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The challenge of managing the research process: initial ideas to co-created new knowledge

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Abstract

This article reflects on the experiences of a PGR leading a Research England funded project that commenced in summer 2022. The project is being carried out under the auspices of the University of Leeds Research Culture Crucible. The project remains ongoing and focuses on how best to support teachers to engage with professional development (PD). The main activities from which data has been sourced were three online roundtable discussions, each held in July 2022, supported by pre- and post-event surveys.

However, the focus of this article is not the research itself but the process of bidding for funds, planning for and undertaking the initial research, and building on that research, leading to newly co-created meaning and avenues of investigation. For example, the researcher led a discussion about the project at the AEA-Europe Annual Conference in November 2022, and is now developing 10 case studies of successful teacher engagement with PD, based on the original findings.

Structure and background

Firstly, I will outline the methodology used to develop this paper, which is intended to be an autoethnography based on my own personal experiences of managing a research project between spring 2022 and summer 2023. Secondly, I will use alternate 'chapters' and 'reflections' to recall and reflect upon the progress of the project from its inception to its current state. Finally, I will endeavour to reflect on the process of developing this paper and my experience of using autoethnographic techniques for the first time.

I was inspired to experiment with autoethnography by reading a pre-print paper authored by a friend and colleague, who delved deep into their own past to uncover repressed memories of perceived failure (Tissington, 2023); I was intrigued to see if I could capture my experiences of becoming a PGR using a similar method. According to Adams et al (2017) "Autoethnography is a research method that uses personal experience ("auto") to describe and interpret ("graphy") cultural texts, experiences, beliefs, and practices ("ethno")." I have very much relied on my personal circumstances, interpretations of situations, exposure to contexts, and real first-hand experience to inform my recollections and reflections.

Methodology and motivations

This *reflexive memoir* is mainly intended as an autoethnographic recollection and retrospective analysis of my experience of the process of being involved in a research project, developed from my own notes made during the process, emails and meeting notes, and spending time reflecting on the experience after approximately 12-18 months had passed. Thus, I must acknowledge my own subjectivity and emotional connection with the research project (Ellis et al., 2011), and also recognise the possibility of straying into a *personal narrative* at some points. I believe the dividing line between a reflexive memoir and a personal narrative is at best blurred and perhaps may not really exist, and I acknowledge that there is debate over the efficacy of personal narrative as a research method (Heidelberger & Uecker, 2009, and Moen, 2006). I recognise that my experience is just that: *my* experience. My central aim is to document that experience and use it to create a connection with the reader to enable them to reflect on their own experiences in relation to managing research and co-creating knowledge. I believe my observations and reflections are valid and reliable, as I am a seasoned member of the research community, with over 30 years' experience of working in and around public sector and academic research. However, I remain cognisant, like Mendez (2013), not just of the advantages of using memoir as autoethnography, such as the opportunity to see into private worlds full of rich data, but also of its limitations, including the personal or exposed nature of some disclosures, which can raise challenging emotions in researchers and readers alike.

I have tried not to be too selective about my remembrances, but to remain authentic and fully mindful of the wider cultural context of the process, whilst documenting it faithfully in a hopefully engaging yet informative way. As Mann & Walsh say, "a record of reflection is the reflection itself" (Mann & Walsh, 2017, p.130), that is that simply writing about experiences forced me to reflect, although they acknowledge the tension when writing becomes the focus rather than the reflection itself. However, I felt quite free to write what I wanted about the issues that seemed relevant, without going into the minutiae of events or decision-making. I have broadly followed the steps in Tummons's framework for reflective writing (Tummons, 2010, p.77), to consider events, my reaction to them, and what I have learnt from the process. I have drafted my recollections in chapters, each followed by a reflection on that chapter, my aim being to tell the story punctuated by conscious, reflexive self-evaluation of the process and my part in it (Tissington, 2023). This interleaving of recollection and reflection also echoes Schön's technique of reflective conversation, where the research "talks to the situation" and the situation "talks back" (Schön, 2016, p.79), contrasting his models of reflection-*in*-action with reflection-*on*-action (Schön, 2016, p.49), leading to what I call my 'call and response' model of alternating chapters and reflections (see Table 1: Call and response model, drawing on Schön, 2016 and Tissington, 2023 below).

