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# Professional Development Manual

**A Practical Guide to Planning and Evaluating Successful Staff Development**

**Second Edition**

SCHOOL  
MANAGEMENT  
SOLUTIONS

**Sonia Blandford**

Pearson  
Education

SCHOOL  
MANAGEMENT  
SOLUTIONS

**Professional Development Manual**

Second  
Edition

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Education

*A Practical Guide to Planning and Evaluating Successful Staff Development*

# **Professional Development Manual**

## **A Practical Guide to Planning and Evaluating Successful Staff Development**

**Second Edition**

**SONIA BLANDFORD**



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# Abbreviations

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ACAS	Advisory, Conciliation and Arbitration Service
ARR	Assessment, recording and reporting
AST	Advanced skills teacher
BA(QTS)	Bachelor of Education (Qualified Teacher Status)
BEd	Bachelor of Education
CBI	Confederation of British Industry
CEO	Chief Education Officer
CPD	Continuing professional development
DfEE	Department for Education and Employment
DfES	Department for Education and Skills
DTI	Department of Trade and Industry
EdD	Doctor of Education
EDPs	Educational development plans
ERA	Education Reform Act
ESRC	Economic and Social Research Council
GEST	Grants for Education, Support and Training
GTC	General Teaching Council
HEADLAMP	Headteachers' Leadership and Management Programme
HEI	Higher education institution
ICT	Information, communication and technology
IIP	Investors in People
INSET	In-service education and training
IPM	Institute of Personnel Management
IT	Information technology
ITE	Initial Teacher Education
ITT	Initial Teacher Training
KS	Key Stage

## Abbreviations

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LEA	Local Education Authority
LMS	Local management of schools
MA	Master of Arts
NASSP	National Association of Secondary School Principals
NEAC	National Educational Assessment Centre
NFER	National Foundation for Education Research
NOF	New Opportunities Fund
NPBEA	National Policy Board for Education Administration
NPQH	National Professional Qualification for Headship
NPQSH	National Professional Qualification for Serving Headteachers
NPQSL	National Professional Qualification for Subject Leaders
NQTs	Newly qualified teachers
NTTP	National Training Task Force
NVP	National Vocational Qualification
Ofsted	Office for Standards in Education
PDP	Professional development profile
PGCE	Postgraduate Certificate of Education
PhD	Doctor of Philosophy
PTD	Professional training days
QTS	Qualified Teacher Status
SDP	School development plan
SEN	Special educational needs
SENCOs	Special educational needs co-ordinators
SRB	Single regeneration budget
TEC	Training and Enterprise Council
TTA	Teacher Training Agency

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# Introduction

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## **PROFESSIONAL DEVELOPMENT**

The professional development of practitioners is at the centre of the government's drive to raise standards in schools. A quick glance at the Department for Education and Skills (DfES) website ([www.dfes.gov.uk](http://www.dfes.gov.uk)) will leave the reader in no doubt as to the importance of the professional development in schools. Schools, as learning organisations, have a commitment to the development of their community. In preparing this manual, the aim is to provide a manageable and accessible guide to the theory and practice of professional development in schools.

## **WHO IS THE MANUAL FOR?**

The manual is compiled for the community of learners:

- headteachers
- senior managers and leaders
- pastoral and curriculum leaders
- governors
- teachers
- learning support assistants
- technicians and administrators.

## **WHAT DOES THE MANUAL DO?**

This manual provides practitioners and managers with guidance and advice on how to plan and evaluate successful staff development in schools. Set within the context of the learning organisation, the manual is written and designed in an accessible style and presents practical solutions.

The manual is both a guide and resource, providing solutions to real problems. Worked examples are given in response to theoretical and practical issues. The reader will also find definitions and descriptions of new initiatives and government legislation.

The manual aims to provide the reader with:

- knowledge and understanding of professional development, theory and practice
- a recommended course of action that will deliver results.

The manual is divided into ten sections, which include:

- a framework for practice based on current theories and legislation

- practical guidance, including case studies
- checklists for practitioners, subject and department/year teams, key stage teams and whole-school management
- executive summaries
- workshop materials.

Each section of the manual will help you to:

- identify your role in the learning community through an understanding of professional development and access to further information to guide your professional growth
- develop a personal professional development plan that suits your own professional learning style
- identify a location and context for professional development through knowledge, understanding and self-management and planning
- measure the impact of professional development on professional practice.

## **THE POLITICAL CONTEXT OF CPD**

A clear and pragmatic description of continuing professional development (CPD) is provided in one of the study units for the National Professional Qualification for Headship (NPQH).

*Effective CPD is a planned process of continuous development throughout an individual's career. It is the systematic and progressive improvement of people's job-related competencies and a means of engaging them in the process of meeting individual and organisation objectives. The hallmark of a strategic approach is the degree to which the school effectively integrates an individual's learning objectives with school improvement objectives, in order to achieve pupil performance targets, and to satisfy the professional and personal aspirations of staff.*

Source: DfEE (2001a)

## **USING THE MANUAL**

The aim of the manual is to provide the reader with the means of ensuring that schools are places of learning and development for staff, both teaching and non-teaching. The manual provides practical advice on how to implement appropriate strategies to meet the professional development needs of all staff.

The manual will give examples of policies and practices that can be transferred to your school. You may wish to skim through the manual quickly to get an overview. Each section will need to be read as appropriate to individual and school development needs. Advice in the manual is supplemented by a range of activities that might prove useful. Figure i illustrates how the manual leads the reader from the principles of the learning community to identifying institutional and individual needs encompassing self-development.

