BEING
Interviewee perceptions of how well-being of staff could be improved varied between schools and seemed to be shaped by particular organisational contexts. Interviewees focused mainly on work factors impacting on well-being and how they could be addressed. Concern for the well-being of staff was felt to be already well-established in school A, while the main well-being issue in school B was workload pressure, and in school C there were a range of factors described. Work demands were mentioned to some degree in all three case studies.

School A
There was a widespread perception amongst interviewees from this school that the well-being of staff was already a high priority within the organisation and consequently that most areas of existing practice required little improvement. In particular, the interviewees considered that the administration looked after staff and supported them wherever possible, not only in relation to work issues, but also in dealing with issues external to work. The administration understood that for staff to be able to perform at their best, they needed to have their own lives in order. Staff felt busy at work, but considered that their workload was under control. Where suggestions on further enhancing well-being were made, these involved restricting the length of meetings,
continuing to focus on communication, support, and unity within the school, and maintaining regular social events for staff.

**School B**

In the secondary school, in contrast, most interviewees felt that there were major work-related well-being issues which were impacting on staff. Foremost amongst their concerns were the number of regular meetings staff were required to attend, which depleted energy and took time away from other tasks, such as meeting student needs, planning curriculum, and informal networking between colleagues. They thought that that their efforts were spread too thinly because of the range of educational programs and initiatives with which they were expected to be involved. Staff also felt that they did not have sufficient control over their work. Addressing these issues required the administration acknowledging, monitoring and reducing workload pressures. Some interviewees also talked about how staff could benefit from being trained to deal with stress, such as learning relaxation techniques and developing more self-awareness. A dissenting voice came from the assistant principal who considered that dealing with well-being issues was the responsibility of all staff, not just the leadership group, because well-being was significantly affected by social interaction.

**School C**

Well-being of staff was also an issue in this school, but there were a range of views about how it should be improved. Suggestions included reducing workload, including the length of meetings, greater acknowledgment and recognition of staff by the administration, and providing new facilities. Staff welcomed a professional development initiative involving a group visit to other schools which they thought increased staff unity. Some interviewees commented that a number of the work-related well-being issues which existed amongst staff would not be easily addressed, for example, staff who were unhappy because they were jaded with teaching, or were resistant to educational change and continued to hark back to the past. The principal felt that people with work-related grievances needed to be more open about them and not to bring down the well-being of more energetic and enthusiastic staff through their negativity.
JOB SATISFACTION

Interviewees were asked about what gave them job satisfaction. The most significant aspect of work which gave job satisfaction to staff was having positive experiences with students, particularly in the classroom, but also indirectly through the provision of programs which made a difference to their learning or well-being. This response was similar across all three schools, and extended across all staff from leadership team members to SSOs. It was particularly apparent in the primary school (school A), where the comment “love the kids” was almost universal and implied a close emotional attachment between staff and students. Staff described a range of related experiences which gave job satisfaction. These included teaching students to read, seeing a class progress, developing a curriculum-related theme day, and organising an overseas trip for students. These experiences were often described in some detail. Staff derived satisfaction from seeing student success, improvement and creativity, and from feeling that they had contributed to this progress by making a difference to the learning which had occurred. Some interviewees saw it as self-evident that a focus on students was central to one’s philosophy of teaching and education in general, and questioned teachers to whom this did not apply.

Less frequently mentioned elements of job satisfaction were positive feedback from parents, students or other staff, and being part of the staff social group. Job satisfaction for administrators mostly came less directly from putting in place initiatives or developments which had made the school a better place. Some interviewees also mentioned factors which detracted from job satisfaction, such as administrative tasks taking them out of the classroom, which particularly affected those in leadership positions, and, to a less extent, student attitudes to learning. What seemed at the heart of job satisfaction for all staff was feeling they had personally contributed to the development of student learning or well-being which may not have occurred otherwise. Staff did not mention salary when discussing either the positive or negative aspects of job satisfaction.

PERSONALITY

When asked to describe their own personality in three or four words, staff tended to use words such as happy, caring, positive, easy-going, outgoing, friendly and optimistic. The word “happy” was most frequently applied by staff in school A, but otherwise there
were no obvious differences between the schools. If anything, these self-descriptors were more typical of a positive attitude towards life, and of staff seeing themselves as more carers than managers. A number of interviewees found the question difficult to answer.

**STRESS**

This section examines the construction of stress by interviewees, their experiences of stress, and their perceptions of common causes of stress amongst staff. There were variations between the three schools in views of staff stress. These findings are presented separately by school, whereas the other findings in this section are combined.

**CONSTRUCTION OF STRESS**

When asked what stress meant to them, most interviewees were readily able to describe their understanding of the term, although a minority of interviewees, mostly those newer to teaching, indicated they did not suffer from stress personally. Stress was mostly described in negative terms, although some positive aspects were mentioned as well. Definitions of stress included psychological and physiological elements as well as impacts on daily functioning. Stress was generally construed as a characteristic of individuals although it could be manifested in aspects of social behaviour.

Common elements to perceptions of stress were psychological feelings of being overwhelmed, unable to cope, and a loss or lack of control. Interviewees described being faced with events which continued to build up until they became too much and there was a breaking-point. Stress was associated with emotions of anxiety, unhappiness and nervousness. Interviewees described stress as dominating thoughts and leaving individuals feeling under pressure and unsupported. Stress could be accompanied by physiological symptoms such as headaches, difficulty in sleeping, muscle tension and a general sense of being unwell. Many definitions of being stressed involved behavioural consequences concerning reduced effectiveness at work, as the feeling of being overloaded made it difficult for staff to function effectively. When stressed, staff would experience a sense of not meeting expectations, a lack of achievement and sometimes greater difficulty in the classroom. Stress would be further manifested in aspects of social behaviour, in a sense of isolation, in greater difficulty in dealing with other
people and consequent social withdrawal, and in over-reaction to minor issues. Negative stress would also impact on life outside work. Stress was also seen as having positive aspects by some interviewees, stimulating them to get motivated and get things done, but only to a limited extent and over a short period of time.

INDIVIDUAL EXPERIENCES OF STRESS
When describing their experiences of stress, interviewees explained that causal factors could come from any part of their lives, from aspects of work or from external issues such as those relating to one’s health or family. Examples of stressors provided by interviewees included facing dual pressures from work and life on a farm, coping with a death in the family, and having to deal with a cumulative build-up of pressures. Examples of stress at work included being confronted by an aggressive parent, having to reapply for a job, conflict with leadership and other staff, career disappointment and adapting to curriculum reform. Some interviewees described their experiences of stress at considerable length. One particularly detailed account of a stressful situation involved a primary teacher recounting a violent incident in the playground of a school in which she had worked a number of years previously. The factor which seemed to cause most stress for this interviewee was a feeling of being unable to protect the young children under her care. Most experiences of stress seemed to involve being faced with a situation which was subjectively perceived as being in some way out of control, and which was characterised by feelings of powerlessness and an inability to cope. This situation could be generated through a build-up of events or from one major traumatic stressor.

CAUSES OF STRESS
Interviewees were questioned about what they perceived to be the main causes of stress for staff in their own schools. The interpretation of stress factors for staff varied between schools and within each school, particularly in school A. Excessive workload was mentioned in all three contexts and factors relating to the workplace predominated. Some interviewees reverted to talking about their own experiences of stress rather than causes of stress for the staff in general, emphasising the individuality of stress.

There were a diversity of views on the extent and nature of stress in school A, with some interviewees indicating they hadn’t observed much stress amongst staff. Two
causes of stress mentioned by a number of interviewees were workload pressures, especially administrative tasks which took teachers outside the classroom, and the negative impact of a few students with major behavioural problems. Other perceived stressors for staff came from poor communication, adapting to change, and meeting their own high expectations. The acting principal thought stress came from dealing with other people; the balance between what was within and outside your control.

The dominant elements in perceived causes of stress for staff in school B were similar to those mentioned when discussing staff well-being: excessive workload and work demands. These included being constantly expected to carry out a range of extra administrative tasks such as writing new curriculum, implementing changes to assessment and reporting, and attending numerous meetings. Interviewees thought that this continual pressure to get things done made it difficult for staff to carry out each task properly and took time away from helping students. Another factor mentioned as causing stress for staff was classroom management, especially relating to student discipline.

Workload was also perceived as an issue causing stress for some staff in school C, but the major stress factor regarded as impacting on staff was a general resistance to change amongst some staff members. A particular focus of their dissatisfaction was changes to curriculum and assessment, including a move towards thematic, team-based teaching. Some long-standing members of staff would not accept that they needed to change their methods of teaching and considered that their teaching expertise and experience were not respected by these reforms. Other perceived causes of stress were divisions and conflict between some staff, and unhappiness with leadership.

MORALE
This section examines understanding of high and low morale by interviewees, perceived morale of school staff, perception of personal morale, and the possibility of having high stress and high morale simultaneously. The findings concerning staff morale are presented separately by school while the other findings are combined.
HIGH MORALE

There was general agreement in perceptions of elements of high morale across interviewees in all schools. High morale was identified both in terms of individual characteristics and through aspects of group behaviour. Individual characteristics of high morale in the workplace involved feelings of happiness and enthusiasm, satisfaction with work, and a sense of belonging. A staff member with high morale would want to come to work and find it a good place to be when they were there. Such a staff member would have a sense of achievement, feel confident and in control, and be prepared to put in extra effort. High morale in an individual would be further reflected by a sense of attachment to the social group. This would involve appreciation and tolerance of other staff and, in turn, feeling valued and accepted by them. High morale would be exhibited in increased resilience and would be observable in the classroom through high quality teaching and teachers relating well to students.

Interviewees thought that staff with high morale as a group had a happy feeling and were full of energy, with staff working harmoniously and supporting one another. In a high morale staffroom there would be lots of chatter and laughter, people mixing easily and moving between social groups, and friendliness and open discussion between staff. A high morale staff was thought to have a strong sense of collegiality, with staff cooperating and working well together, and highly developed teamwork. In this environment people seem to share a common bond and there is a sense of unity and group cohesion. At the same time there is a level of tolerance and respect for others which means that diverse views are acknowledged and accepted, with the group willing to work through and resolve issues for the benefit of all. Communication operates at a high level in a high morale staff with people relating well to one another in both formal and informal interactions. Most importantly, people are willing to think beyond themselves and support others. Such support would include caring for and helping one another, not just professionally but on a personal level as well, for example, asking someone if they’re feeling alright and whether everything is okay. In a high morale staff, such a level of support creates a family-like atmosphere, a sense of inclusiveness extending to all its members, contrasting with an environment of individualism where people work in isolation and carry out their own work without worrying about other staff.
LOW MORALE
In contrast to high morale, understandings of low morale were based more on symptoms of group behaviour rather than individual characteristics. A staff with low morale was described as having poor communication, especially between teaching staff and leadership, a low level of energy, and a lack of social cohesion. It would typically have cliques or divisions, with individuals nursing work-related grievances which would be expressed through negative talk, complaining and underhand behaviour. People in a low morale staff work in a more restricted way, with less co-operation and a higher level of mistrust within the organisation. Conflicts occur regularly and are not resolved easily, with relatively minor issues often blown out of proportion. It was observed that low morale can be infectious, spreading from one staff member to another and dragging people down. Though most clearly evident in social interaction amongst staff, or the lack of it, low morale may also affect the quality of individual teaching, especially if caused in part by classroom management issues. However, interviewees also thought some staff could maintain commitment within the classroom but exhibit low morale elsewhere. Causes of low morale within the workplace were thought to include workload pressure, student behaviour and conflict with colleagues. Interviewees felt that giving staff a sense of being supported and not isolated was crucial to raising individual low morale.

STAFF MORALE
When interviewees were asked to gauge the level of staff morale in their own schools, clear differences between the case studies were apparent. The perceived staff morale in school A was significantly higher and more consistent than in the other schools, with most interviewees estimating staff morale as high, and all interviewees rating it as above average. Ratings of morale in schools B and C clustered around average, with responses ranging widely from below average to high in both schools. The interviewees accompanied their overall ratings with comments justifying their assessments of staff morale, which were often qualified by the observation that morale varied over time and between people.

Interviewees gauged morale as high amongst staff in school A through characteristics such as people wanting to be at work, a sense of togetherness, positive talk, everyone mixing in the staffroom, and social interaction outside work. In this school, teamwork,
camaraderie, and communication were perceived as being strong, a high level of support was apparent, and the administration were seen as being approachable. Cohesiveness was enhanced by the efforts of senior staff, by a mix of younger and older personnel, and by the willingness of people to adapt to and deal with challenges such as changes in student behaviour.