Reflection-*in*-action	Intuitive, tacit, and immediate application of deep-seated and rich knowledge	Broadly corresponding to my chapters
Reflection-*on*-action	Considered, deliberate, and conscious contemplation without new or additional actions necessarily being undertaken	Broadly corresponding to my reflections

Table 1: Call and response model, drawing on Schön, 2016 and Tissington, 2023

My motivations for writing this reflexive memoir include, but go beyond, a desire to record my experiences before they become overlain with later ones. I also want to learn from those experiences, and to share them with others who might be considering undertaking similar work at a similar stage in their academic careers. I have tried to bear in mind this purpose and prospective audience of readers (Mann & Walsh, 2017, p.133) as I have been reflecting and writing, piecing together a narrative of memories supplemented by what Mann & Walsh (2017, p.146) call a portfolio of notes, emails, and other artefacts.

Ethical considerations

I am conscious that autoethnography always includes reference to and impacts on others, not just the researcher. Building on Richardson's idea of "ethical ethnography" (Richardson, 2000, p.253) and her ideas about ethical reflexivity (Richardson, 2000, p.254), I have taken care to share drafts of this paper with key players in the bidding and research process and taken their comments and feelings into account. I hold myself accountable to meet ethical standards for discussing the people and events I have mentioned. Whilst obtaining upfront informed consent is not a realistic scenario in writing such as this, retrospective consideration of all parties' thoughts and recollections is an important element of being honest and respectful about the events being described, analysed, and evaluated (Edwards, 2021).

Reflexive memoir (or personal narrative?)

CHAPTER 1: ORIGINS

In Spring 2022, less than six months after starting my doctoral studies, I noticed an invitation to a series of three, fortnightly, half-day Research Culture Crucible (RCC) workshops, which offered the chance not only to collaborate with other researchers but also to bid for money to support small projects focused on an aspect of research culture. Coincidentally, I had been speaking with a colleague (Mick) about the possibility of researching barriers to teachers' engagement with professional development (PD) and how some overcome these barriers, which is hugely affected both by the culture in their schools but also by access to funding and high-quality PD opportunities. I attended the workshops and met individually with other fellow 'crucibilists' to discuss their projects and mine. I was supported (and encouraged) in my endeavours by Mick, and we developed a 'teaser' to share at the second workshop, and a set of slides for presentation at the final workshop, to outline our project rationale, plan and bid for funds.

REFLECTION 1

This initial period only lasted about four weeks, but in my mind, it seems much longer. It was a time of intense discussion, reading, learning, drafting, and editing. Working out what we wanted to do and how best to achieve it was exciting and energising. I do work well under pressure, and this felt quite pressured, even though it was entirely voluntary and separate from my doctoral research. I always enjoy working with Mick, who offered sage advice and made some great suggestions about how we could proceed. Meeting with other 'crucibilists' was interesting and encouraging, although not directly relevant to our bid. The teaser and the presentation were received well, and the bid was successful, which was a huge relief given how much work I had done.