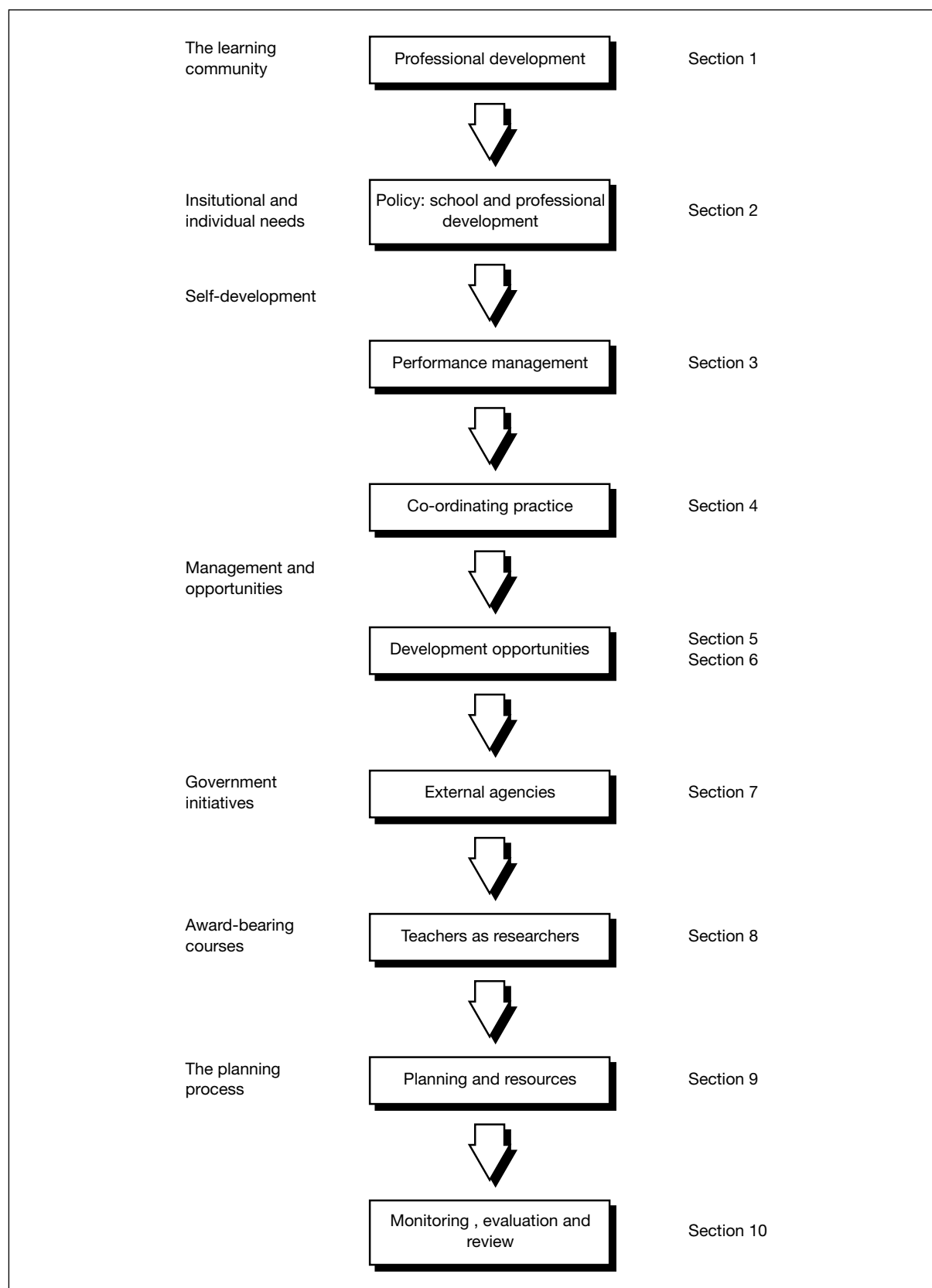


Fig. i Using the manual

## **SUMMARY OF EACH SECTION**

### **Section 1: Defining professional development**

This section introduces the reader to the purpose and context of professional development. There is an explanation of the stages of development in a teacher's career and an introduction to the types of professional development available to all staff employed in schools.

### **Section 2: Linking school and professional development**

In-service education and training (INSET) should link professional development to school development. This section describes school development planning, staff development planning, the role of middle management/team leadership and the linking together of school and staff development. Worked examples are given of training staff to participate in school development planning, a department/subject development plan and a school development plan.

### **Section 3: Performance management**

Performance management is central to staff and school development. If a school is to improve, individual development targets need to be met. This section includes the purpose of performance management and the process. Much of this section is based on worked examples of creating a job description, classroom observation, giving feedback, interviews and statements, and target setting. Case studies are also presented.

### **Section 4: Co-ordinating professional development**

The role of the professional/staff development co-ordinator is critical in the management of staff development. Few schools have the funds for such a post. In practice the co-ordinator will be an overcommitted senior manager/deputy headteacher with many other roles and responsibilities. This section introduces the role and process of managing staff development. The importance of learning styles is examined and suggestions made as to how professional development can meet individual and institutional needs.

### **Section 5: Development opportunities in school**

Schools are organisations with many and varied training opportunities. This section introduces you to induction, mentoring, self-development, teams, in-house courses, job exchange, management development and consultancy. The induction of newly qualified teachers, whole-school INSET materials, developing teams and positive reasons for working as a team are presented as the concluding workshop.

### **Section 6: Whole-school in-service education for teachers**

In-service education and training days require planning; this section provides guidance on subject-based and whole-school training, management and monitoring. Worked examples are given of programmes, management, learning and communication.

## Section 7: A framework for professional development

Recent initiatives for the professional development of teachers include Investors in People, The General Teaching Council and the National Standards for teachers. Each is detailed in this section.

## Section 8: Accreditation and research

A range of training opportunities is provided by higher education institutions. This section introduces the reader to accreditation through award-bearing courses from initial teacher training to doctorate, encompassing school, LEA and HEI partnerships. There follows an introduction to the government's Best Practice Research Scholarship initiative. The section concludes with detailed advice on how to approach personal study and research.

## Section 9: Planning and resources

As shown throughout this manual, effective staff development requires planning and resourcing. This section brings the manual to a working conclusion by taking you through the planning process, encompassing participation and decision making, and strategic and operational planning. Website addresses are listed to provide you with easy access to funding.

## Section 10: Monitoring, evaluation and review

The final elements in planning professional development are monitoring, evaluation and review. Staff development will only be successful with effective monitoring, evaluation and review procedures. This section describes the process of monitoring and evaluating practice. The workshop provides worked examples of whole-school INSET on information to help evaluation and establish agreement on good practice.

### Checklist

#### Manual Structure

The **framework for practice** introduces the reader to background information for each of the key elements in planning and evaluating professional development in schools. This enables you to consider how management issues relate to your school before looking at **practical guidance**. Examples of good practice are presented in several ways: lists and diagrams, guiding you through each issue; case studies, detailing actual practice in schools; and questions for you to consider as you reflect on the content of each section.

**Checklists** are provided to assist practice, detailing what is required for effective professional development. As a reminder of the key ideas presented in each chapter, **executive summaries** are provided.

The final component of each section presents **workshop materials**. In order that theory becomes practice, the manual includes worked examples that can be adapted to both primary and secondary schools.



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# Executive summary

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This section has provided an introduction to professional development and how to use this manual. Key points to consider are:

- management and planning
- development and resourcing.

By placing teachers at the centre, this manual will show that teachers' professional learning is enhanced when:

- it is perceived as having direct and practical benefit to themselves and their work in the classroom

*Creative activity could be described as a type of learning process where teacher and pupil are located in the same individual.*

Source: Arthur Koestler

- it acknowledges teachers' capacity to be self-critical

*Don't accept that others know you better than yourself.*

Source: Sonia Friedman

- it gives the opportunity to reflect on and confront their thinking and practices

*An educational system isn't worth a great deal if it teaches young people how to make a living but doesn't teach them how to make a life.*

Source: Unknown

- it is actively supported by headteacher and colleagues
- the outcomes are related to:
  - improved skills in curriculum and management
  - a review of attitude towards self and others
  - the development of positive and effective collegial relationships
  - career development.

The role of the staff development co-ordinator is central to the success of professional development in schools. This manual is an introduction with worked examples. You will need to select from it what is applicable to your team and your school.