There was a general perception of staff being busy, overworked, tired, and a bit flat in school B, and lacking the buzz of high morale. The staffroom was often empty, with people off catching up on work, lacking the time to sit down, relax and chat. There were differences in perceived levels of morale between staff; some staff remained positive but others were struggling to cope with the pressure of work. Despite these variations in morale, interviewees felt that there was a sense of togetherness between staff, although not between staff and administration, and that the staff generally supported each other. The one interviewee who thought staff morale was high, the assistant principal, felt there was a considerable energy in the school, although people were not necessarily happy. The principal thought that morale could vary from being really low to very high during the year but was generally improving with the increase in younger staff.

There was a widespread perception in school C that although many staff were quite happy and worked well together, there was a group of older staff who were dissatisfied. They had grievances which were not openly expressed, based on a resistance to change and a feeling that the school had lost the sense of community it once had. There was a strong perception that morale varied between primary and secondary staff, with morale much lower and more variable amongst staff who taught in the secondary area. It was thought that the smaller group of primary staff tended to have a higher sense of teamwork and better developed communication, worked more closely together, and were more likely to discuss issues openly. In contrast the secondary staff were naturally more fragmented through working in their own subject areas and had some individuals with low morale. Staff who worked in both areas felt that primary staff were more enthusiastic and willing to embrace change whereas the secondaries felt more threatened by it and were suspicious of reform. Some interviewees attributed differences in morale to the nature of their work, with primary staff tending to be more nurturers and carers and being used to working collaboratively, whereas secondary staff were more diverse and were used to working more individually. A number of interviewees
expressed concerns about the apparent discrepancy between subjective observations of staff morale in the school and the level of morale as indicated by the poor SOS data. They felt that, despite a few individuals who were dissatisfied, the staff was generally positive and took pride in the achievements of the school. A leading teacher, who had recently come from another school, compared the level of morale he perceived in the staff, of people who seemed generally happy with life, with the much lower level of morale he had experienced in his previous school, where there was conflict between staff and a pervading negativity which was not apparent in this school.

A common characteristic of assessments of staff morale across the three schools was an observation that morale could fluctuate during the year, though this seemed to be felt less strongly in school A where the overall level of morale was more consistently high. Many interviewees thought that at any given point there would be variations in morale between staff and that cumulatively morale rose and fell at different times. Morale was noticeably lower in the middle of the year, at report-writing time, when staff were more fatigued and socially withdrawn, and higher at the end of the year. Because changes in the level of staff morale reflected a combination of variations in individual morale, they were naturally affected more deeply by issues which affected all staff or a number of staff, such as a change in leadership, and accordingly more by workplace than personal factors.

INDIVIDUAL MORALE
When asked to rate their own morale, most staff placed it as high or above average and only one interviewee as below average. Individual morale was noticeably higher in school A than the other two schools, although the difference was less marked than for perceptions of staff morale. Individual morale was rated lower than staff morale in school A, but higher than staff morale in schools B and C. Many of the interviewees identified variations in their own morale over time, in both upward and downward directions. This perceived variability was from year to year, during the year, or even daily, depending on pressures occurring at the time. Causes of downward changes in individual morale identified by interviewees included issues such as student behaviour, report-writing, and staff conflict, but also factors external to work such as having a new baby or concerns about family. Causes of upward changes in individual morale seemed to relate more to factors associated with work, such as moving to a new school, good
staff support, and being close to retirement. Some interviewees mentioned how they tried to avoid their own morale being lowered by work stressors, such as the negativity of other staff or adverse school achievement measures. One interviewee commented that a by-product of individual low morale was not contributing to the team as effectively as normal, and that the overall level of group morale could make up for one individual’s morale being lower than usual.

HIGH STRESS AND HIGH MORALE
Most interviewees thought that it was certainly possible to have high stress and high morale at the same time, though many qualified their answers in some way and indicated some form of relationship between the two concepts when explaining their reasoning. The concepts of stress and morale were mainly discussed as individual negative and positive characteristics but morale was perceived to be underpinned by social elements. It was argued that though the job could be stressful at times, that didn’t mean that you weren’t happy in your job or feeling unsupported, key elements of morale, and that you could be aware of your stress and still maintain a positive outlook. Another view was that you could have external stressors operating, but still enjoy coming to work. Some interviewees seemed to identify stress with events liable to create stress, arguing that morale remained high because the individual coped with the stressors and was still in control. Others implied that in some circumstances stress could be positive: feeling under pressure could be beneficial because it challenged you to a higher level of performance and therefore gave greater satisfaction, increasing morale.

The major qualification made by interviewees was that extended high stress will bring down morale. Initially, stress may make you work harder, but eventually your resources will be overwhelmed and morale will fall. This view seemed to imply that though morale had a more enduring and broader quality than stress, the two were connected rather than independent concepts. Some interviewees felt that some individuals coped better with high levels of stress and that high stress could be better dealt with if you had high morale. However, high stress across a group was more likely to reduce morale as those who were unable to cope would bring down other people. Those interviewees who thought high stress and high morale were not compatible distinguished between stressors or work pressures and stress. They felt that if stressors resulted in an
individual’s inability to cope, then individual morale had to fall, though they agreed that having high morale would better enable you to carry through the stressful times.

**STAFF OPINION SURVEY**

This section examines administration of the SOS, consistency of SOS response, attitudes towards completing the SOS, and thinking behind SOS responses. Findings from the different case studies have been combined.

**SURVEY ADMINISTRATION**

All but two of the interviewees completed the previous SOS for which they were eligible. One staff member had missed doing the SOS by an oversight, the other by choice, feeling it was not a priority. Interviewees in school A were asked whether the online method of doing the SOS was preferable to the previous paper method. They felt confident with the online technology and appreciated its enhanced confidentiality and anonymity. In all three schools staff considered they had received sufficient information about the SOS and were encouraged to undertake it. In one school, school A, where the SOS seemed to have particular prominence, a number of interviewees felt that the principal had been unnecessarily directive in her instructions to staff in the previous year by advising them to undertake the SOS when they were feeling relaxed, and to remember the possible implications of their responses on perceptions of the school if they were negative.

The dissemination of SOS results varied from school to school. In schools A and C the results were given to staff and discussed with them in some detail, but in school B the staff received only general feedback and were not given an opportunity to comment on the results. A number of interviewees in this school expressed frustration at not being given more information and considered that the SOS was a closed area for staff input. This affected their attitudes towards the SOS as it was felt that there wasn’t much point in doing it when their views had no discernible impact. Interviewees thought that leadership were not releasing or discussing the SOS results because they revealed patterns of low morale and high stress amongst teachers caused by excessive workload pressures. The assistant principal of school B justified not discussing SOS results with staff by explaining that it was a number of months since the SOS had been done, and
the school had moved on and dealt with the issues which the results had raised. In school C, on the other hand, where the poor SOS results had been discussed extensively amongst staff, the leadership expressed frustration at the SOS process and scepticism about the SOS in general. They believed that they had encouraged staff to detail their concerns openly and had subsequently addressed the issues which had been raised, but found the following year that this had little impact on the results. A number of members of the leadership team felt that some people were just using the SOS as a vehicle to attack the principal while remaining anonymous.

ATTITUDES TOWARDS THE SURVEY

Overall, opinions were equally divided as to whether doing the SOS had been a positive experience and whether it was a good way of finding out about staff well-being, with some interviewees having no strong feelings either way. Some of the interviewees who were generally positive about the SOS still expressed some reservations about aspects of SOS format or how the results were being used. Those interviewees who expressed criticisms or reservations about the SOS did so in much more detail than those who had positive things to say about it.

Some of the positive comments were that the SOS made people think more about the school in which they worked and their attitudes towards it; and that by giving staff a chance to comment, it made leadership more aware of staff opinion. It was also felt that because it was confidential, people could be honest in their responses. In one of the schools, school B, doing the SOS was seen by many interviewees as the only opportunity they had to express constructive criticism, other avenues for communication being closed. Another observation was that the SOS was a useful tool for schools which had identified organisational health issues which needed to be addressed and which provided benchmarks for comparison.

The major reservation interviewees had about the SOS was that they thought that people’s feelings about their work could change from day to day, which meant that there was an inherent variability in their responses when undertaking the SOS at any given point in time. They felt that their responses were a product of recent experiences, a reflection of contingent events which were a natural part of the job, for example, negative experiences such as a conflict with a student or being under particular work
pressure during report writing time. Interviewees also doubted the motivation of other staff when doing the SOS, though they believed they were honest themselves. They felt some people took advantage of the anonymity of response to be generally negative and have a go at the administration. A staff member also might have a grievance about one particular area of their work, but this negativity could influence their responses to all SOS questions. This made it difficult for schools to pin down genuine areas of concern which needed to be addressed and cast in doubt the SOS’s value in communicating attitudes reliably.

Other criticisms revolved around the format of the SOS. Interviewees thought that the SOS was too long, due to questions being repeated in a different form, which they found irritating. They also disliked negatively worded questions which they found confusing. Some interviewees queried the closed questions with set response options, lacking the opportunity to explain an answer, and there were concerns about questions being open to a range of interpretations, resulting in different responses. Other issues raised by interviewees included: having to answer on behalf of other staff, being required to lump people together such as school leadership, and a lack of qualification to answer some questions (mainly from SSOs and first-year teachers). Staff also had concerns regarding what was done with and about SOS data. Some interviewees indicated that their attitude towards the SOS meant they did not spend much time on it. They thought that the general level of application to the SOS was likely to be higher if the views contained in the results were going to be recognised and listened to by the school administration. Reservations about the SOS extended to those in leadership positions. Principals were mostly sceptical about the SOS and its usefulness because of perceived variability of response, both of the individual and of the group, and questions over the motivation of some staff when answering it. The assistant principal in school C felt that the SOS built a climate of mistrust and encouraged poor communication, with some people using it as an anonymous vehicle to express some complaint without thinking through their responses.

When asked about improvements to the SOS as a measure of organisational health, interviewees suggested that the SOS could be redesigned by the removal of perceived trick questions to make it shorter, by framing questions more positively, and by asking the respondents about themselves and not how the staff thought. They reflected that
schools could also use qualitative tools as alternatives or supplements to the SOS. These could involve outsiders coming into schools and talking to people by conducting interviews or focus groups, or getting the whole staff together to discuss organisational health. Interviewees felt such methods, though they might not always be practicable, would allow people more time to think about answers and would provide a better form of communication. Staff would be required to face up to and discuss perceived problems, and suggest potential solutions, giving more chance of resolving issues. In one school (school A) performance reviews were felt to be an effective diagnostic tool of this type.

THINKING BEHIND RESPONSE

Interviewees were given a series of stimulus words used in SOS questions on stress and morale and asked firstly, whether they thought the words belonged to stress or morale, or both stress and morale, and secondly, whether they belonged to individual or group, or both individual and group. When asked about stress and morale, most of the interviewees either interpreted the words as they were intended in the SOS or placed them in the category for both concepts. When asked to place words in either individual or group, the responses were less clear-cut. Some words were applied as in the SOS while others, such as depression and anxiety (both individual and group in the SOS), were perceived as individual characteristics, cheerfulness (individual) felt to apply to groups, and frustration (group) to individuals.

There were differences in the thought processes used by interviewees. Some answered immediately and definitely, others hesitated or deliberated more over their choices. The longer interviewees thought about their answers, the more difficulty they seemed to have in pinning down a response and, as they reflected on the relationship between the dimensions, the more likely they were to conclude that the concept applied to both stress and morale, or both individual and group. Their deliberations also led them to reappraise answers, reflect on their own personalities, and analyse how their workplaces operated.

In a separate question, interviewees were asked to define “good team spirit”, a concept used in an item from the staff morale dimension of the SOS. There was common understanding that the phrase reflected social characteristics such as unity and co-
operation, agreeing about team direction, and being willing to work together to achieve common goals. Good team spirit within the group was also thought to be characterised by qualities of sharing and openness, and feelings of trust and support, with team members being there to help each other when needed. Another associated element of team spirit was that tolerance and mutual respect extended throughout the group. Some interviewees directly associated good team spirit with high morale.

Interviewees also reflected on team spirit within their own school contexts. Team spirit was felt to be high in school A, present but less developed in school B, and more limited in school C. In the primary school in particular, good team spirit was thought to be one of the guiding principles of the school, as evidenced by the professional learning teams, the unified approach of staff, and the respect and support they showed for one another. Interviewees in the secondary school referred less to their own workplace, although those that did commented that staff generally worked well together and supported each other. Interviewees in the P-12 referred to divisions and conflict within the staff at different times, and a lack of unity and support for school goals amongst some staff.