Chapter 2: project planning (co-creation between researchers)

It took about a week after our presentations for 'crucibilists' to be told that all our bids were successful. The email informing me of our success is attached at **Error! Reference source not found.**. It helpfully includes feedback on the bid and suggestions for improvement, which were useful as we entered the project planning phase. As part of the bid preparation, we had developed an outline timeline and research methodology, but now we had to build a much more detailed plan, find, and recruit our participants, and put the plan into action. Firstly, my co-researcher and I agreed to subdivide the required actions. Mick focused on finding participants from amongst his professional contacts, with a variety of lengths and levels of experience as teachers or as professionals supporting teachers, such as teaching union officials or subject association staff, who might be able to attend a roundtable event either in-person in Leeds or online in Microsoft Teams; I sought teachers I knew who I thought might be willing to participate, some of whom I had trained as Chartered Educational Assessors (CIEA, 2023). We decided to run events characterised as 'roundtables' rather than 'focus groups', as whilst focus groups offer an "opportunity to study the ways in which the individuals collectively make sense of a phenomenon and construct meanings around it" (Bryman, 2001, p.338), we wanted also to promote open, free-ranging, frank, democratic conversations, avoiding hierarchies or preconceived notions of the participants as 'research subjects' and encouraging exposure to, consideration of, and reaction to others' perspectives (Evans & Kotchetkova, 2009).

To complement the roundtables, I drafted pre- and post-event surveys to collect a small amount of quantitative data about participants to establish a general picture of their perspectives on access to and engagement with PD, which was used to help identify emerging themes for further investigation in the roundtables, and to capture participants' views after the roundtables. More challenging was our application for ethical approval, as I had never drafted one before, and it had to be done very quickly if approval was to be in place so we could send out roundtable invitations in good time.

Reflection 2

Drafting the project plan, finding participants, and designing research instruments were all well within my comfort zone, and are amongst my favourite parts of the research process, as all is anticipation at this point. What I found more challenging was the timescale for the whole project, which was that we had to have carried out the work and invoiced for all expenses by the end of July. This was a requirement of Research England, who were funding the work. Since we were only awarded the money in early April, this was a very tight timescale, especially since ethical approval can take several weeks or even months.

I found Mick's support hugely important, as he had not only been through the process of ethical approval several times before but had also sat on the relevant ethics committee. Even so, the project did not receive approval until late June (see screenshot at Appendix B), which was stressful and potentially put the whole project in jeopardy. Whilst we had tentatively approached participants and asked them to hold a date for a roundtable, we were not able to share the Participant Information Sheet, seek informed consent, confirm arrangements, or distribute the pre-event survey until we received ethical approval.

Chapter 3: undertaking the research (co-creation with participants)

It was a significant challenge to find sufficient and diverse participants, who were also willing and available at short notice. We arrived at a total of 15, five for each roundtable, nine teachers and six other professionals. All 15 returned their pre-event survey, but one dropped out of the first roundtable on the day, so the total number of participants ended up being 14. Mick ran the first roundtable online, I ran the second online, and we ran the third one jointly online, having had to pivot on the morning of the last roundtable from an in-person meeting on campus to an online meeting due to the extreme hot weather and the precarity of travel by public transport. Due to the short notice, we still had to pay for the refreshments, although meeting room costs were waived.

The roundtables were recorded and transcribed, with participants briefed in advance that we were hoping to extract case study material from their comments. Mick and I spent several weeks after the roundtables checking and correcting the transcriptions for accuracy; Microsoft Teams does not always catch the nuances of conversation, especially if voices overlap or a participant has a strong regional accent. Mick created an initial coding frame, and we organised the transcribed comments by theme. These themes were developed and refined over the next few weeks, as they were combined or split, depending on the strength of representation and emerging links between them.

I spent some time chasing participants to return their post-event surveys; 11 were eventually returned, the last some six weeks after the roundtables were held. I also spent considerable time liaising with colleagues at the university to get each school, professional organisation, and independent consultant set up as a supplier, issued with a purchase order, so they could submit an invoice, and then get the invoice paid. I had started this process about a month before the roundtables, once our participants were confirmed, but it took so long and so many emails, that it was not concluded until late August. I had to deal with at least five different teams across the School, Faculty, and University.