The following section defines professional development in the context of current practice.
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## Section 1

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# DEFINING PROFESSIONAL DEVELOPMENT

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Schools are learning organisations, aware of the changing culture and environment, internal and external. School governors and managers are responsible for leading, managing and developing members of the community of learning, recognising that a learning organisation will make use of the skills and talents of all its people.

This section contains guidance on:

- introduction to professional development
- why professional development?
- what is professional development?
- management.

Checklists provide readers with the means to monitor and evaluate their own practice. The section concludes with an executive summary detailing the main points and key issues. Practical advice is given on management of staff development in schools.

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# Chapter 1

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## INTRODUCTION TO PROFESSIONAL DEVELOPMENT

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As professionals, teachers view the school in which they work as a place of learning and development. For all members of the school community learning and development are central to the process of schooling. While it is axiomatic that schools provide learning and development opportunities for pupils, schools should also provide a learning environment for all staff – teaching and non-teaching. The expertise and experience of teachers and support staff are a school's most valuable resource. School governors and managers need to take a greater responsibility for the training and development of the staff in their community. Figure 1.1 illustrates the emergence of professional development in schools.

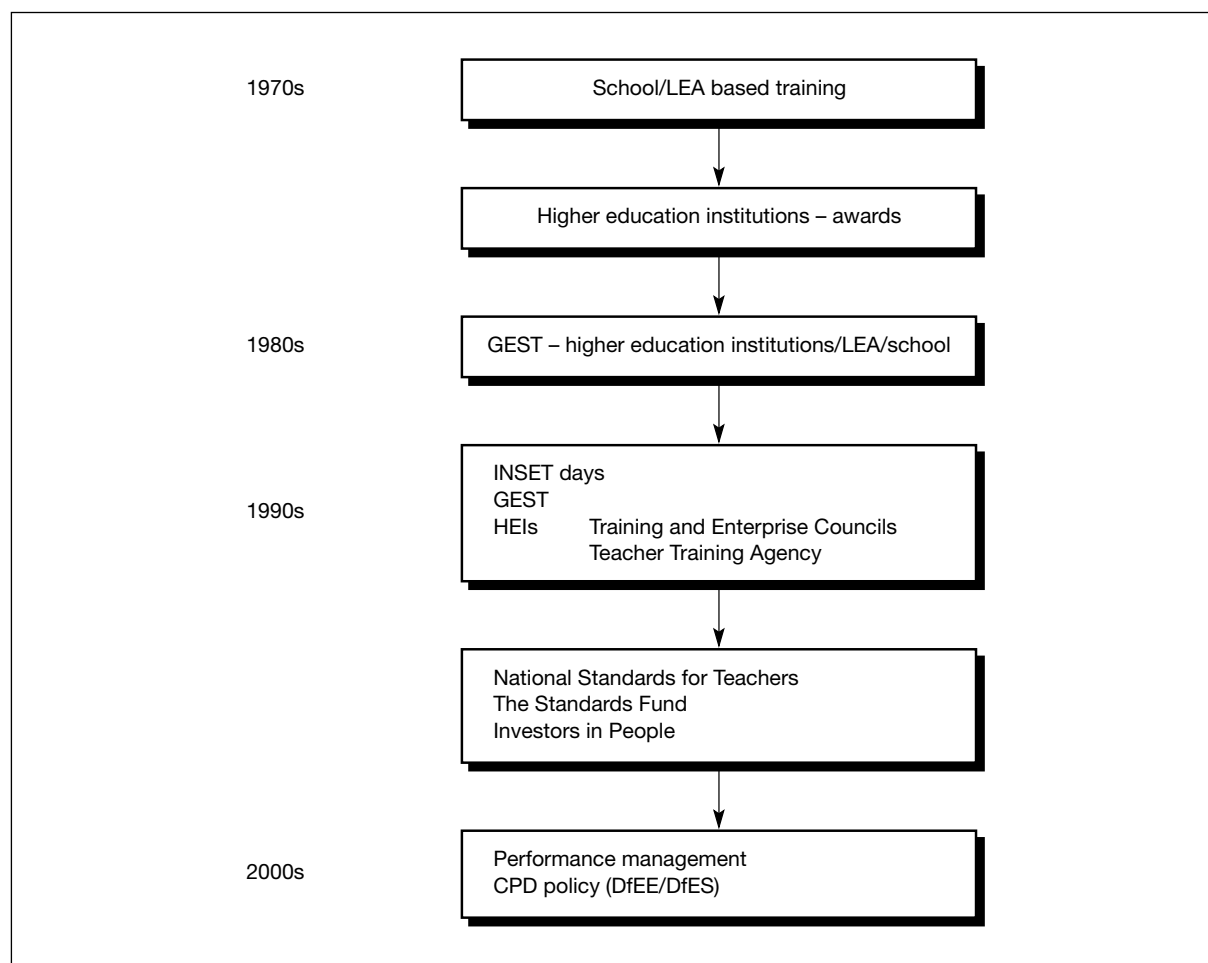
Senior managers, teaching staff and support staff have a responsibility to members of the learning community; they also have a responsibility to each other. Members of the school community should consider themselves as belonging to learning organisations. Staff feel valued when their governors and managers assist them in their training and development.

*There is an interesting and crucial shift by the DfES, GTC and the National College for School Leadership to look now at professional learning communities. A research project is being commissioned to look at how schools create and sustain such communities. The report on the project will be available in the summer, 2004, and will focus on:*

- *the characteristics of 'effective professional learning communities' and what these look like in different kinds of schools/settings*
- *the key enabling and inhibiting factors – at local, institutional and department/team levels – which seem to be implicated in the initial creation, the ongoing management and the longer-term validity of these communities*
- *innovative and effective practice in managing human and financial resources to create time and opportunity for professional learning and development to optimise its impact*
- *generating models which serve as credible exemplars of 'professional learning communities'*
- *informing leadership programmes about creating and sustaining 'professional communities'.*

*Professional development and learning for teachers and other adults will include continuous/embedded learning, as well as specific courses.*

*Source: McCall and Lawlor (2002b, p. 133)*



**Fig. 1.1 The emergence of professional development for teachers**

Within the framework of continuing professional development (CPD), self-development and staff development are prerequisites for effective and improving management, teaching and schools. Equally, a precondition and an outcome of effective CPD policies is a culture that encourages reflection and development. A teacher's experience in school should not be restricted to the classroom and staffroom. However, the prospect of further changes should be noted.

There is an increasing number of development opportunities for staff in school. Within a learning organisation, practitioners and managers should have knowledge of the range of internal and external programmes available.

## **DEFINITION**

The terminology associated with professional development in schools requires explanation. The majority of teachers and support staff will associate professional development with in-service education and training (INSET).

In-service education and training is defined as: 'Planned activities practised both within and outside schools primarily to develop the professional knowledge, skills, attitudes and performance of professional staff in schools' (Hall and Oldroyd, 1990a).