CONSISTENCY OF RESPONSE

Most of the interviewees had undertaken the current year’s SOS at the time of interview. The great majority of these interviewees thought that if they were asked to do the SOS again, they would give the same or similar responses to the SOS they had just completed. When asked to compare their likely responses with those given in the previous year’s SOS, there was more variation. Half of the interviewees thought their responses would be similar, a quarter said their responses would be more positive, and the rest gave equivocal answers. Interviewees gave a range of reasons to justify the change in perceived response for better or worse, such as the school having moved on or altered in some way, or changes in personal life. A number of interviewees qualified their answers by noting that their responses would vary naturally over time depending on the influence of contextual events within the workplace. Interviewees new to teaching or to the school indicated that a lack of knowledge had probably affected some of their responses.
SUMMARY

This chapter has provided a summary of the research findings derived from the research instrument, semi-structured interviews of staff in three different schools. The areas covered were change factors, well-being, stress, morale and the SOS. The following chapter provides a discussion of these findings in the light of the literature.
CHAPTER SIX – DISCUSSION

This chapter discusses the significance of the research findings in the light of the research questions and of previous literature. The research questions are restated below:

Major research question:

How are the concepts of stress, morale and well-being constructed by staff in Victorian government schools and what role do such factors play in the organisational health of these schools?

Sub-questions:

(1) To what extent do staff perceive stress and morale as both group and individual phenomena?

(2) What contextual elements impact on responses to the Staff Opinion Survey?

The chapter describes the findings of the research which confirm previous literature, outlines those findings which vary from the literature or have not been previously highlighted, and outlines directions for future research. It suggests that staff perceive stress as having largely individual characteristics and morale as having both group and individual qualities. It describes perceptions of the SOS and argues that these perceptions reveal its limitations as a form of communication of staff organisational health. It also suggests that full understanding of operational health in any particular school context needs to include an awareness of the importance of emotions, and the beliefs with which they are associated. It recommends that quantitative methods of data collection relating to school organisational health, such as the SOS, should be supplemented by school-specific qualitative methods, and that school leaders develop a greater understanding of emotions and their management.
CONFIRMED FINDINGS

WELL-BEING

This research supported the construction of well-being as a representation of the overall health of an individual (Spector et al., 2001), incorporating all elements of life (physical, mental, emotional and social) and not restricted to work (Coon, 2001; Holmes, 2005; Masters, 2004), all operating at a high level and in harmony (Horstmanshof et al., 2008; Humphrey & Humphrey, 1986). It fitted with the view of subjective well-being as a combination of a judgement of global life satisfaction, together with positive and negative emotional components (Davern & Cummins, 2006; Diener, 1984; Horstmanshof et al., 2008). Definitions of well-being provided by interviewees focused on the job satisfaction element of life satisfaction, particularly wanting to come to work and enjoying being at work. Perceptions of the emotional aspects of well-being included references to positive feelings about all aspects of life, including high morale, and an absence of negative feelings, including experiences of stress. Interviewees emphasised the importance of reducing negative work experiences in maintaining well-being, particularly levels of work demands.

Staff clearly felt that the obligation for looking after their well-being lay with school administrations. Their views that their well-being would be enhanced by leadership valuing and acknowledging their efforts, and listening and responding to their concerns, highlight the importance of open communication and supportive leadership (APRG, 1990; Hall & George, 1990; Mathison & Freeman, 2006; Rogers, 2002) by organisational climate models such as those deriving from the OCDQ (Brown & Ralph, 1998; Freiberg, 1999; Hoy & Sabo, 1998) and the dimensions of the SOS. It seemed particularly important to staff that leadership showed empathetic understanding of the complex demands of their work. The potential conflict of individual well-being with school well-being needs, mentioned by some administrators, pointed to the wider organisational issue of individualism versus group cohesion.

The nature of well-being issues raised in the three schools emphasised the degree of contextual variation in schools as organisations (Evans, 1997a, 1997b, 1998; Nias, 1981; Nias et al., 1989). In the school with high morale (school A), leadership was felt to have a concern for the well-being of staff, and empathy for their needs, which
extended beyond the work environment. Even though work demands were still high, and part of the school’s ethos of achievement, individual staff well-being seemed to be buttressed by perceptions of high levels of support, assisted by good communication and teamwork. Levels of support were lower in the other two schools, associated with perceptions of a more directive leadership style (school B) or divisions within staff (school C), symptoms reflecting negative occupational well-being (Cotton, 2008). This provides weight for the views of Rogers (1992, 2002) and others (Bernard, 1990; Punch & Tuetteeman, 1996) regarding the importance of personal and professional support in mediating well-being experiences in schools.

In Hart’s (1994, 2000) organisational health model, following Bradburn (1969), stress (negative emotions) and morale (positive emotions) were theorised as independent dimensions contributing to well-being. Interviewees, who generally interpreted this issue in terms of individual experiences, mostly thought high stress and high morale could co-exist for a limited period but were not completely independent, connecting the two concepts within a complex of cognitive and environmental interactions. Interviewees felt morale was a more enduring, broader and socially-supported quality than stress, meaning an individual could feel stressed at times, but still maintain a positive outlook because the stress was under control, external or short-lived. They felt that severe or prolonged stress would overwhelm resources, resulting in an inability to cope, and eventually bringing down levels of morale. This inverse correlation of positive and negative emotions over time is in line with emotion theorists (Diener, 1984), but at odds with Hart’s organisational health model.

The implication of a broader understanding of stress to include eustress (Selye, 1976) by some interviewees, or elements of positive affect, perhaps also present in Hart’s (2000) references to stress as provoking a higher level of achievement, may help to explain research showing staff reporting high stress, but also high levels of job satisfaction (DE&T, 2004c; Fletcher & Payne, 1982; Kyriacou, 1987). When the debate is understood in terms of group morale and distress, changes in individual emotional states would tend to even out at any particular point in time, however, in practical terms it would seem unlikely that there would be very many schools where school distress and morale would be simultaneously high or low, either as measured by the SOS, or in commonsense understanding.
JOB SATISFACTION

Job satisfaction was thought by staff to be what made working in a school worthwhile and what motivated them to come to work, a construction implying the importance of individual needs and values, which is common to many definitions of this concept (Evans, 1997b; Herzberg, 1968; Locke, 1976; Schneider, 1975). The major source of job satisfaction for interviewees came from students, seeing their progress, and feeling that they had made an observable contribution to their development and well-being. These observations support research showing job satisfaction for teachers comes predominantly from the classroom and working with students (Evans, 1997a; Holmes, 2005; Hoyle, 1975a; Nias, 1981), and the sense of personal contribution to student achievement noted by Evans (1997a, 1998). The importance of the emotional connection between teachers and students in primary teaching (Nias, 1981) was particularly evident in school A. The comments of some school leaders regarding reduced job satisfaction due to being removed from contact with students, gives some support to the views of Beatty (2005), concerning the emotional alienation of school leaders, and highlights the tension between the nurturing side and the managerial constraints of administration (DE&T, 2004d).

The primary cause of job satisfaction as deriving from students fits into Herzberg’s motivation (rather than hygiene) and Evans’ job fulfilment (rather than job comfort) factors (Evans, 1997a, 1998; Herzberg, 1968), and higher-order psychological growth rather than lower-order needs (Maslow, 1954). This study agrees with Evans’ (1997a, 1997b, 1998, 2001) assertion that intrinsic factors contribute largely to teacher job satisfaction, and that extrinsic factors contribute to dissatisfaction. However, it also accepts the view of Nias (1981) that the distinction between the work itself and its context is not clear-cut in teaching, because the complexity of staff social interaction, as well as actual classroom teaching, seems to impact on work outcomes.

This investigation found evidence of a correlation between levels of job satisfaction and the degree of fit between an individual’s needs and values and actual job conditions (Conley & Muncey, 1999; Cox, 1978; Evans, 2001), or teacher “professionalism” (Evans, 1997a, 1998; Hoyle, 1975a). Job satisfaction was higher amongst staff who felt they were carrying out their educational goals, for example, addressing students’ well-being needs, and lower when there was a mismatch of attitudes and job conditions, for
example, unhappiness with school leadership or changes in curriculum. Job satisfaction also seemed to be higher amongst staff newer to teaching, contrary to some studies showing higher levels of job satisfaction in older teachers (Kyriacou & Sutcliffe, 1979b; Travers & Cooper, 1998).

STRESS
The reality of occupational stress was borne out by interviewees being able to readily understand and define stress, describe their own experiences of stress and identify stressors for staff. The findings support views of stress as a highly subjective phenomenon which is a significant factor in the lives of teachers (Bernard, 1990; Gold & Roth, 1993; Hart et al., 1995; Humphrey & Humphrey, 1986; Kyriacou, 1987). The subjectivity of stress was highlighted by its perceived impact varying considerably between interviewees, with a small number reporting the absence of stress, while others recounted highly personalised, major stressful episodes from the recent or more distant past. The occurrence and intensity of stress experienced in any given situation seemed to be strongly mediated by personal factors and the result of individual appraisal (Cox, 1978; Lazarus & Folkman, 1984).

Interviewees generally defined stress through its negative effects, or distress (Kyriacou & Sutcliffe, 1978a), supporting Humphrey and Humphrey (1986), who observed that teachers perceived few positive aspects of stress. References to stress as positive and productive, or eustress (Selye, 1976), made the qualification that this form of stress was only short-lived before becoming a negative, implying stress had a cause (demands or pressure) and a response (Patmore, 2006). Interviewees predominantly described stress as the experience of negative emotions such as anxiety and unhappiness, as commonly described and measured in teacher stress literature (Bernard, 1990; Cole & Walker, 1989; Hart & Cooper, 2001; Mathison & Freeman, 2006; Otto, 1986; Rogers, 1992), and as operationalised in the SOS. Interviewees also described physiological, behavioural and cognitive symptoms of stress, including beliefs of under-achievement and not meeting expectations, and reduced functioning at work (Bernard, 1990; Brown & Ralph, 1998). Interviewees’ descriptions of being overwhelmed by events, inability to cope, and powerlessness highlighted the importance of loss of control in perceptions of stress (Bernard, 1990; Kyriacou & Sutcliffe, 1979a; Travers & Cooper, 1998) and illustrated the ongoing process of appraisal and coping described in Lazarus and
Folkman (1984). Regaining a degree of control through reappraisal (Lazarus & Folkman, 1984) seemed important to staff in the experience of stress, as coping strategies were put in place to help manage events, even when the stressors themselves hadn’t changed.

Interviewees observed that stress impacted on all areas of their lives, resulting in abnormal reactions to life events and changes in social behaviour, such as the tendency to withdrawal, a noted reaction to prolonged stress (Gold & Roth, 1993; Travers & Cooper, 1998), and a symptom of burnout (Dworkin, 2001; Gold & Roth, 1993; Kyriacou, 1989; Otto, 1986), which, by reducing coping strategies such as support, can perpetuate and accentuate the experience of stress (Rogers, 2002). Interviewees described stressors as deriving from events at work or outside work, from one major event overwhelming coping resources or a cumulative build-up of more minor events or daily hassles (Lazarus & Folkman, 1984). The influence of factors beyond the work environment on stress levels of staff has implications for measures of organisational health such as the SOS.

Work-related stressors varied from school to school, indicating the importance of context and subjectivity (Kyriacou, 1987, 1998; Kyriacou & Sutcliffe, 1978b). The major stressor for staff, particularly in school B, was workload pressures and demands, supporting Kyriacou (1987) and Bernard (1990). However, there was also evidence to show that in a healthy organisation with high morale, as in school A, perceived work demands became less significant, as Hart (2000) suggested. References to administrative burdens, such as additional paperwork or extra meetings taking staff away from teaching students, indicated that staff connected stress with the reduction of job satisfaction and positive aspects of work, as well as an increase in its negative elements. Interviewees mentioned a range of problem and emotion-focused coping strategies (Lazarus & Folkman, 1984). Interviewees described how peer support and supportive leadership mediated experiences of stress (Punch & Tuetteman, 1996; Rogers, 1992, 2002) by acting as a form of reappraisal (Lazarus & Folkman, 1984), helping to put things in perspective, relieving pressure, and suggesting means of action.