Reflection 3

Carrying out the surveys, roundtables, and thematic analysis was enjoyable and reasonably straightforward. It was, however, equally time-consuming ensuring that our participants were set up as suppliers and paid for their time. This proved tortuous. It was not clear to me who in the process could do what or who was responsible for paperwork being processed and approved. I had no way of checking what was happening other than emailing individuals and hoping they would respond. I spent a lot of time chasing for responses, often to be told to ask someone else. This was really stressful on top of an already heavy workload and felt unnecessarily convoluted.

I understand that this period coincided with the university's financial year end, a very busy time for all concerned, and that this probably exacerbated the issue, but it did not feel collegiate or supportive to someone like me who was new to the process and needed help to understand it. I probably made mistakes along the way but believe that was due to insufficient guidance and the lack of a single, simple system that I could access and manage. This is in no way disparaging of the individuals, who by and large were responsive and helpful once I found the right person in the chain of command, but I remain critical of the system and its lack of user-friendliness, which not only drained my time and energy, but also affected those I was contacting and our participants and administrative staff in their organisations, who in turn spent time chasing me.

Chapter 4: next steps in the research process (co-creation between researchers and with participants)

Mick and I had submitted an abstract to the Annual Conference for AEA-Europe, to be held in Dublin in November 2022. In the event, Mick could not attend, and I led a dynamic one-hour discussion attended by about 20 delegates, based on a working draft of our initial findings, derived from the surveys and thematic analysis. This energetic discussion initiated several dialogues and new connections with researchers from around the world, which was exciting for me as a new academic. Notes of the session summarising the lively discussion are attached at Appendix C.

The process for submitting or sharing the working draft of our report to the Research Culture Team or to Research England has never been clear. However, Mick and I have continued to work on it, developing 10 case studies during summer 2023, based on participants' comments made at the roundtables. Draft case studies were shared with each originating participant; many added a few extra details or provided some clarification. We are currently seeking a journal or similar to publish them, ideally alongside the research report, or a version thereof. The case studies cover a range of contexts and strategies which are proving successful in overcoming barriers and enabling teachers to engage in PD. See Appendix D for an index of the case studies.

Reflection 4

I was very much looking forward to presenting at the AEA-Europe conference, alongside Mick, but the reason he did not attend was almost entirely financial. Even though we underspent on the project (largely due to converting the third roundtable to an online meeting) and asked if we could use those funds to cover Mick's conference travel and registration, that change in use was not permitted, despite many, many emails debating it. As a new researcher, having a trusted colleague co-leading a session with me would have felt very much less nerve-wracking. Of course, Mick was adamant that I was more than capable of leading the session myself, and I was, but it did feel scarier and slightly unfair that Mick could not be there to enjoy and develop the fruits of his labours too. The need for intense and frequent liaison with various teams about this and the participants' payments has put me off bidding for similar funding for the time-being. However, I have learnt a lot about the processes of bidding and budgeting, and writing up and sharing research findings, including that I can hold my own in a roomful of experienced academics, because I know my subject and have a breadth and depth of experience to draw upon.

It feels very much like the work is in our hands now, which might be how it is meant to feel, but to us, the funders seem more focused on the process and do not seem terribly interested in the outcomes. We feel that the relationship could have been much more open and perhaps a bit more flexible or responsive. We are clear that the case studies add value to the report but could also stand alone, so we are exploring ways of publishing them that will expose them and our work to an appropriate audience.

Final reflections

Undertaking and then reflecting on my first-hand experience of the process of bidding for funding, carrying out the research, and now trying to get it 'out there' has proved very instructive. As Tummons (2010, p.105) said "finding some time to think" is vital to understanding my place in the wider academic landscape; he was talking about teaching more widely, but I believe the sentiment is pertinent to my developing identity as a researcher and to this attempt at autoethnography.

Retrospectively, it is hard to disentangle the excitement of planning the project, having the funding bid accepted, and undertaking the research activities, from the slog of the administration, mainly financial in nature; I would have been lost and unable to draft this paper without my notes and other sources of evidence, for example, those attached as appendices. These artefacts helped me to maintain fidelity to the timeline and sequencing of events, and sometimes gave me clues as to my state of mind as I made notes of animated and inspiring conversations or sent excited or frustrated emails.