In-service education and training is therefore a 'catch-all' term encompassing continuing professional development and training opportunities. In practice, the majority of teachers' only experience of INSET is that of the compulsory training days managed by either LEA advisory teams or senior managers in schools. Professional development opportunities are many and varied, as shown in this manual. As McCall and Lawlor (2002b, p. 146) indicate, there are significant differences between a learning environment and learning organisation:

*Learning environment*

*(Troubleshooting focus)*

- *Staff not motivated*
- *Staff lack some important, necessary skills*
- *Help staff to do their job better*
- *Increase openness between senior and middle managers to enhance professional relationships*
- *Improvement in staff/student self-esteem*
- *Seek better evenness in management strategies between consultation, negotiation and prescription.*

*Learning organisation*

*(Success focus)*

- *Staff see openness to learning as important for them as well as students*
- *See school development as a cyclical, on-going process of organisational learning*
- *Protect, as far as possible, professional development work being interrupted by other issues/events*
- *Examine effectiveness of the school as a learning organisation, including review of preferred/alternative learning styles*
- *Ensure free flow of information from courses, inspection, research and self-evaluation.*

## **MANAGEMENT**

The key to the successful management of professional development is planning and evaluating. Good practice requires sound policies and procedures. If staff are to develop knowledge, understanding, skills and abilities related to their craft, schools require effective management. Professional development should emphasise the professional competencies of the successful teacher as follows:

*Knowledge and understanding:*

1. *Knowledge of children and their learning*
2. *Subject knowledge*
3. *Knowledge of the curriculum*
4. *Knowledge of the teacher's role*

*Skills:*

1. *Subject application*
2. *Classroom methodology*
3. *Class management*
4. *Assessment and recording*

*Source:* Hall and Oldroyd (1990a)

Teaching and non-teaching staff require guidance on what is available to assist them in the development of their professional practice. The staff development co-ordinator/professional development co-ordinator has a responsibility for the management of internal and external activities. Effective communication is essential if all staff are to benefit. Knowledge and understanding of performance management and performance review targets is also relevant. Professional development needs to be clear and useful. Ask the question: 'What does it bring, in the best instances, to **professional** practice'?



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## Chapter 2

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# WHY PROFESSIONAL DEVELOPMENT?

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Estelle Morris, Secretary for State for Education and Skills (DfES, 2002), stated:

*It's [CPD] actually core to the standards agenda. It's actually the essence of what we mean by improving the station of the profession, by giving teachers more standing in the community and amongst other professions, and without professional development we can't possibly get what we all want to achieve, which is better teaching and more effective learning in the classroom, so in terms of where its place is in the big picture, in the big education strategy, it's core to everything that's been done and it's core to everything that's going to go on in the future.*

The need for professional development is rooted in the changing role of education practitioners. The culture of schools is also changing. Rapid changes to the curriculum and the devolution of management responsibilities from LEAs to schools have led to a shift in management and leadership styles affecting schools as organisations, as follows:

From:	To:
fixed roles	flexible roles
individual responsibility	shared responsibility
autocratic	collaborative
control	release
power	empowerment

Teachers are involved in:

- day-to-day management of teaching, learning and resources; collaboration on clearly defined tasks, monitoring and evaluation
- participation by representation in working groups set up by the senior management team to discuss specific tasks or directives from governing agencies or school policy groups.

*Teacher life long learning in the form of continuing professional development (CPD) is increasingly regarded as an important means of contributing to the creation of more effective schools, and as integral to learning organisations.*

Source: O'Brien and MacBeath (1999)

Professional development will lead to school improvement. A self-developing school will have (Earley, 1994):

- *an emphasis on development of the individual within the organisational context*
- *more individuals undergoing professional development*
- *professional development not isolated from other developments*
- *professional development related to the context of the school*
- *professional development about both individual and organisational needs.*

Professional development opportunities are the result of collaboration, participation and negotiation. A practitioner's professional career should be viewed as a continuum with a right to support at any and every point within it. Such an approach, wider than simply succession planning for senior management posts, requires a detailed analysis of the needs and aspirations of the profession in order to meet them as fully as possible.

Professional development experiences perform four major functions. They:

- 1 enhance the personal and professional lives of teachers
- 2 provide a remedy for ineffective teaching
- 3 set the groundwork for implementing school aims
- 4 introduce changes.

### **Checklist**

#### **What is the purpose of professional development?**

The purpose of professional development can be summarised as the development of knowledge, understanding, skills and abilities that will enable staff to:

- develop and adapt their range of practice
- reflect on their experience, research and colleagues' practice in order to meet pupil needs, collectively and individually
- contribute to the professional life of the school
- interact with the school community and external agencies as professional practitioners
- keep in touch with current educational thinking in order to maintain and develop good practice
- consider educational policy, in particular how to raise standards
- have a wider understanding of society, in particular information, communication and technology (ICT).

### **Checklist**

#### **Why professional development?**

Professional development will:

- enhance and improve professional knowledge and understanding, skills and abilities
- improve each teacher's ability to teach and, therefore, their pupils' opportunity to learn
- clarify professional beliefs and values.

*Source: Earley (1994)*

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## Chapter 3

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# WHAT IS PROFESSIONAL DEVELOPMENT?

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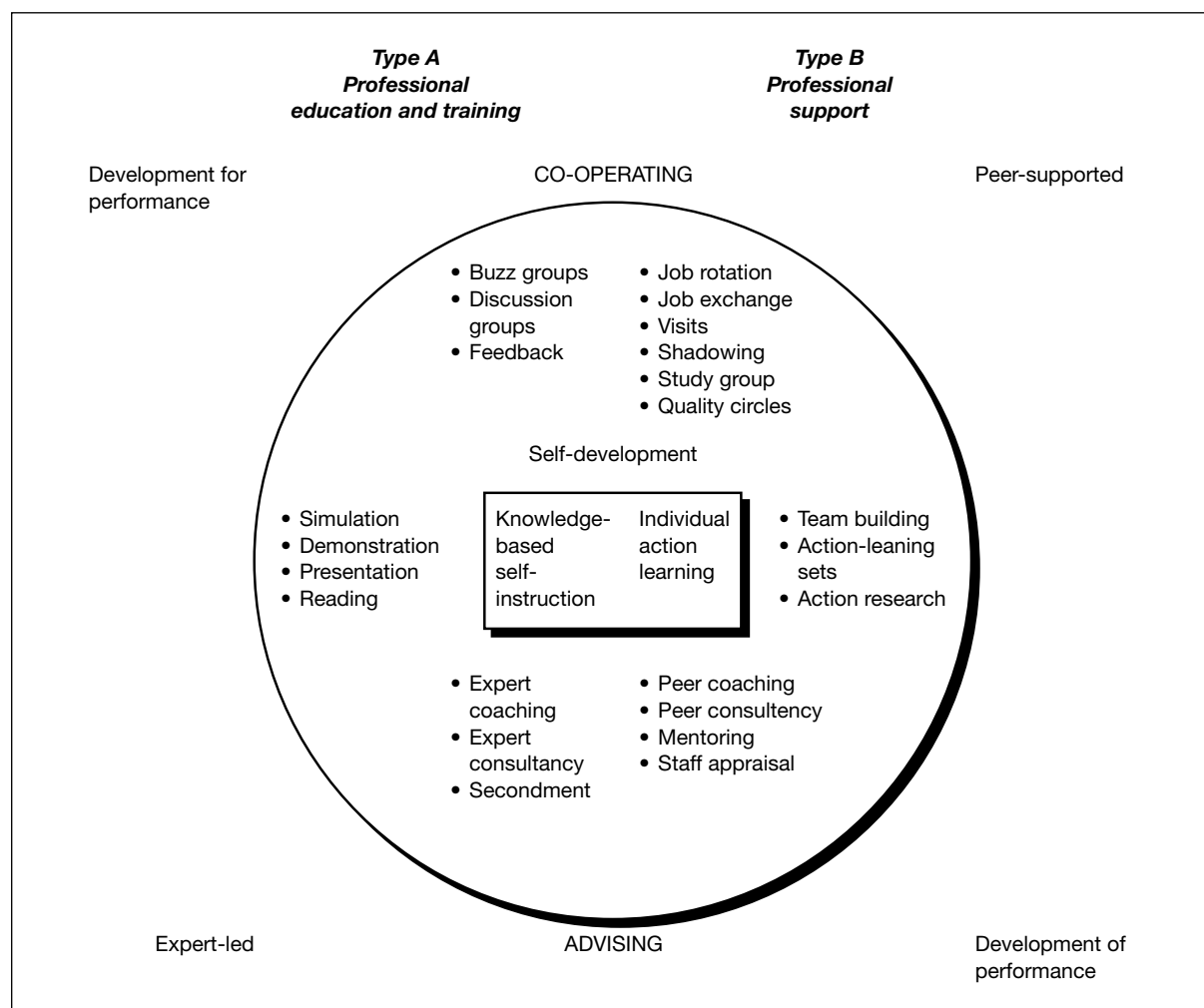
Earley and Fletcher-Campbell (1989, p. 87) state: 'The developer must be developed'.