In reference to the first research sub-question, stress was perceived as being highly subjective and individual. Interviewees described stress mostly in terms of their own
feelings, reactions and experiences, even when discussing stress in relation to other staff. This brings into question the nature of school distress in the SOS as a qualitatively different concept to that produced by the aggregation of individual distress. One obvious difference between the two dimensions is that constructions of individual distress are formed through self-report of personal emotional states, whereas judgements of school distress are formed through indirectly inferring emotional states of other staff from observed behaviour. SOS results in school C did seem to indicate that where a school had high levels of distress and low morale, these patterns were more strongly accentuated in self-reports than measures of group tone.

MORALE
In contrast to stress, interviewees perceived morale as having both individual and group characteristics with a number of different qualities. This supports research which focuses on morale as an individual predisposition or attitude (Doherty 1988; Evans, 1997b, 1998; Hart, 1994; Hart et al., 2000; Hart & Wearing, 1995), as well as the older view of morale as a group characteristic representing distinctive qualities of unity and cohesion (Coughlan, 1970; Guba, 1958; Locke, 1976; Smith, 1966, 1976, 1987). The separation of morale into two dimensions in the SOS was supported by these observations. High and low morale were qualitatively similar.

Interviewees equated high individual morale with positive emotions related to job satisfaction, such as wanting to come to work, enjoying work and feeling positive about it. High individual morale also meant feeling confident and in control of the work environment, experiencing a sense of achievement, and being prepared to “go the extra yard”. The willingness to expend extra energy has been part of definitions of group morale such as Guba (1958) and Coverdale (1975), while the sense of anticipation implied by wanting to come to work has formed part of theories of both individual and group morale (Coughlan, 1970; Evans 1997b, 1998; Smith, 1966). Individual morale was also perceived to have a social aspect, feeling valued and accepted by other staff, and in turn exhibiting attachment to the social group through tolerance and appreciation of its members (a characteristic of group morale). This construction of individual morale appears wider than the operationalisation of individual morale in the SOS as positive affect (enthusiasm, pride, cheerfulness, energy) (Hart, 1994, 2000).
Descriptions of group morale were characterised by a focus on elements of social affiliation and harmonious social interaction, such as group unity, goal congruence and cohesion, key elements of many definitions of morale (Coughlan, 1970; Doherty, 1988; Smith, 1966). High staff morale was underpinned by support, teamwork and communication, all elements of an open organisational climate (Hoy & Feldman, 1999; Hoy & Sabo, 1998). Emotional support in the form of mutual respect, tolerance and empathy seemed particularly important (Rogers, 1992, 2002). Both peer support and supportive leadership extended beyond circumscribed work roles into all aspects of social interaction, showing a concern both for the general well-being of individuals and the group as a whole. Such discretionary or prosocial behaviours, particularly evident in informal meeting places such as social staffrooms (Ben-Peretz et al., 1999; Nias et al., 1989), have been regarded as crucial to the success of an organisation (George, 1990; Hart & Cooper, 2001; Hart & Cotton, 2003; Moorman, 1991; Penner et al., 1997) by facilitating high levels of teamwork, team spirit and open communication. In contrast, interviewees thought that in a low morale staff, support, teamwork, unity and cohesion were much reduced, while divisions between staff were apparent and conflicts not resolved easily. Staff worked in a more restricted way and were generally less cooperative, tolerant and trusting. This construction of group morale seems broader than the staff morale dimension of the SOS (levels of team spirit, energy, enthusiasm and pride), but contains elements found in other dimensions of the SOS relating to goal congruence and professional interaction.

Descriptions of staff morale in the three schools reinforced morale definitions and emphasised contextual differences (Evans, 1998; Young, 1998). Morale was significantly higher in school A, where staff wanted to be at work and there was a strong sense of collective support, than in school B, where energy, cohesion and team spirit were lower, and in school C, where there were staff divisions and a lack of cohesion. Adaptability to change was a symptom of high morale (Dworkin, 2001; Mathison & Freeman, 2006) in school A, and resistance to change a cause of stress (Bernard, 1990; Kyriacou, 2001) and symptom of low morale in school C. The most notable feature of descriptions of morale was the significantly higher morale of primary teachers when compared to secondary teachers, confirming patterns evident in long-term, aggregated SOS data (DoE, 1998, 2007; Hart, 2000) and in other research (Rogers, 2002; Smith, 1987). This pattern was even evident in the P-12 school where
morale was rated much higher in the primary area according to all staff. Primary staff were regarded as having high levels of enthusiasm and energy, a unified and team-based approach, and a willingness to adopt new ideas; while the larger secondary staff were thought to be generally more divided, less collaborative and resistant to change. These observations correspond with Smith (1987), who attributed morale differences to greater co-operation and an increased sense of belonging in primary staff. Interviewees themselves commented that there were differences in personality, with the mostly female primary staff being more nurturers and carers, while the secondary staff were more diverse. Combining observations from all three schools, there seemed to be a greater match or fit between the values and expectations of primary teachers and organisational contexts. The close emotional attachment between staff and students in primary teaching, particularly evident in school A, seemed to enhance job satisfaction and increase morale, and to encourage the development of a less political environment amongst staff.

NEW FINDINGS
There are two areas of findings particular to this study, which both relate to the nature of communication within schools. The first refers to the impact of the SOS on staff, and the second concerns the importance of emotions in determining levels of school organisational health.

STAFF OPINION SURVEY
There has been little study of the impact of surveys such as the SOS on the people who undertake them. This research showed that though some staff were relatively satisfied with the SOS, others were highly critical, and most staff pointed out areas where it could be improved. In doing so, interviewees reflected on the SOS as a tool of communication and revealed the values which they held important and which motivated their behaviour. Staff wanted to reflect on their workplace and to give feedback about their organisation which they thought could improve it. The SOS gave the opportunity for this feedback, but many staff felt that the nature of this process and the quality of data which it produced were both flawed, and potentially harmful rather than beneficial to desired organisational health outcomes.
One of the premises behind any survey is that it is measuring a stable, objective reality which can be established from assessing the unbiased judgements of respondents (Foddy, 1993; Krosnick, 1996; Lincoln & Guba, 1985) and which therefore provides survey administrators with reliable information which can be analysed. Many interviewees questioned their own responses, the responses and motives of others, and the data which was generated. They understood the need to assure the anonymity and confidentiality of respondents, which protected the personal liberties of staff and encouraged a free and unconstrained response. However, they believed that the reduction of individual accountability militated against the trustworthiness of the data and was contrary to the model of open communication which schools should be encouraging. Administrators, in particular, thought that the SOS encouraged unconstructive criticism without taking on responsibility. They questioned the motivation and objectivity of a small number of respondents and therefore the reliability of SOS data.

Interviewees were concerned that they gave an accurate picture of how their organisation operated and believed that they answered the SOS honestly, but they did not trust their own responses. Their major criticism of the SOS implied that as a snapshot of school health at a single point in time, it could not capture the full complexity and dynamism of their school environment as they perceived it. In particular, they thought that their responses were not stable and might vary over time, depending on affective reactions to daily workplace events, such as instances of conflict with students or colleagues, what in the stress literature would be called hassles or uplifts (Lazarus & Folkman, 1984), particularly hassles. Administrators also found the data inherently unreliable, citing the influence of immediate contextual events on staff morale as a whole. By noting the influence of fluid emotional states on subjectivity of response, these perceptions bring into question the assumption that a survey such as the SOS assesses stable, objective evaluations of internal states and workplace behaviours. Research has shown that momentary affective states can influence judgements of well-being and recollections of past events and therefore that temporal reliability is an issue in the use of ratings scales (Diener, 1984).

A related belief of many interviewees was that strong emotions (especially a negative set) associated with an area of work about which a respondent felt deeply, such as
unhappiness with the principal, were likely to be generalised to all survey items, making it difficult to rely on data sub-sets in pinpointing issues of concern. These variations in short-term emotional states, together with differences in more stable personality characteristics and the use of responses as a means to express feelings of dissatisfaction, may go some way towards explaining the degree of variation within each school between individuals which has been observed in SOS data (Hart, 2000). When such judgements are aggregated, they tend to even out, which would account for the lower variation between organisations.

A number of interviewees felt that the usefulness of information which they were able to provide through the SOS was limited by its format. Closed questions restrict the way in which respondents can answer (Foddy, 1993; Krosnick, 1996) to enable responses to be compared. However, some staff felt that the use of rating scales prevented them from giving the level of explanation and necessary qualifications about their judgements which they believed were integral to the organisational dynamics which they were describing, to avoid misinterpretation by those analysing the data. A standardised survey also assumes “each question is understood in the same way by all respondents” (Foddy, 1993, p. 12). A number of interviewees commented about differences in interpretation affecting their responses. An associated problem was the perceived difficulty in answering on behalf of staff as a whole when respondents could only form a judgement of the colleagues with whom they worked closely. Some interviewees suggested they answered questions even when they felt they had insufficient knowledge on which to base a judgement (Foddy, 1993) because the question wording suggested they should do so (Krosnick, 1996). Others indicated they spent little time on the SOS, curtailing the effort required in making a complex cognitive judgement, what Krosnick (1996) described as “satisficing” rather than answering optimally. The overall tone of the SOS was thought to be negative, with questions that seemed to repeat themselves and negatively-phrased questions designed to “trick” respondents, implying they were not to be trusted, and a focus on negative experiences.

The administration of the SOS provided further concerns. Staff did not want their opinions to be taken for granted. They reacted strongly to any hint of manipulation, for example, being asked take into account the impact of poor SOS results on the school, because of what this implied about their professionalism. As part of good
communication and respect for their views, they expected access to SOS data, an opportunity to discuss the results, and to know what action had been taken as a consequence. Where this did not occur, it affected attitudes to doing the SOS and faith in school leadership.

School leaders voiced other reservations. They wanted to rely on the data which the SOS generated, to be sure that the areas which the SOS highlighted as weaknesses were indeed the ones they should be focusing on, but they did not always have this confidence. Although the SOS might highlight useful patterns, too often the data was problematic in interpretation. A comment which suggested that comparison against external school benchmarks was artificial, because in making relative judgements interviewees did not have sufficient knowledge of other environments, was supported by the fact that interviewees had spent an average of 13 years each in two of the schools (A and B). School leaders also felt that using the SOS as a key performance indicator of the school and their own performance ran counter to fostering a climate where leadership could make decisions which might have been unpopular, but benefited the school, and where constructive criticism was not seen as an automatic negative.

Suggestions about improving the SOS or providing alternatives to it echoed previous comments about communication. The interviewees wanted the SOS to be framed more constructively and to ask only about the respondents themselves and not their opinions of other staff. They suggested the SOS could be supplemented by individualised qualitative measures such as interviews, focus groups or full staff discussions. These would be subject to their own pitfalls, such as not being comparable across schools, but would encourage better communication amongst staff because issues would be discussed openly, putting the onus on them to address and resolve problems. The perceptions of the SOS as a form of communication where cognitive judgements are strongly influenced by affective factors imply the significance of emotions in the broader organisational environment.

THE ROLE OF EMOTIONS IN ORGANISATIONAL HEALTH
When considering the subjective perceptions of the various elements of staff organisational health and their relationships, the interviews revealed a complex, highly contextualised working world where individual differences, environmental influences
and social interaction all played major roles in influencing individual well-being and organisational outcomes. This research emphasised the role of social behaviours such as support, teamwork and communication in determining levels of staff organisational health, including raising morale and coping with distress. It suggested that these behaviours are dependent on the expression of positive emotions, such as empathy and altruism, and management of negative emotions, such as anger and anxiety, which together enable the reconciliation of different belief systems and experiences. It shows that emotions need to move from the periphery of school organisational health to its focus, to be recognised as a motivator of behaviour as well as an indicator of well-being.

The importance of managing emotions for individual teachers has already been well-recognised by stress management texts (Bernard, 1990; Gold & Roth, 1993; Hayes, 2006; Holmes, 2005; Mills, 1995), because of the “strong emotional ties” (Bernard, 1990, p. 2) which teachers form, which this research has emphasised. These texts highlight the need to reduce the intensity of emotional stress reactions, particularly anger, by teachers taking personal responsibility for their emotions and accepting the validity of the emotions of other people (Bernard, 1990). The power of emotions to influence behaviour has been underlined by advances in neurological research (Crowe, 2005; Goleman, 2004a) which have helped explain why sometimes “heat of intense emotion momentarily overpowers our ability to reason” (Lazarus, 1999, p. 99).