I have strived to be conscientious and to remain faithful to the autoethnographic process, valuing the story and making it accessible and engaging, by blending my personal experiences with critical thinking (Adams et al., 2017), "making connections between past and current experiences" (Mann & Walsh, 2017, p.147). I like to think I have addressed all five of Richardson's criteria for evaluating ethnography as a method (Richardson, 2000, p.254): "substantive contribution, aesthetic merit, reflexivity, impact, and expression of a reality", whilst seeking meaning, to learn about myself and the research process.

Whilst I have been critical of some parts of the process, I hope I have remained respectful of all those individuals involved in it. As Holman Jones (2005) almost said, I see this autoethnography as a highly personal perspective on the process, which might in some small way make the research world a better place. I agree that "by writing a narrative of our experiences we are better able to understand and control them, enabling changes to current and past practices to be made" (Mann & Walsh, 2017, p.148). My experience of developing this paper has led me to believe autoethnography merits a place in my research canon, as a powerful iterative tool to promote reflexive habits and therefore as a valuable method to support improved research practices.

If you are interested to hear more about this work, or would like to add your thoughts on or experiences of barriers, solutions, and the impact of PD on teachers, please get in touch with Marianne at edmjt@leeds.ac.uk

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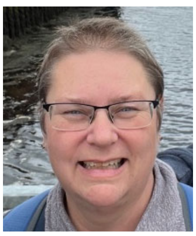
Biography

Marianne Talbot is a post-transfer PhD researcher at the University of Leeds School of Education. Her area of interest is the impact of professional development in educational assessment on



qualified teachers, their assessment practice, and their influence on others around them. Her experience is in qualifications and assessment development and evaluation, project management including impact assessments, and course leadership for the Chartered Institute of Educational Assessors, based at the University of Hertfordshire.

Appendices

Appendix A

(Screenshot of email confirming the project funding, including feedback on our bid)

[redacted] Leeds 8 April 2022 at 12:13
Research Culture Crucible Funding Success
To: Marianne Talbot

Congratulations Marianne

Your Crucible Project application has been successful! [redacted] considered the feedback projects received from the panel and the community, and came to the conclusion that we want to fund them all. All projects were viewed positively and we couldn't choose between them.

Please do start planning as we look at how best to handle the awards. If you already have an account at the University at you oversee we may be able to do a direct transfer to it. I am still checking.

We will continue to support you and the projects in the Crucible team channel and will add info as we get it.

Congratulations again and thanks for participating in the Research Culture Crucible.

Selected feedback to help you refine the project:

- The project addresses a pervasive barrier to intersectoral collaborative research, with great potential for advancing both research and practice. I wondered if one challenge might be reaching those difficult to release from their duties for the sessions.
- I see this project as being about engaging a community in the [research] work of the University of Leeds. It has potential to give insights into how to establish what would motivate members of a community to engage with research activity at Leeds. The project meets the funding criteria and the amount requested seems reasonable.
- Although this is an interesting project, I didn't see how this would change or influence the research culture at Leeds - the project seemed to relate to professional development provided by us rather than professional development of our researchers. Can the project team strengthen the link to Research Culture
- This is a really well written and well designed piece of research but I am not entirely convinced it is within scope of this funding. For that to change I would need to see more thought / activity looking to change the way researchers at Leeds research within educational settings e.g. to move our practice to do research with rather than on / about teachers.
- This is an unusual project, I originally wondered why teachers would engage with a project to explore something that they don't normally engage with. However, I think the collaborators know what they are doing and have really thought about the roundtable approach. It could produce something interesting.
- Well presented. Clear objectives that was well scoped with a focus on certification. Looking at barriers and how persons have overcome these barriers. – Chartered Education Assessors. A global approach looking at other stakeholders which is refreshing.
- Not quite sure how the focus group outputs will be generalizable – would like to see interviews with people who haven't accessed funding over a given length of time.