Professional development is the development of teachers and support staff to enhance their knowledge and understanding, and their skills and abilities to improve the quality of teaching and learning. In practice, development is a term encompassing any experience or process that helps to bring out an individual's full potential. Development embraces both individual and school improvement. The government and the teachers' representative body, the General Teaching Council (GTC), state that CPD is to:

- *develop a shared understanding in the profession about what professional development and learning should include*
- *influence national policy and funding*
- *raise teachers' expectations both on entry to the profession and of professional learning communities*
- *enable teachers to reflect on how they can and do contribute to the professional, collective knowledge about teaching and learning*
- *provide the basis for widening opportunities for accreditation and recruitment*
- *provide support for school leaders in making time and support available*

Source: GTC (2002a)

As a manager and practitioner you should aim to improve the quality of your own practice and that of your staff. You will be responsible for achieving targets and will only succeed if the people who work with you are competent. Therefore you should offer the members of your school and team sufficient training and development. Figure 1.2 illustrates the range of professional development processes available to schools. Many of these activities are described in this manual. The diagram will assist the reader in determining the next suitable type of professional development, as it provides a clear indication of the possibilities for individual and whole-school development. Schools should be learning organisations.



**Fig. 1.2 Professional development in schools**

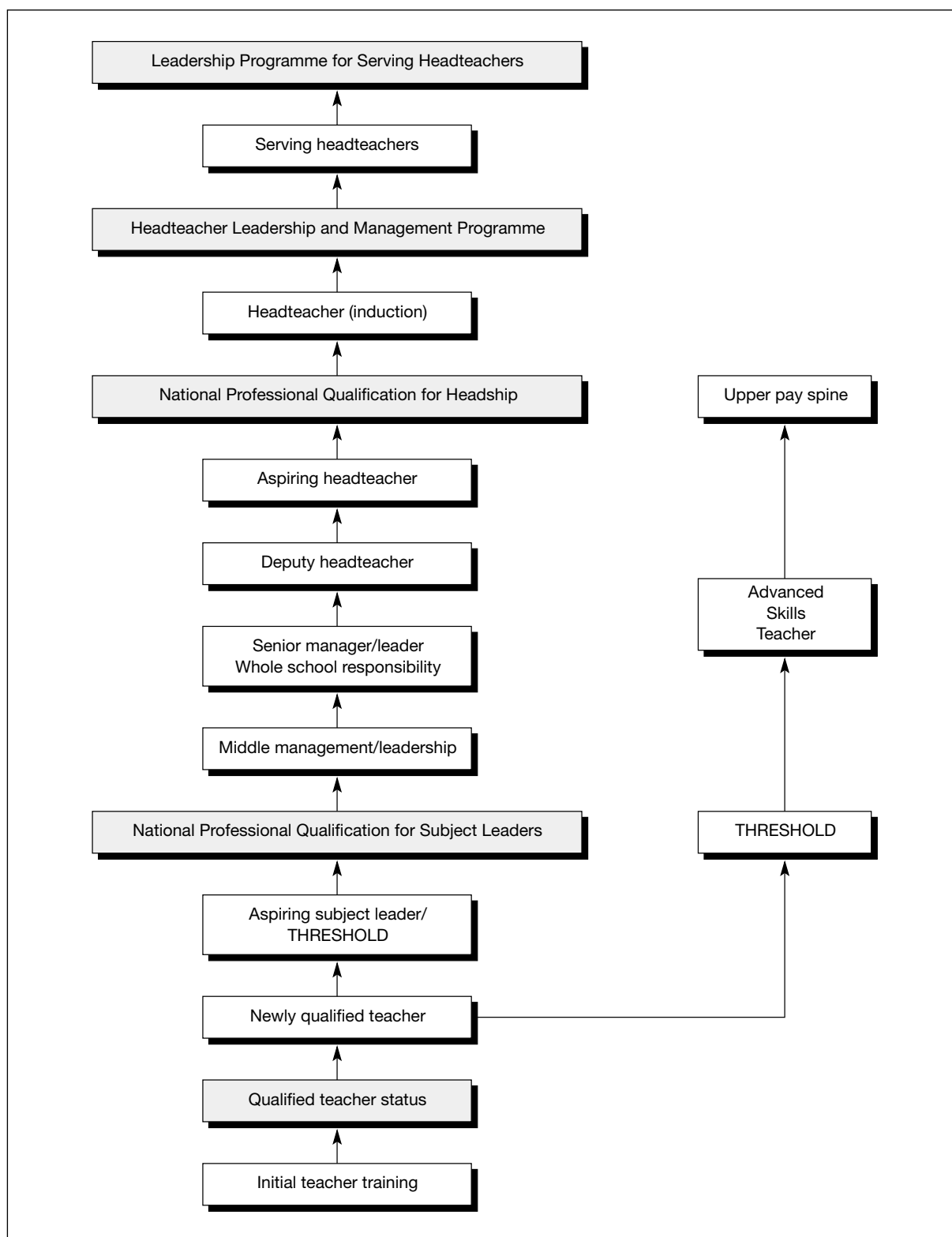
*Source:* Manchester LEA (1986)

For the practitioner, staff development will include personal development, team development and school development. In addition to developing individual skills, staff development has a wider importance in:

- promoting shared values
- implementing change
- promoting equal opportunities.