What is less appreciated is the important connection between emotions and cognition, that an emotional reaction represents the expression of a particular underlying belief, because “thoughts shape feelings and action” (Lazarus & Folkman, 1984, p. 350). Lazarus (1993, 1999) suggested that the way forward in the study of stress lies in research into the emotions, and the specific patterns associated with each emotional response. He argued that every emotion has an internal logic, which “depends on reason and follows clear rules” (1999, p. 86), which makes sense once personal goals, beliefs and situational intentions are established, even if not realistic. This irrational thinking, typified in unrealistic demands for success and approval, has been explored in cognitive therapies. Ellis (1999; see also: Bernard, 1986, 1990, 2000; Bernard & Di Giuseppe, 1989) described a causal chain in which often irrational beliefs were triggered by the appraisal of activating events and were followed by emotional consequences. His work
emphasised the possibility of changing self-defeating tendencies to emotions such as anger and anxiety and their associated behaviours by disputing and changing our underlying beliefs (Ellis, 1999).

At an organisational level, the importance of the emotions in influencing behaviour, and the nexus between emotions and cognition, has received less attention. This research supports Beatty (2005, 2007) who argued that understanding and managing emotions is crucial to educational leadership, because emotions “are present in everything we do” (2005, p. 122). She believed that the “emotional silence” (2007, p. 331) of the managerial approach to leadership, by concealing emotions, threatens social connectedness. Beatty argued that leaders need to recognise and reconcile their emotional selves, and to make emotions explicit in professional discourse. This would lessen their grip on control, but remove the major obstacle to the formation of true learning communities (Beatty, 2005, 2007).

The managerial approach to school leadership has been described as producing a more directive and controlled environment, where accountability is a one-way process and there is a “reduction in time and space in schools for informal sharing of teacher experiences” (O’Brien & Down, 2002, p. 129) and a lowering of job satisfaction. Of the three schools studied in this research, the managerial approach seemed to be typified in school B, where staff expressed dissatisfaction at a principal who, despite having made necessary reforms, discouraged dissenting views and increased work demands by filling teachers’ time with meetings, restricting their professional independence. Some staff drew the conclusions that their opinions were not respected and that they were not to be trusted. Their reactions pointed to a gap between the values and beliefs of leadership and staff which seemed to be impacting on organisational behaviour and outcomes.

School A, in contrast, seemed much closer to the ideal learning community envisaged by Beatty (2005, 2007); a school with high morale where the views of leadership and staff were more in harmony and supportive behaviours were prominent. Positive emotions far outweighed negative emotions and both were freely expressed and managed, as seems easier to achieve in primary schools. But even in this school, the importance of the “emotional aspects” (Bernard, 1990, p. 256) of messages was shown in the reaction of many interviewees to the implication that their SOS responses were
being manipulated by the principal, representing a difference in mindset which needed to be understood.

In contrast in school C, internal divisions were clearly evident in the strongly emotional reactions of some staff to issues such as curriculum reform and the tendency towards individualism of some staff. Supportive and co-operative behaviours rely on people’s sense of being treated fairly (Moorman, 1991), and in this school a number of staff clearly believed that they were not being treated fairly. The leadership of the school had encouraged the expression of these emotions, for example, through discussion of SOS results, but had not succeeded in confronting or dealing with their underlying beliefs and associated forms of behaviour, which were clearly hampering school progress.

Emotions are particularly powerful in human communication because they help to transmit and identify messages about what is felt most acutely (Lazarus, 1999). In a social environment, such as a school, emotions strongly influence behaviour. These expressions need to be both expressed and dealt with. If not allowed to be expressed, as in school B, then “subcultural factions of resistance” (Beatty, 2007, p. 331) will undermine plans for improvement. If not dealt with, as in school C, then the lack of reconciliation of belief systems will prevent the degree of unity, teamwork and co-operative behaviour necessary to maximise organisational outcomes. These outcomes rely on fostering positive emotions, such as empathy and altruism, evident in the experiences of job satisfaction and high morale, which are crucial in developing trust between staff and loyalty to the school and its goals.

**FUTURE RESEARCH DIRECTIONS**

Further research needs to take place in a number of directions. The role of personality in determining experiences of stress has been widely noted through its role in appraisal, and influence on coping strategies (Cotton, 1995; Ford, 2004; Hart & Cooper, 2001; Hart et al., 1995; Hart & Wearing, 1995; Travers & Cooper, 1998), in particular, a positive correlation with neuroticism and a negative correlation with extraversion. This investigation indicated that staff displayed a range of personality characteristics, but did not address this issue in sufficient detail to draw firm conclusions. Further study of the
relationship between personality and experiences of stress in teachers would be beneficial.

Schools need to be assisted to develop their own qualitative research processes to accompany standardised measures such as the SOS, to provide the degree of contextual detail and complexity which the SOS lacks. Research processes using interviews or focus groups have their own drawbacks, such as a lack of comparability and issues concerning anonymity and confidentiality. However, they can provide rich and individualised data with more contextual meaning, as well as providing staff with a valuable avenue of communication which will impact positively on their work-related attitudes. Schools could make use of various approaches to program evaluation as described by Owen and Rogers (1999), including development of program logic and consultation of stakeholders.

The role of emotions in determining the attitudes and behaviour of both individuals and groups of staff in schools needs to be further investigated and understood, in particular, in supportive behaviours which seem significant in maintaining morale and assisting individual resilience, and negative behaviours which undermine group unity. There should be a greater focus on the dynamics of the staff group as a whole and its various sub-groups, the formal and informal teams which are influential in organisational success, and on managing the emotions of staff to achieve organisational goals. One particular area of organisational health which requires further investigation is identifying reasons behind differences in staff morale between primary and secondary schools.

**CONCLUSION**

The findings have identified a range of factors acting to maintain levels of staff organisational health in schools, particularly those involving teamwork, communication and support. These factors seem to be maximised where co-operation extends into all social interaction, as group members look after the well-being of others and submerge the culture of individualism for the sake of group goals. These successful learning communities are ones in which emotions are able to be expressed, and where these emotions and their underlying beliefs have been reconciled with the culture of the
school. Real unity of thought and behaviour requires modelling and promoting values of empathy, respect, trust and tolerance, something which cannot be achieved without listening to staff and responding to their needs. An important step in this process is the development of qualitative processes of organisational health which will capture some of the dynamic complexity of schools and the people who work in them, and allow their voices to be properly heard.
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## APPENDICES

### APPENDIX A: STAFF OPINION SURVEY


<table>
<thead>
<tr>
<th>Dimension</th>
<th>Individual questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual morale</td>
<td>(How do you feel about your job?)</td>
</tr>
<tr>
<td></td>
<td>Feeling positive at school</td>
</tr>
<tr>
<td></td>
<td>Feeling enthusiastic at school</td>
</tr>
<tr>
<td></td>
<td>Feeling proud at school</td>
</tr>
<tr>
<td></td>
<td>Feeling cheerful at school</td>
</tr>
<tr>
<td></td>
<td>Feeling energised at school</td>
</tr>
<tr>
<td>School morale</td>
<td>There is a good team spirit in this school.</td>
</tr>
<tr>
<td></td>
<td>There is a lot of energy in this school.</td>
</tr>
<tr>
<td></td>
<td>The morale in this school is high.</td>
</tr>
<tr>
<td></td>
<td>Staff go about their work with enthusiasm.</td>
</tr>
<tr>
<td></td>
<td>Staff take pride in this school</td>
</tr>
<tr>
<td>Supportive leadership</td>
<td>Staff are able to approach the school’s leaders to discuss concerns and grievances.</td>
</tr>
<tr>
<td></td>
<td>The school’s leaders don’t really know the problems faced by staff.</td>
</tr>
<tr>
<td></td>
<td>There is support from the leaders in this school.</td>
</tr>
<tr>
<td></td>
<td>There is good communication between staff and leaders in this school.</td>
</tr>
<tr>
<td></td>
<td>The leaders in this school can be relied upon when things get tough.</td>
</tr>
<tr>
<td>Role clarity</td>
<td>I am always clear about what others at school expect of me.</td>
</tr>
<tr>
<td></td>
<td>My work objectives are always well defined.</td>
</tr>
<tr>
<td></td>
<td>I always know how much authority I have in this school</td>
</tr>
<tr>
<td></td>
<td>I am clear about my professional responsibilities.</td>
</tr>
<tr>
<td>Professional interaction</td>
<td>I feel accepted by other staff in this school.</td>
</tr>
<tr>
<td></td>
<td>I have the opportunity to be involved in cooperative work with other members of staff.</td>
</tr>
<tr>
<td></td>
<td>There is good communication between groups in this school.</td>
</tr>
<tr>
<td></td>
<td>Staff in this school can rely on their colleagues for support and assistance when needed.</td>
</tr>
<tr>
<td></td>
<td>Staff frequently discuss and share teaching methods and strategies with each other.</td>
</tr>
<tr>
<td></td>
<td>There is good communication between staff in this school.</td>
</tr>
<tr>
<td></td>
<td>I receive support from my colleagues.</td>
</tr>
<tr>
<td>Participative decision-making</td>
<td>There are forums in this school where I can express my views and opinions.</td>
</tr>
<tr>
<td></td>
<td>I am happy with the decision-making processes used in this school.</td>
</tr>
<tr>
<td></td>
<td>Staff are frequently asked to participate in the decisions concerning administrative policies and procedures in this school</td>
</tr>
<tr>
<td></td>
<td>There is opportunity for staff to participate in school policy and decision-making.</td>
</tr>
<tr>
<td>Goal congruence</td>
<td>The staff are committed to the school’s goals and values.</td>
</tr>
<tr>
<td></td>
<td>The goals of this school are not easily understood.</td>
</tr>
<tr>
<td></td>
<td>The school has a clearly stated set of objectives and goals.</td>
</tr>
<tr>
<td></td>
<td>My personal goals are in agreement with the goals of this school.</td>
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<tr>
<td></td>
<td>There is agreement about the teaching philosophy of this school.</td>
</tr>
<tr>
<td>Appraisal and recognition</td>
<td>I am encouraged in my work by praise, thanks or other recognition</td>
</tr>
<tr>
<td></td>
<td>I have the opportunity to discuss and receive feedback on my work performance.</td>
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<tr>
<td></td>
<td>I am regularly given feedback on how I am performing my role.</td>
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<tr>
<td>Category</td>
<td>Description</td>
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<td>----------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
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<tr>
<td>Professional growth</td>
<td>I am happy with the quality of feedback I receive on my work performance.</td>
</tr>
<tr>
<td></td>
<td>Staff receive recognition for good work.</td>
</tr>
<tr>
<td>Others in this school take an active</td>
<td>The professional development planning in this school takes into account</td>
</tr>
<tr>
<td>interest in my career development and</td>
<td>my individual needs and interests.</td>
</tr>
<tr>
<td>professional growth.</td>
<td>There are opportunities in this school for developing new skills.</td>
</tr>
<tr>
<td></td>
<td>It is not difficult to gain access to inservice courses.</td>
</tr>
<tr>
<td>Curriculum coordination</td>
<td>There is sufficient contact between different sections of the school in</td>
</tr>
<tr>
<td></td>
<td>curriculum planning.</td>
</tr>
<tr>
<td></td>
<td>The curriculum in this school is well-planned.</td>
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<td></td>
<td>There are structures and processes in this school which enable staff to</td>
</tr>
<tr>
<td></td>
<td>be involved in curriculum planning.</td>
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<tr>
<td>Effective discipline Policy</td>
<td>There is an agreed philosophy on discipline in the school.</td>
</tr>
<tr>
<td></td>
<td>My own expectations about discipline are the same as most other staff at</td>
</tr>
<tr>
<td></td>
<td>this school.</td>
</tr>
<tr>
<td></td>
<td>The rules and sanctions relating to discipline in this school are well</td>
</tr>
<tr>
<td></td>
<td>understood by staff and students.</td>
</tr>
<tr>
<td></td>
<td>The rules and sanctions relating to discipline are not enforced in a</td>
</tr>
<tr>
<td></td>
<td>consistent fashion in this school.</td>
</tr>
<tr>
<td>Student orientation</td>
<td>Students are treated as responsible people in this school.</td>
</tr>
<tr>
<td></td>
<td>This school promotes the concept of students being individuals.</td>
</tr>
<tr>
<td></td>
<td>Students in this school are encouraged to experience success.</td>
</tr>
<tr>
<td>Student motivation</td>
<td>Students at this school are really motivated to learn.</td>
</tr>
<tr>
<td></td>
<td>Students at this school spend most of their time on task.</td>
</tr>
<tr>
<td></td>
<td>Doing well is important to the students at this school.</td>
</tr>
<tr>
<td></td>
<td>Students at this school put a lot of effort into their work.</td>
</tr>
<tr>
<td>Student decision-making</td>
<td>Students at this school are really motivated to learn.</td>
</tr>
<tr>
<td></td>
<td>Students are always keen to do well at this school.</td>
</tr>
<tr>
<td></td>
<td>Students at this school spend most of their time on task.</td>
</tr>
<tr>
<td></td>
<td>Doing well is important to the students at this school.</td>
</tr>
<tr>
<td></td>
<td>Students at this school put a lot of effort into their work.</td>
</tr>
<tr>
<td>Learning environment</td>
<td>Staff at this school have created an environment that promotes excellence</td>
</tr>
<tr>
<td></td>
<td>in the school’s teaching and learning practices.</td>
</tr>
<tr>
<td></td>
<td>Staff at this school have created an environment that maximises the</td>
</tr>
<tr>
<td></td>
<td>learning outcomes for students.</td>
</tr>
<tr>
<td></td>
<td>Staff at this school always focus on improving the quality of the school’s</td>
</tr>
<tr>
<td></td>
<td>teaching and learning practices.</td>
</tr>
<tr>
<td></td>
<td>Staff at this school always challenge each other to improve the quality of</td>
</tr>
<tr>
<td></td>
<td>the school’s teaching and learning practices.</td>
</tr>
<tr>
<td>Student misbehaviour</td>
<td>The behaviour of students in this school is poor.</td>
</tr>
<tr>
<td></td>
<td>Students who do not want to learn are a problem in this school.</td>
</tr>
<tr>
<td></td>
<td>Students are generally well-behaved in this school.</td>
</tr>
<tr>
<td>Classroom misbehaviour</td>
<td>Thinking of the class you teach most frequently, what amount of class time</td>
</tr>
<tr>
<td></td>
<td>(as a percentage) do you spend on student misbehaviour?</td>
</tr>
<tr>
<td>Excessive work demands</td>
<td>There is too much expected of staff in this school.</td>
</tr>
<tr>
<td></td>
<td>Staff are overloaded with work in this school.</td>
</tr>
<tr>
<td></td>
<td>There is no time for staff to relax in this school.</td>
</tr>
<tr>
<td>Individual distress</td>
<td>(How do you feel about your job?)</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>- Feeling tense at school</td>
<td></td>
</tr>
<tr>
<td>- Feeling anxious at school</td>
<td></td>
</tr>
<tr>
<td>- Feeling negative at school</td>
<td></td>
</tr>
<tr>
<td>- Feeling uneasy at school</td>
<td></td>
</tr>
<tr>
<td>- Feeling depressed at school</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>School distress</th>
<th>Staff in this school experience a lot of stress.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Staff in this school are frustrated with their job.</td>
</tr>
<tr>
<td></td>
<td>Staff in this school feel anxious about their work.</td>
</tr>
<tr>
<td></td>
<td>Staff in this school feel depressed about their job.</td>
</tr>
<tr>
<td></td>
<td>There is a lot of tension in this school.</td>
</tr>
</tbody>
</table>
No. of respondents who answered 50% or more of the survey questions: 31
Response Rate: 75.6%
School means plotted on PRI/SEC SCHOOL state benchmarks, 2005