[redacted]
Organisational Development & Professional Learning
University of Leeds
LS2 9JT
Tel: [redacted]
Ext.

My working day may not be your working day. Please read, act on or respond at a time that works for you.

Appendix B

(Screenshot of email confirming ethical approval of the project)

From: **ResearchEthics** researchethics@leeds.ac.uk
Subject: RE: Ethics review request - engaging teachers in professional development, ethics reference LTEDUC-123 - Favourable outcome
Date: 24 June 2022 at 13:25
To: Marianne Talbot edmjt@leeds.ac.uk
Cc:

Dear Marianne,

LTEDUC-123 - Engaging teachers in professional development

NB: All approvals/comments are subject to compliance with current University of Leeds and UK Government advice regarding the Covid-19 pandemic.

I am pleased to inform you that the above research ethics application has been reviewed by the School of Business, Environment and Social Services (AREA) Committee and I can confirm a favourable ethical opinion based on the documentation received at date of this email.

Please retain this email as evidence of approval in your study file.

Appendix C

Notes of Engaging Teachers in Professional Development Discussion,

AEA-Europe Annual Conference, 11/11/22

Marianne Talbot, University of Leeds

The discussion followed a 10-minute introduction, presenting findings so far from fieldwork carried out in summer 2022. Delegates were responsive and keen to contribute based on their own experiences and perspectives. They acknowledged barriers to PD, including the difficulty of getting teachers out of the classroom and/or out of school. They also highlighted that, in a model of 'input-activity-review', teachers struggle to fit the 'activity' stage in. Hidden barriers can exist where teachers do not want to engage, for example SLT and staff can have very different viewpoints, motivations, and expectations. It was suggested that, in England, some academy chains have alienated their staff with respect to PD, including teaching assistants.

Helpful solutions suggested included having a menu of opportunities with signposting to a wide variety of PD, although it was agreed that this requires someone to coordinate, organise cover, and ensure the school can function in the absence of the teacher. It was suggested that this could be enhanced by collaboration with the local authority and/or other schools. The use performance management discussions to plant seeds, such as 'what is PD in this instance?' was advocated. It was noted that less experienced teachers probably need considerable guidance – but in a neutral/open way so as not to shut down interests or opportunities. Modelling was recognised as a key method of demonstrating good PD engagement and practice.

It was acknowledged that a shared vision and values can lead to successful engagement which in turn can lead to successful implementation. Reflective practice can benefit students and self-reflection can help identify skills and areas to improve, as part of performance management and talking to colleagues. Keeping PD manageable is key, otherwise it can become overwhelming, but time should be allowed for trialling, reviewing, considering pros and cons, and building bridges between PD and practice, perhaps using communities of practice. PD and its impact can be very individual; it does not necessarily need to be managed or organised or recognised if there is a sound rationale which is communicated and negotiated.

Delegates from Sweden suggested that teacher appetite for PD is higher there, and that

online solutions have been embraced, such as a MOOC for teachers leading on SEND. Norway has a massive online PD programme, used mainly by upper secondary teachers, less by lower secondary, and even less by primary – teachers' capacity to engage varies enormously. Ireland provided online PD for 32,000 teachers during covid-19 and has protected two days per annum to focus on curriculum changes, the hypothesis being that such system-wide approaches can be supportive.

It seems sensible to demonstrate online for teachers teaching online, but this is both a high trust model and potentially a lonely one if teachers have no-one to discuss the PD with, so perhaps a hybrid model could be more beneficial. In person PD is almost always preferred, if possible, to allow for subtleties of tone and body language, and informal interactions, but supplemented by live remote sessions and asynchronous activities such as forum posts.

Appendix D

(Screenshot of an extract from the project report, showing the range of case study titles)

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