In general, managers, leaders and practitioners have a shared responsibility to see that individuals develop new skills. It is critical to note that staff development should not mean an additional activity. Staff development should be integral to school development.

Professional development builds on initial teacher training (ITT) and induction, including the education, development and training opportunities that are present throughout a teacher's career. Figure 1.3 illustrates the stages of a teacher's career in the context of the Teacher Training Agency National Standards (see Section 7) and Department for Education and Skills framework for professional development in schools (DfES, 2001b).



**Fig. 1.3 Stages of a teacher's career framework – National Standards for Teachers/ professional development**

## **Checklist**

### **What is professional development?**

Professional development involves:

- working with staff to identify professional needs
- planning, organising and facilitating programmes that improve staff effectiveness and are consistent with institutional goals and needs
- supervising individuals and groups
- providing feedback on performance
- providing a remedy for ineffective teaching
- participating in recruitment and development activities
- initiating self-development.

As Fig. 1.3 indicates, the stages of a teacher's career can be considered in terms of leadership and teaching opportunities. The reader should recognise the need for all staff to participate in training and development. The choice of the individual to pursue either a leadership or teaching career should not exclude them from participation in training and development. Professional development encompasses practitioner, training, education and support activities experienced by teachers, middle managers and senior managers (Bolam, 1993).

#### ***Practitioner development***

*School-based development; self-development, induction, mentoring, observation, job shadowing and team teaching (see Section 5)*

#### ***Professional education***

*Award-bearing courses managed and taught at higher education institutions, focusing on the relationship between educational theory and practice, and leading to higher education accreditation and professional qualifications (see Section 8)*

#### ***Professional training***

*Conferences, courses and workshops that emphasise practical information and skills, managed and delivered by local education authorities, school external consultants or trainers from higher education institutions; such courses may lead to accreditation towards national standards or academic awards (see Section 8)*

#### ***Professional support***

*The responsibility of colleagues in school, through the process of fulfilling contractual conditions of service, e.g. recruitment and selection procedures encompassing job descriptions, promotion, career development, performance management, mentoring, team building, redeployment and equal opportunities (see Section 5)*

Source: adapted from Bolam (1993)

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## Chapter 4

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# LEADERSHIP AND MANAGEMENT

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In practice, the responsibility for developing staff is shared. The school as a whole has a responsibility to develop policies and provide resources for staff development. Depending on the size of the school, a middle or senior manager may have responsibility for staff development (see Section 4). Maintained schools will also have the support and guidance of the LEA officers who are trained to provide courses which managers can purchase for their staff. Independently funded schools can purchase these services as required. In accordance with policy, CPD is now systems-led.

*Changes have led to a corporate bureaucracy and increase in accountability measures. These in turn have resulted in the identification of new skills and understanding demanded of teachers. The GTC (2002a) summarises that there is a need to provide teachers with the skills to collect and analyse assessment data, to develop a capacity to act on findings and in short to improve teachers' ability to 'think' like researchers.*

Source: Bolam (2000)

As professionals, teachers should view the place in which they work as a place of self-learning. Self-development and staff development are prerequisites for effective management and effective schools. To this end, individual teachers need to take active control of their own professional development. It is a manager's responsibility to establish structures and systems for the review and development of each of their staff.

Professional development should be dependent on individual enthusiasm, not compulsion. Teachers and support staff should recognise for themselves the need to keep up to date, maintain good practice, network and so on. Learning on the job is as important as attending courses and needs to be recognised as such. Resources (staff and financial) need to be allocated and directed to meet individual and school needs. Appraisal and inspection should be integral to the identification and planning of professional development.

Senior and middle leaders have part of the responsibility for staff development. Managers will know their staff's work, experience and aspirations. As a player manager, a teacher is uniquely placed to assist a colleague's development. A manager can assist staff in their development in several ways:

- as a role model – staff will adopt your practices and attitudes
- by giving specific guidance/training



- by encouraging reflection
- through sensitive delegation
- by promoting development opportunities
- by acting as 'gate-keeper' for information and various opportunities as they arise.

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# Executive summary

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This section has provided an introduction to professional development in schools. Key points to consider are:

- Professional practice has changed; practitioners are now involved in management activities
- Professional development will lead to school improvement
- Professional development involves professional education, training and professional support
- There are stages of development in a teacher's career that are set within the context of the National Standards Framework for professional development
- Management teams have a critical role in the professional development of their staff

In the next section: linking school development and professional development.
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# Workshop materials

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## Workshop 1.1

### MANAGEMENT AND LEADERSHIP

Managers and leaders to complete and reflect on the following:

- Collate all teachers' strengths and weaknesses, whatever their stage of development
- Recommend development activities including roles within learning groups that reflect needs, aspirations and preferred learning styles
- Where appropriate, facilitate group learning
- Respect individual teachers' rights with respect to confidentiality and anonymity.

Strengths	Weaknesses
Development activities (1)	Development activities (2)

## Workshop 1.2

### PRACTITIONERS

Practitioners are to collaborate with their managers in response to:

- teacher involvement in the planning of personal professional development
- the implementation of and experimentation with new practices
- the ownership of the evaluation of new processes implemented in classrooms
- the measurement of the impact of new teaching approaches.

Teacher involvement (e.g. observation, planning)
1
2
3
4
5
Impact on practice – change set against above
1
2
3
4
5

## Workshop 1.3

### MANAGERS AND PRACTITIONERS

Managers and practitioners are to implement:

- arrangement of a timeline to facilitate each teacher's professional learning and development
- support for teachers by steering them towards appropriate and relevant professional learning activities
- follow-up procedures that consider the impact of new practices through the discussion of evaluation evidence.

Timeline	Follow-up
Term 1	
1	1
2	2
3	3
4	4
5	5
Term 2	
1	1
2	2
3	3
4	4
5	5
Term 3	
1	1
2	2
3	3
4	4
5	5

*Source: adapted from Field (2002, p.13)*



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## Section 2

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# LINKING SCHOOL AND PROFESSIONAL DEVELOPMENT

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When planning an in-service programme, any school should consider its own needs as an institution and the aspirations of all who work within it. On many occasions, those two elements will overlap. Sensible managers and team leaders will understand that this can lead to tensions between individual and institutional development needs. Differences in priorities need to be accommodated. As Moon (2000) explains, the working context defines the nature of professional learning, and all interactions and discussions are inevitably lodged in the work base.

This section will assist practitioners, managers and leaders in linking school development to professional development with guidance on:

- writing a school development plan
- professional development policy
- planning staff development
- leading a learning organisation
- middle management in a learning organisation.

If the development, implementation, monitoring and evaluation of school effectiveness are to be successful, staff need to be trained. Collaboration in school promotes discussion. If teachers are to 'break out of their private world' (Putnam and Borko, 2000) the school must be seen as a primary base for CPD. The school has the physical, technological and human resources to make it the richest of learning environments. Therefore, professional development and school development should be determined and planned together. In the context of the drive to raise standards, senior managers and leaders have become increasingly aware of the tensions that exist between individual and whole-school needs. Continuing professional development for teachers has been ignored until recently in the context of school development. Policy makers, managers and team leaders now recognise the need to support individual development if a school is to improve.