School means plotted as percentage ranks against PRI/SEC SCHOOLS, 2005

Four Key Elements: average percentage ranks

Empathy Percentile Rank: 19%
Clarity Percentile Rank: 19%
Learning Percentile Rank: 30%
Engagement Percentile Rank: 28%

Notes: This report contains aggregated data from all three versions (Teacher, Non-Teacher and Principal) of the School Organisational Health Questionnaire.

Advice on how to interpret this report can be obtained from your SEO or at: www.soffweb.vic.edu.au/standards/improve/schoolonline.htm

* The higher the school mean, the more positive the outcome for variables 1 to 15. The lower the school mean, the more positive the outcome for variables 16 to 20.

** The higher the percentage rank, the more positive the outcome for all variables, 1 to 20.
APPENDIX B: ETHICS MATERIALS

B1: LETTER TO PRINCIPALS

October 11, 2005

Dear Sir/Madam

I am writing to you to request the involvement of your school, and staff in your school, in my research into the construction of stress, morale and well-being amongst teachers in Victorian schools (see attached Plain Language Statement and Participant Consent Form). The research is being undertaken as part of a Doctor of Education degree at the University of Melbourne, supervised by Dr David Gurr, and has been approved by the Department of Education and Training. The research will involve conducting individual interviews lasting approximately 45-50 minutes with ten to twelve teachers, as well as yourself, at a mutually convenient time and location. The information obtained will remain confidential, subject to legal requirements, and all identifying features (including those referring to the identity of the school, of the interviewee, and of individuals mentioned in interviews) will be removed during data analysis. Interviewees will be requested for permission to audio-tape interviews to enable accurate transcription of information.

Subject to approval for the school’s involvement in this research, I further request access to a list of teaching staff in order to select potential participants to be approached (participation will be entirely voluntary) so they can be contacted via the school. I would appreciate it if you would complete and return the school involvement consent form attached. Please contact me if you have any questions about this research.

Yours faithfully,

Michael Sturmfels
B2: SCHOOL CONSENT FORM

PROJECT TITLE:

‘Stress, morale and well-being as constructed by teachers in Victorian Government schools and their impact on school organisational health’

Name of school: ____________________________
Name of Principal: ____________________________
Name of investigator(s): Michael Sturmfels (Student researcher), Dr David Gurr (Supervisor)

Consent for school participation

Signature ______________ Date ______________
(Principal)

Permission to access list of teaching staff and contact details for purposes of this research

Signature ______________ Date ______________
(Principal)
Dear Staff member

I am writing to you to request your involvement in my research into the construction of stress, morale and well-being amongst teachers in Victorian schools (see attached Plain Language Statement and Participant Consent Form). The research is being undertaken as part of a Doctor of Education degree at the University of Melbourne, supervised by Dr David Gurr, and has been approved by the Department of Education and Training and by your school Principal, who has enabled access to staff contact details. Participation in the research is entirely voluntary.

The research will involve an individual interview lasting approximately 45-50 minutes, at a time and place convenient to you. The information obtained will remain confidential, subject to legal requirements, and all identifying features (including those referring to the identity of the school, of the interviewee, and of individuals mentioned in interviews) will be removed during data analysis. I am asking for permission to audio-tape interviews to enable an accurate record of interviews to be made. You will have the opportunity to check and comment on this transcript.

If you are willing to participate I would appreciate it if you would complete and return the participant consent form attached. Please contact me if you have any questions or require further information about this research.

Yours faithfully,

Michael Sturmfels
B4: PLAIN LANGUAGE STATEMENT

PROJECT TITLE:

‘Stress, morale and well-being as constructed by teachers in Victorian Government schools and their impact on school organisational health’

Principal Investigators: Michael Sturmfels (Student Researcher)  
Dr David Gurr (Supervisor)

This project is for purposes of research only and is undertaken as part of the requirements of a Doctor of Education degree at the University of Melbourne.

Research Summary
The negative and positive impacts of stress and morale both on individual teacher well-being and on the organisational health of schools have been long recognised but are not fully understood. The major tool currently used for measuring levels of well-being amongst teachers in Victorian Government schools is the annual staff opinion survey which, by using a series of standard questions and pre-set response categories, enables the school to compare itself against system-wide ‘benchmarks’ of organisational health.

My research aims to build a more in-depth picture of stress, morale and well-being in specific contexts than is available through such a broad-scale survey. It will examine these concepts as they are experienced by teachers in a small number of schools, investigating the different ways in which teachers interpret them and how this impacts on the organisational health of these schools. It will use as a starting-point the current staff opinion survey, and, in particular the thinking behind responses to questions relating to stress and morale.

The research involves comparative case studies of teachers in three schools based on different organisational models: primary, secondary and P-12. The case studies will be undertaken one at a time. Each case study will use as its major research method individual interviews of ten to twelve teachers, as well as the Principal. Potential participants will be randomly selected from a staff list supplied by each school (subject to Department of Education and Training and individual school approval) from which contact details will be obtained.

Participant Involvement
You will be asked to take part in an individual interview lasting around 45-50 minutes, answering questions relating to your experiences of stress, morale and well-being. Involvement in the project is voluntary; you are free to withdraw consent at any time, and to withdraw any unprocessed data previously supplied. The interview will take place in a private location convenient to you. Permission will be requested to audio-tape the interview in order to assist in producing an accurate record. You will be given the opportunity to check and comment on the interview transcript.

You should be aware that the small sample size may have implications for privacy/anonymity. Anonymity will be protected in the analysis and reporting of research through the substitution of pseudonyms (substitute names) for all institutions,
participants and other individuals, locations or other identifying features mentioned in interview data. Information collected will remain confidential, subject to legal limitations. The data will be kept securely by the researchers for five years from the date of publication, before being destroyed.

Once the thesis arising from this research has been completed, a brief summary of the findings will be provided to each school participating in this study, so that you have access to it.

For further information on the Project please contact:

Michael Sturmfels  
Email: msturmfels@pgrad.unimelb.edu.au

Dr David Gurr  
E-mail: d.gurr@unimelb.edu.au

If participants have any concerns about the conduct of this research project they should contact the Executive Officer, Human Research Ethics, The University of Melbourne, ph: 8344 2073; fax 9347 6739


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B5: PARTICIPANT CONSENT FORM

PROJECT TITLE:

‘Stress, morale and well-being as constructed by teachers in Victorian Government schools and their impact on school organisational health’

Name of participant: 
Name of investigator(s): Michael Sturmfels (Student researcher), Dr David Gurr (Supervisor)

1. I consent to participate in the project named above, the particulars of which - including details of the interview questions - have been explained to me. A written copy of the information has been given to me to keep.

2. I authorise the researcher to use with me the interview questions referred to under (1) above.

3. I acknowledge that:
   (a) The possible effects of the interview have been explained to me to my satisfaction;
   (b) I have been informed that I am free to withdraw from the project at any time without explanation or prejudice and to withdraw any unprocessed data previously supplied;
   (c) The project is for the purpose of research
   (d) I have been informed that the confidentiality of the information I provide will be safeguarded subject to any legal requirements.
   (e) Copies of transcripts will be given to me for verification
   (f) The small sample size may have implications for privacy/anonymity
   (g) Participants will be referred to by pseudonym in any publications arising from the research
   (h) The interview will be audio-taped (subject to my consent)

General Consent

Signature Date
(Participant)

Permission to audio-tape

Signature Date
(Participant)

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## APPENDIX C: INTERVIEWS

### C1: CHANGES IN SCHEDULE QUESTION WORDING

<table>
<thead>
<tr>
<th>School A (CS 1)</th>
<th>School B (CS 2)</th>
<th>School C (CS 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q 3. (If you have taught in other schools) can you describe these experiences for me?</td>
<td>[Unchanged]</td>
<td>Q 3. (If you have taught recently in other schools) how do they compare to this one? [Question altered]</td>
</tr>
<tr>
<td>Q 4. Has this school changed over the period you have been in it? If so, in what ways?</td>
<td>[Unchanged]</td>
<td>Q 4. Has this school changed over the period you have been in it? If so, in what ways? (e.g. students, staff, leadership) [Question extended]</td>
</tr>
<tr>
<td>Q 12. When people talk about the levels of morale of an individual or group as being ‘high’ or ‘low’, what do you think they mean by this?</td>
<td>[Unchanged]</td>
<td>Q 12. When people talk about the levels of morale of an individual or group as being ‘high’ what do you think they mean by this? And low morale? [Question altered]</td>
</tr>
<tr>
<td>Q 13. How would you describe morale amongst the staff in this school? (Please explain)</td>
<td>[Unchanged]</td>
<td>Q 13. How would you describe morale amongst the staff in this school? (Please explain). Are there differences between primary and secondary staff? [Question extended]</td>
</tr>
<tr>
<td>Q 16. Can you tell me if you completed the most recent staff opinion survey? (It required you to log into a website). If not, would you mind telling me why not?</td>
<td>Q 16. Can you tell me if you completed the last Staff Opinion Survey? If not, would you mind telling me why not? [Question shortened]</td>
<td>Q 16. Can you tell me if you completed the last Staff Opinion Survey? (If not, would you mind telling me why not?) What information were you given before the Survey? Were the results of the previous Survey discussed? [Question extended]</td>
</tr>
<tr>
<td>Q 17. If you completed surveys when they were paper-based (2003 and before), do you remember how they were administered? Is the web-based version preferable?</td>
<td>Q 17. What do you remember about doing the Survey? Did you find doing it a positive experience? [Question altered]</td>
<td>[Unchanged]</td>
</tr>
<tr>
<td>Q 22. Finally, if I asked you to do the staff opinion survey again, do you think you would give the same responses as on the last occasion?</td>
<td>[Unchanged]</td>
<td>Q 22. Finally, if I asked you to do the Staff Opinion Survey again, do you think you would give the same responses as on the last occasion? Would they be same as last year? [Question extended]</td>
</tr>
</tbody>
</table>
1. When did you take up the Principal position here?
2. How would you describe the school culture when you came?
3. What changes have you made since then?
4. How have you gone about making these changes?
5. What opposition did you get and how did you deal with it?
6. How would you describe the organisational health of the school now?
7. What still needs to be done to improve this further? (Current initiatives you are involved in)
8. Do you experience stress in your workplace and how do you deal with it?
9. What are the major causes of stress for staff in this school?
10. What does job satisfaction mean to you?
11. How would you rate staff morale?
12. Is it possible to have high stress and high morale at the same time?)
13. How useful is the Staff Opinion Survey? What reservations do you have about the results?
14. Are there better alternatives?
15. Why did you include the Leadership section of the Survey?
October 2, 2006

Dear _____________

Thank you for your participation in an interview as part of my research into staff well-being, stress and morale. I attach a transcript of the interview for your approval.