Senior and middle managers need to consider staff development when setting targets for school development. Participation in staff development is critical to both individual and school success. A professional development policy should both reflect the aims of the school strategic and development plan and meet individual needs.

This section also provides guidance on preparing school development policies, which are critical elements in the successful management of staff development in schools.



# THE SCHOOL DEVELOPMENT PLAN

---

All schools are required to have a school development plan (SDP). Each SDP will be unique according to institutional needs and the local context. The SDP provides a framework for strategic planning in which staff can identify long- and short-term objectives, which should guide practitioners. A school development plan should relate clearly to the strategic plan – the school vision or mission. A strategic plan will focus on whole-school long-term issues. A school development plan will focus on short- and medium-term targets that will be achieved within a year and contribute to the fulfilment of strategic aims.

The format for SDPs will:

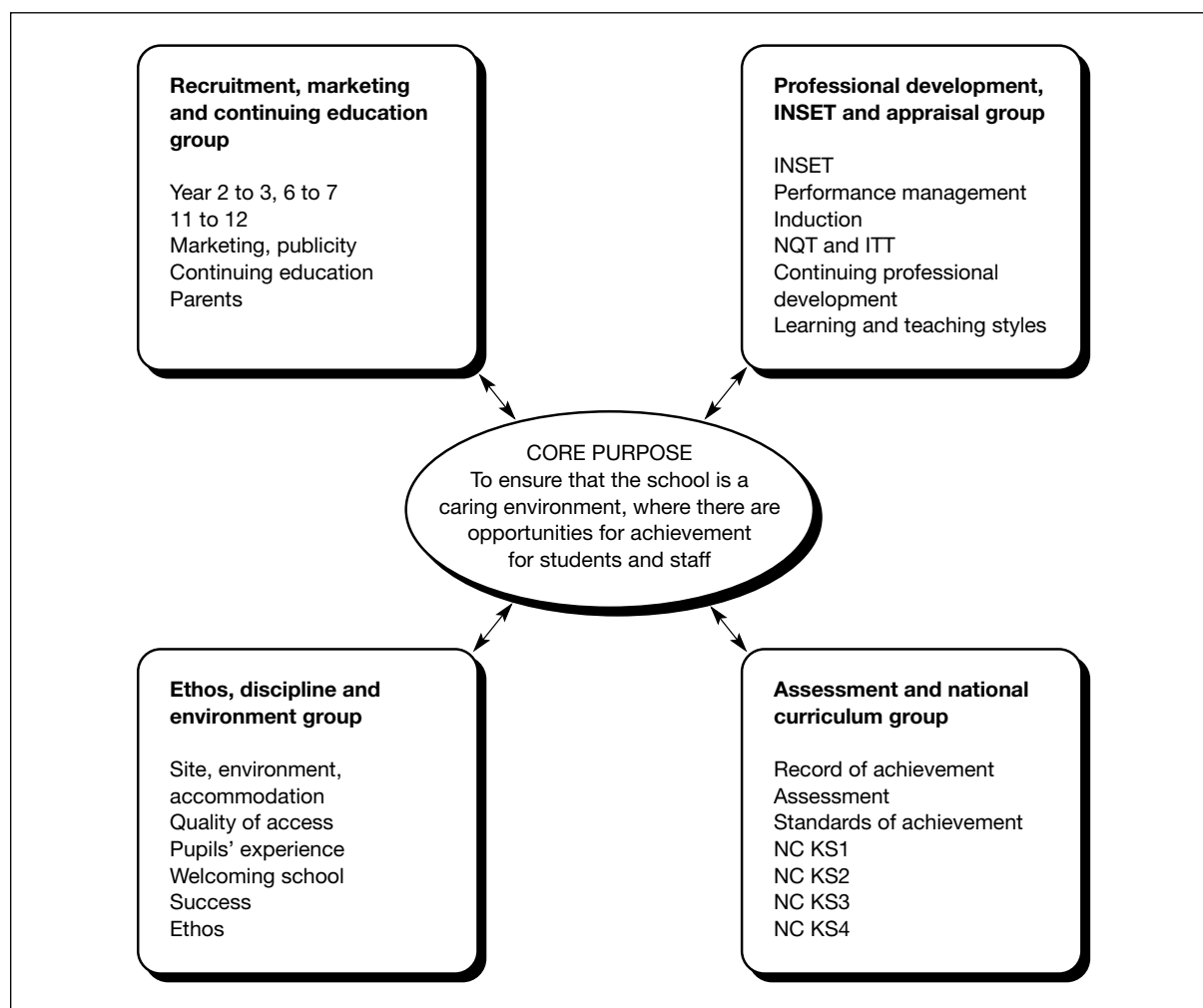
- demonstrate involvement
- provide a focus for action
- provide a means of presenting the plan
- provide a link to staff development
- provide a means of assessing progress.

Figure 2.1 illustrates the framework for a school development plan. This is applicable to both primary and secondary schools. Professional development is shown as feeding into and from the core purpose, relating to both pupils and staff.

Professional development is presented in outline and includes:

- performance management
- induction
- initial teacher training
- newly qualified teachers
- learning and teaching styles.

This example indicates the importance of professional development in relation to teaching. Staff would feel valued players in the implementation of the core purpose. Further phases in the development of the plan would be target setting and allocation of resources.



**Fig. 2.1 Framework: school development plan**

Funding is available for school and staff development from the following agencies:

- Department for Education and Skills – Best Practice Research Scholarships
- local education authorities – Standards Fund
- Teacher Training Agency – National Standards Fund
- Training and Enterprise Council – Investors in People standard.

Further information on the location and management of resources can be found in Section 9.

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## Chapter 6

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# THE PROFESSIONAL DEVELOPMENT POLICY

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A professional development policy should reflect a school management team's desire to value and support its staff. It is self-evident that staff development needs to be placed at the centre of school improvement and effectiveness. An effective and improving school will have clear policies relating to the management of learning, people and resources. Each school should have a professional development policy that defines aims and describes how these will be implemented.

Isaac (1995) cites the Management Charter Initiative (MCI) Standards as a framework for practice in schools:

- |                          |                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Manage policy:</i>    | <ul style="list-style-type: none"><li>● <i>Review, develop and present school aims, policies and objectives</i></li><li>● <i>Develop supportive relationships with pupils, staff, parents, governors and the community</i></li></ul>                                                                                                                               |
| <i>Manage learning:</i>  | <ul style="list-style-type: none"><li>● <i>Review, develop and implement means for supporting pupils' learning</i></li></ul>                                                                                                                                                                                                                                       |
| <i>Manage people:</i>    | <ul style="list-style-type: none"><li>● <i>Recruit and select teaching and non-teaching staff</i></li><li>● <i>Develop teams, individuals and self to enhance performance</i></li><li>● <i>Plan, allocate and evaluate work carried out by teams, individuals and self</i></li><li>● <i>Create, maintain and enhance effective working relationships</i></li></ul> |
| <i>Manage resources:</i> | <ul style="list-style-type: none"><li>● <i>Secure effective resource allocation</i></li><li>● <i>Monitor and control use of resources.</i></li></ul>                                                                                                                                                                                                               |

*Source: MCI (1995), quoted in Isaac (1995)*

A professional development policy will include details of:

- staff performance management targets related to school development targets
- individual needs, as identified by the performance review process
- training opportunities through
  - in-school activities
  - whole-school INSET
  - local education authority courses
  - national initiatives
  - accreditation and award-bearing courses
- resources available from
  - within the school
  - funding agencies
  - external bids.