Please note that after approval and before the data is used for analysis, your anonymity will be protected by the substitution of pseudonyms for all institutions, participants and other individuals, locations or other identifying features mentioned in interview data.

Please feel free to make any amendments or comments about the interview on the feedback sheet which I have included, along with an addressed envelope, or by contacting me directly. If a response is not received by Monday, October 30, it will be assumed that permission is given to use the transcript in its present form.

The symbol [  ] has been used in the interview transcript to indicate points in the interview where meaning has not been clearly established. Thank you once again for your involvement in my research.

Yours sincerely,

Michael Sturmfels
C4: INTERVIEW FEEDBACK SHEET

Name of Interviewee ___________________

Specific comments/corrections (please indicate page numbers):

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Overall comments:

__________________________________________________________________________
__________________________________________________________________________

Signed _______________  Date ______

(Please return in the envelope provided, by Monday, October 30)
## C5: INTERVIEW FEEDBACK SHEETS RETURNED

<table>
<thead>
<tr>
<th>Interviewee</th>
<th>Specific comments</th>
<th>Overall comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>LT/A1</td>
<td>-</td>
<td>Gave staff the opportunity to reflect on current practices, staff welfare etc.</td>
</tr>
<tr>
<td>T/A1</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>T/A2</td>
<td>-</td>
<td>Good luck! I’ve got to stop saying “yeah”.</td>
</tr>
<tr>
<td>T/A3</td>
<td>[One transcription query]</td>
<td>I really enjoyed meeting you and the interview process. Good luck with your further work on this project. I look forward to seeing the end result.</td>
</tr>
<tr>
<td>S/A1</td>
<td>[Added comment re job security as a source of stress]</td>
<td>How many times can one person say yep? I can’t believe I couldn’t even string two sentences together. Good luck with your research.</td>
</tr>
<tr>
<td>LT/A2</td>
<td>It is interesting to read back word for word what I said. I sound like I need speech therapy! Nevertheless, the script is a very honest indication about how I feel.</td>
<td>Thank you for allowing me to be a part of your case study. Reading the script made me think a little about how I sound when I speak. Good luck with the rest of your research.</td>
</tr>
<tr>
<td>P/A</td>
<td>-</td>
<td>Seems fine. Hard to remember verbatim an interview, but I am happy that my views and thoughts are accurately recorded.</td>
</tr>
<tr>
<td>S/A2</td>
<td>[Separate letter and additional page of comments on well-being, stress and job]</td>
<td>-</td>
</tr>
<tr>
<td>T/B2</td>
<td>“Overall seems fine to me though I’m a bit horrified that I say “yeah” way too much”. “Many thanks for the opportunity to relieve some stress by talking about the issues with you”.</td>
<td>-</td>
</tr>
<tr>
<td>S/B</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>P/B</td>
<td>-</td>
<td>My apologies for the rambling inarticulate comments – must have had a late night prior</td>
</tr>
<tr>
<td>LT/C1</td>
<td>-</td>
<td>Do I really speak like that? I’m glad I didn’t have to transcribe it.</td>
</tr>
<tr>
<td>LT/C2</td>
<td>Very strange reading your ideas, thoughts from the transcript. At times thoughts wander but I hope my educational philosophy and intent come through. [One transcription query]</td>
<td>-</td>
</tr>
<tr>
<td>T/C4</td>
<td>All good!</td>
<td>Well done</td>
</tr>
<tr>
<td>T/C5</td>
<td>-</td>
<td>This looks fine to me. I had no idea I said “yeah” so much!</td>
</tr>
<tr>
<td>LT/C4</td>
<td>[Four transcription queries]</td>
<td>Didn’t realise I rambled so much! But I believe you can gain the meaning accurately from the rambles. Good luck, trust your study goes well.</td>
</tr>
</tbody>
</table>
APPENDIX D: REPORTS TO SCHOOLS

D1: REPORT TO SCHOOL A

The Case Study School
This was an essentially ‘high morale’ school as perceived by the people who worked in it, a ‘happy’ place to be in with staff reporting a high level of job satisfaction. The school was characterised by teamwork, good communication, and a high proportion of younger staff providing enthusiasm and new ideas.

At the same time the school was undergoing significant change due to a recent rapid rise in enrolments resulting from demographic changes. The growth of the school had changed the student and staff profile, and posed clear challenges to maintaining the school’s success. Interviewees commented that a larger staff meant people had to work harder for communication in order to make sure that everybody was on board as some staff still worked as if it was a small school. The increase in school size had placed added pressure on the core leadership group and highlighted the need for succession planning. A small number of staff, many close to retirement, carried the key knowledge, and some were perceived as being unwilling to hand on responsibilities and train up younger staff.

Once located in a rural setting, now effectively part of a suburb of a regional city, there had been changes in student behaviour in the school. More students were prone to physical and verbal outbursts, leading to greater teacher stress and the development of student well-being programs. Parent attitudes had also altered, with a relative decrease in involvement and support and the physical environment had changed, with less room for playground equipment. Yet staff still felt that it had many of the characteristics of a country school, with ‘a real feeling of community and belonging’.

The high morale of the staff as a group could be recognised by the ‘upbeat’ feeling in the school showing that staff generally enjoyed coming to work and felt the school ‘a good place to be’. Interviewees referred to the positive atmosphere in the staffroom, where there was lots of chatter, no ‘ownership’ of seats or coffee cups, people got along with one another and mixed well, and newcomers were readily accepted and made to feel comfortable. There was an open climate in the school as people worked co-operatively and were willing to share ideas and resources. A crucial element was that though they might have their own opinions, everyone respected one another and had a common direction based on the welfare of the students. This was contrasted with the atmosphere of a low morale school which some staff had experienced, where there were obvious factions, lack of acceptance, hoarding of resources, poor communication and negative staff members.

Three particular interrelated characteristics seemed to underpin high morale levels: support, teamwork and open communication. Staff remarked on the good camaraderie in the school and the way people supported each other ‘professionally and personally’. Classroom teachers particularly valued the close-knit teaching teams (from three to five teachers at each class level). The emphasis on teamwork and sharing meant that a particular problem was not the responsibility or ‘fault’ of
one person but a common issue for all, and easy to deal with if the team trusted each other. ‘Team spirit’, working together for a common goal was closely identified with morale. The teamwork and support in the school extended to people being ‘willing to go that extra yard to help out their colleagues’. The concern for the well-being of all staff was enhanced by open communication across the school which extended to the leadership. Staff felt that everyone was approachable and that communication was continuous, ‘consistent and ongoing’.

When questioned whether their level of individual morale matched that of the group, the answer was generally ‘yes’ but individual morale was perceived as being relatively more volatile than group morale. This variation was often attributed to personal rather than work stressors and tended to even out across the staff: when one individual was temporarily ‘down’, this was compensated for by the high morale of the rest of the group. Morale generally seemed an enduring quality not necessarily present in understandings of stress. It was noted, however, that cracks in morale could be infectious; a teacher who was upset or had a consistently negative attitude could affect the mood of the whole staff.

There was a much greater variation in subjective experiences of stress, although some commonality in how it was constructed. Some interviewees said they hadn’t been ‘stressed’ themselves but had seen it in others, whereas other staff freely described stressful incidents, both personal and professional. Younger teachers in particular seemed to be either less familiar with stress or better able to cope, which they attributed to team support and to the lack of pressures outside work.

Stress was defined in various ways, depending on personality and educational experience, but was generally felt to be an inability to cope when faced with one or a range of stressors, whether personal or work-related. Things are out of control become ‘all consuming’, you feel ‘squashed’ and eventually ‘something’s got to break’. It was commented on that the magnitude of the experience of stress was particularly affected by how much control an individual felt over the situation and the support they were receiving from others. Reported causes of stress varied from individual to individual and involved both personal and work factors and variously one major stressor or a combination of stress factors lowering resilience. School factors frequently mentioned included difficult student behaviour, dealing with parents, and workload pressures beyond the classroom such as administration, report-writing and attending meetings. It was apparent that at this school striving to maintain high levels of achievement created its own particular pressure, especially on newer teachers. Personality clearly impacted on experiences of stress; some people went home and worried over relatively minor issues which did not seem to affect other people, accounting in part for different levels of individual morale amongst staff.

There was a consensus amongst interviewees that it was possible to have both high levels of stress, and maintain high morale, although not indefinitely. Changes in stress levels seemed to be more immediate and temporary than changes in individual morale, it was possible to have a ‘day from hell’ but still retain a positive outlook, although prolonged stress would eventually impact on morale.
Interviewees seemed to equate well-being with individual morale, as a physical, emotional and mental state which reflected whether a person was happy or sad and incorporated ‘all aspects of your life’. Concern for well-being was felt to be one of the strongest features of the school extending to students and a universal role. Staff considered that Leadership Team care for them extended beyond the work environment into their personal lives, for example by actively encouraging them to take leave whenever needed. This support was felt to be particularly important in coping with the stresses and demands of the job. Constructive suggestions about further improving the level of staff well-being included restricting the pressures of work outside the classroom, for example, by keeping meetings as short as possible, recognising the benefit of giving people another fifteen minutes at home with their families and facilitating staff social activities.

In contrast to the more global construct of ‘well-being’, job satisfaction was associated closely with aspects of work itself. The overwhelmingly common element mentioned by staff was the students, taking pleasure in them and their achievements. Staff described a range of experiences with children where they felt they had made a difference or overcome a particular challenge. An important element of job satisfaction was positive feedback from students, parents and other teachers. Recognition from the Leadership group was particularly valued: ‘they do notice, they do appreciate it, they do understand’. The other frequently-mentioned aspect of job satisfaction came from the social aspect of teaching, teamwork with other staff, and the conviviality of the staff room and staff functions. A number of staff had made good personal friends in the school. In general the reported level of job satisfaction seemed to decrease with seniority with teachers in their first two or three years of teaching being more enthusiastic.

When asked about the current Staff Opinion Survey, interviewees liked doing it online because they felt comfortable with the technology and they preferred the anonymity. Despite criticism of aspects of the Survey, interviewees agreed they had filled it in honestly and seriously - but doubted the motivation of other people. There was a general feeling that the Survey had increased in importance in recent years with greater preparation of staff undertaken by the Principal but some interviewees felt that comments made about the possible adverse effects of negative Survey results were unnecessarily directive.

There seemed to be two particular general reactions to doing the Survey, which appeared to have some correlation with personality and subjective experiences of stress and morale. Those who reported low stress levels and consistently high individual morale had fewer problems with completing the Survey as their responses tended to be relatively straightforward and unproblematic. However, people with more variable experiences of stress (whether work or personal) and morale, or of a more anxious disposition, found it more difficult to answer some Survey questions as they felt more uncertainty about both the nature of the question and of their own responses.

The main criticism made of the Survey was the requirement to fit a response into some neat box without the opportunity to explain an answer, to indicate variations in, for example, stress levels, and no chance to say ‘yes but why’. There were also concerns about subjective interpretations of questions by people with different
mindsets and some interviewees felt the Survey was too long, expressing frustration with repeated, ‘regurgitated’ questions. There was also a concern that the Survey did not provide a course of action to remedy any problems arising. For those who valued openness, the anonymity of the Survey was seen as a negative, because it simply provided an opportunity for people with an axe to grind, for whatever reason. An alternative and better method of assaying staff organisational health was the current performance review process. Others thought that for staff who did not want to use existing channels of communication, it was a chance to voice concerns honestly they liked the separation of the process and the ‘blank canvas’ on which to respond. Most people considered that their responses were consistent from year to year. This seemed to represent an underlying feeling that school morale and staff satisfaction with the school was as high as it had been in the past.

The School in Context
Two other similar case studies have now been completed, in a secondary school and a P-12 school. Preliminary analysis has shown considerable variation in context between each of the three schools, with lower levels of morale in those schools with a secondary component, consistent with Survey findings, along with a higher degree of complexity and less opportunity for effective teamwork. Job satisfaction for staff in all three schools came from student achievement and progress. Common stresses were workload issues (especially those resulting from curriculum change and administration) and external pressures.

Consistent across all three case studies were major reservations about the Staff Opinion Survey. There was widespread criticism both of the Survey itself and of how Survey findings are interpreted and applied in particular organisational contexts. These perceived limitations included the nature of the response sample in individual schools, response generalisation (the tendency for a particular attitude, especially negative, to be duplicated across a number of responses), reliability problems (variation in response over time), Survey question issues (closed and repeated questions, conceptual interpretations etc); and, most significantly, reservations concerning the degree of applicability of aggregated benchmarks. It is suggested that administrators using the Survey need to take into account these criticisms and consider accompanying Survey data with non-generalisable but context-specific qualitative measures of organisational health such as interviews or focus groups, encouraging more open communication and a greater sense of ownership.
D2: REPORT TO SCHOOL B

Overview
- Eleven random individual staff interviews recently completed as one of three case studies of schools; range of staff from inexperienced to experienced & including both classroom teachers and administrators
- Questions about well-being, job satisfaction, stress, morale and the Staff Opinion Survey
- Interviews lasted 35-45 minutes
- People gave of themselves and spoke freely about all aspects of their work

General Patterns
Staff interviewed were positive about the school in general and seemed to take a real pride in it

- They approved of the broad direction in which the school had been taken and believed that the profile of the school had been lifted
- This was felt to be particularly the case since the change in leadership four or five years ago
- The school had benefited from the ‘tightening up’ of processes and expectations of both staff and students
- They liked recent initiatives such as the Year 9 Program and sports programs
- They considered it to be a good place to work, a major factor in this was the way in which staff supported each other and worked in teams
- Recent staff turnover after a long period of stability was seen to be a good thing, with younger staff providing energy and new ideas

Well-being
- Well-being was equated with individual health, both physical and mental, and was determined as much by external as by work factors
- When asked about well-being at work, many staff indicated that higher expectations had increased the workload and pressure on staff, resulting in a shortage of time to get things done, particularly for staff with responsibilities
- The number, length and content of formal meetings was also something that was often felt to be an issue for staff, particularly at more stressful times of the year (rescheduling of meetings as had occurred at the end of Term 2 had been appreciated); some people felt that having more control of their time outside the classroom would be beneficial
- Staff mentioned that social interaction was an important element in making work worthwhile and enhancing well-being; for example, they liked the gatherings after work on Fridays and other staff get-togethers

Job satisfaction
- Almost universally, job satisfaction for staff came from positive interactions with students or developing innovative curriculum or programs which benefited them
- Student behaviour was felt to be generally ‘good’, although raising student aspirations still remained a goal for many teachers
Stress and Morale

- Experiences of stress were particularly subjective and seemed to be strongly influenced by personal factors.
- Stress was generally defined as an inability to cope with one major stressor or a range of stressors; which at work might include issues such as workload, time management, student behaviour and dealing with parents.
- A crucial element in reducing experiences of stress seemed to be support from fellow staff.
- Morale was often defined as the level of positive feeling in an individual or group although a number of interviewees questioned the extent to which it was genuinely a group attribute.
- High morale was indicated by effective teamwork, energy and positive staff interaction; low morale by staff avoiding each other and general negativity.
- Staff morale was generally felt to be ‘fairly good’, although it was recognised that there were variations across the staff and during the year.

Staff Opinion Survey

- Staff generally don’t hold much store by the Staff Opinion Survey.
- Most people considered they answered the Survey honestly and seriously but they had real reservations about the reliability of their own responses and the use of Survey in diagnosing organisational health.
- In particular there was a common belief that responses were affected by how one was feeling at the time, and that could easily vary from day to day.
- Another major criticism was that people felt uncomfortable and ill-equipped to answer questions about other people’s experiences and feelings.
- The Survey was felt to be unnecessarily repetitive and lacking any opportunity to explain answers.

- My comment would also be, because this seems to be a relatively stable staff, many people would not have had recent experience of other schools, so there would be little objectivity about their assessments.
- A comparison with the previous year’s Survey results would therefore seem to me to be more valid than a comparison with external benchmarks; I would expect that this year’s results would show a marginal improvement on last year’s, although it was completed at a particularly busy time of the year when you would expect morale in general to be slightly lower.
D3: REPORT TO SCHOOL C

Overview
- Thirteen individual staff interviews recently completed in one of three case studies of schools; range of staff from inexperienced to experienced & including classroom teachers, administrators and SSOs
- Questions about well-being, job satisfaction, stress, morale and the Staff Opinion Survey; individual interviews lasting 30-65 minutes
- People spoke freely about all aspects of their work
- The school had a relaxed and welcoming atmosphere to which staff, students and administration all contributed

General Patterns
Staff interviewed were generally positive about the school in general and took pride in its achievements.

- They felt that the school had undergone change with the increased and wider enrolments; it was no longer as much a ‘community’ school as it had been
- Interviewees felt that it was an extremely stable school in terms of its staff, which had positives and negatives, older staff providing the benefit of experience but sometimes finding it more difficult to cope with curriculum and organisational changes, and the evolution of the school’s identity
- Staff generally enjoyed working in the school and felt that the standard of teaching was quite high
- However, there was a widespread perception of divisions within the staff
- Some interviewees felt there could be greater acknowledgement of staff by the leadership

Well-being
- Well-being was equated with individual health, both physical and mental
- There was considerable variation in well-being, determined as much by external as by work factors
- Older staff seemed to experience lower levels of well-being (adaptation to change, career path etc)
- One particular factor operating on well-being was the implementation of new curriculum and an associated concern that existing ‘good teaching’ could be undervalued.
- Initiatives such as a PD visit were appreciated by staff and were helpful in enhancing well-being.

Job satisfaction
- Almost universally, job satisfaction for staff came from student achievement, positive interactions with students or developing programs which benefited them
- Staff felt that students were generally well-behaved
- Job satisfaction had declined for some staff

Stress and Morale
- Experiences of stress were particularly subjective and seemed to be strongly influenced by personal factors
- Stress was generally defined as an inability to cope with one major stressor or a range of stressors; which at work might include issues such as workload, time management, fellow staff, student behaviour and dealing with parents
- Major stress factors in the school were curriculum change and relations between staff
- Crucial elements in reducing experiences of stress were teamwork and support
- Morale was usually defined as the level of positive feeling in an individual or group; with high morale shown by effective teamwork, energy and positive staff interaction; and low morale by staff avoiding each other and general negativity
- Staff morale was generally felt to be ‘average’ to ‘above average’ but with higher morale amongst P-6 than 7-12 staff (this is typical State-wide) and divisions between staff
- Morale seemed to be lower for some staff during the period when subjects/allotments were being organised for the following year

Staff Opinion Survey
- Staff generally had little time for the Staff Opinion Survey; a number of interviewees were puzzled by the perceived discrepancy between their view of organisational health of the school (‘it has its problems, but it’s generally pretty good’) and the depressing picture painted by the Survey figures
- Most people considered they answered the Survey honestly and seriously but doubted the responses of others
- There were a number of major criticisms: including the generalisation of negative responses, lack of reliability (variation in response from day to day); not being able to answer on behalf of others; closed, repetitive questions; problems with conceptual definition; and the inappropriate use of statistics to compare schools
- Staff preferred alternatives such as interviews or focus groups which would encourage an open climate with people working together to solve problems
APPENDIX E: RESEARCH FINDINGS

SELF-DESCRIPTION OF PERSONALITY

<table>
<thead>
<tr>
<th>Interview</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LT/A1</td>
<td>Full-on, like coming to work, pretty outgoing and supportive, happy</td>
</tr>
<tr>
<td>T/A2</td>
<td>Low key, flexible, easy going</td>
</tr>
<tr>
<td>T/A3</td>
<td>Warm, kind, find it easy to talk to people and engage children, make people feel comfortable</td>
</tr>
<tr>
<td>T/A4</td>
<td>Very laid-back, fairly relaxed, don’t have a problem getting along with most people, try and do my best</td>
</tr>
<tr>
<td>S/A1</td>
<td>Happy, try and change things I don’t like or make the most of it if necessary, caring</td>
</tr>
<tr>
<td>T/A5</td>
<td>Quite shy and quite reserved (though not in teaching personality), a talker, like to have a lot of fun, open to change, family’s really important to me</td>
</tr>
<tr>
<td>T/A6</td>
<td>Easy-going, a bit bubbly, happy</td>
</tr>
<tr>
<td>LT/A2</td>
<td>Caring, easy-going, sensitive... in a good way and bad way</td>
</tr>
<tr>
<td>T/A7</td>
<td>Confident, sharing, I am myself, I don’t care</td>
</tr>
<tr>
<td>P/A</td>
<td>Generally happy, innovative, not very patient</td>
</tr>
<tr>
<td>S/A2</td>
<td>Friendly but not confident, outgoing to a point</td>
</tr>
<tr>
<td>T/B1</td>
<td>Generally optimistic, on the quieter side, can be sensitive</td>
</tr>
<tr>
<td>T/B2</td>
<td>Honest, positive and appreciative, grateful</td>
</tr>
<tr>
<td>T/B3</td>
<td>Friendly, approachable, caring, fair</td>
</tr>
<tr>
<td>T/B4</td>
<td>Fairly cheerful and optimistic and dogged, stubborn</td>
</tr>
<tr>
<td>T/B5</td>
<td>(Only need one word), optimistic, I tend to always see the positives... I get rid of the negatives, I don’t tend to remember them</td>
</tr>
<tr>
<td>LT/B</td>
<td>Dedicated, fairly positive, pretty happy, cheerful, easy-going unless stressed, honest</td>
</tr>
<tr>
<td>AP/B</td>
<td>Intense, organised, insecure</td>
</tr>
<tr>
<td>T/B6</td>
<td>Positive&quot;, caring, outgoing in some ways</td>
</tr>
<tr>
<td>T/B7</td>
<td>Reasonably positive, big picture sort of person, like doing things my way</td>
</tr>
<tr>
<td>S/B</td>
<td>Friendly, light-hearted, (how I’d like to be seen at least)</td>
</tr>
<tr>
<td>T/B8</td>
<td>Enthusiastic, patient, friendly, positive</td>
</tr>
<tr>
<td>P/B</td>
<td>Question not asked</td>
</tr>
<tr>
<td>T/C1</td>
<td>Fairly compassionate, caring, fair bit of empathy</td>
</tr>
<tr>
<td>T/C2</td>
<td>Outgoing but very personal, confident here</td>
</tr>
<tr>
<td>LT/C1</td>
<td>Diligent, likes to finish a job, approachable, not easy-going, organised, serious, not happy-go-lucky and casual</td>
</tr>
<tr>
<td>T/C3</td>
<td>Try and be fairly genuine, short fuse; appreciate humour, a bit colder, a bit more distant than other teachers</td>
</tr>
<tr>
<td>LT/C2</td>
<td>Very good sense of humour, suffer fools very badly, enjoy life, can be serious, bit introspective</td>
</tr>
<tr>
<td>AP/C</td>
<td>Honest, open, and caring</td>
</tr>
<tr>
<td>S/C1</td>
<td>Quietly determined!, try to be pleasant, fairly tolerant but stand my ground</td>
</tr>
<tr>
<td>S/C2</td>
<td>Don’t like conflict, I like a nice, balanced situation, will avoid it</td>
</tr>
<tr>
<td>LT/C3</td>
<td>Inclination to be positive and optimistic, introverted, need time alone when I get home, but I probably can extravert quite successfully when I have to</td>
</tr>
<tr>
<td>P/C</td>
<td>Passionate, inquisitive (in light of my well-being), concerned</td>
</tr>
<tr>
<td>T/C4</td>
<td>Fair, not as consistent as I should be, quite verbose</td>
</tr>
<tr>
<td>T/C5</td>
<td>Outgoing, friendly, a bit daggy, and confident</td>
</tr>
<tr>
<td>LT/C4</td>
<td>Try to be easy-going, generally happy, a person who tries to fit in and work with what’s there</td>
</tr>
</tbody>
</table>