Once targets have been identified, each school has to plan, implement and evaluate a programme for CPD as described in Sections 9 and 10. A professional development policy will include statements that encompass the following:

- The ultimate aim of CPD within a learning organisation is to improve the quality of learning and teaching. The immediate aim is to improve the performance of those with school management and teaching responsibilities
- The CPD programme balances the needs of the individual with the institutional developmental needs of the school
- The school will have some systematic diagnostic process for individual needs, e.g. appraisal, and for the school's needs, e.g. self-evaluation in relation to the school development plan
- Sets of needs to be balanced are:
  - needs of headteachers, senior staff and teachers
  - needs arising from school development plans
  - needs of the LEA – subject and management
  - needs of LEA policy
  - needs of government policy.

The model starts with the roles of the school, as stated in the mission, vision statements and aims. The General Teaching Council (1993) produced guidance on statements that could be found in a professional development policy, as shown in the following checklist.

## Checklist

### What is a staff development policy?

Staff development policy should be:

- broad
- differentiated
- relevant
- balanced.

Staff should be trained to deliver:

- subjects
- elements of learning
- areas of experience.

Staff should have the opportunity to develop skills in:

- communication
- observation
- study
- problem solving
- literacy
- numeracy.

Staff should have an understanding of:

- equal opportunities
- economic awareness
- health education
- environmental education
- information technology.

Staff should have the opportunity to develop:

- teaching styles
- learning styles
- team work
- resource management
- collaborative working.

*Source:* General Teaching Council (1993)



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## Chapter 7

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# SCHOOL DEVELOPMENT AND STAFF DEVELOPMENT

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A guiding model for a professional development school that relates to the institutional development plan and review is shown in Fig. 2.2. The model illustrates the need for teaching and non-teaching staff to have a range of knowledge and understanding, skills and abilities to meet the needs of their pupils. Each area details what is required for staff development, subjects, teaching and learning styles, elements of learning attitudes and areas of experience. The model also indicates the need for training and development to be relevant, balanced, broad, differentiated and reflected in the institutional development plan. The model is comprehensive and applicable to both primary and secondary schools.

As shown, personal and professional development are directly related to school development. Too much emphasis on meeting school needs may deskill and demotivate teachers and support staff, and lead to staff wastage.

Specifically, leaders and managers should reflect on what choices are available within the context of professional development, identifying:

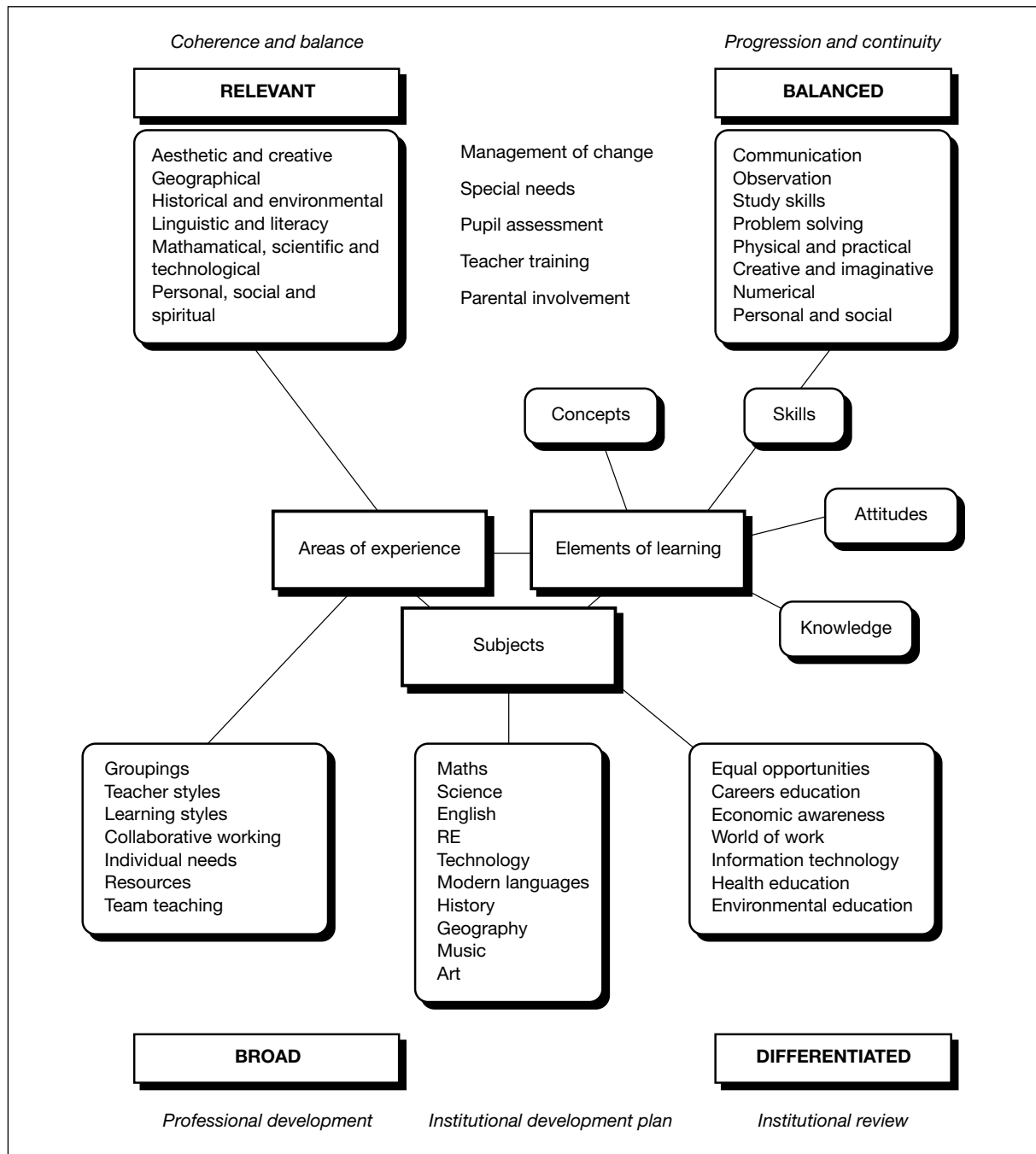
- what is required to improve performance
- how this will be done
- when this will be done.

### Checklist

#### Preparing a staff development policy

Activities important to establishing an environment favourable to CPD are:

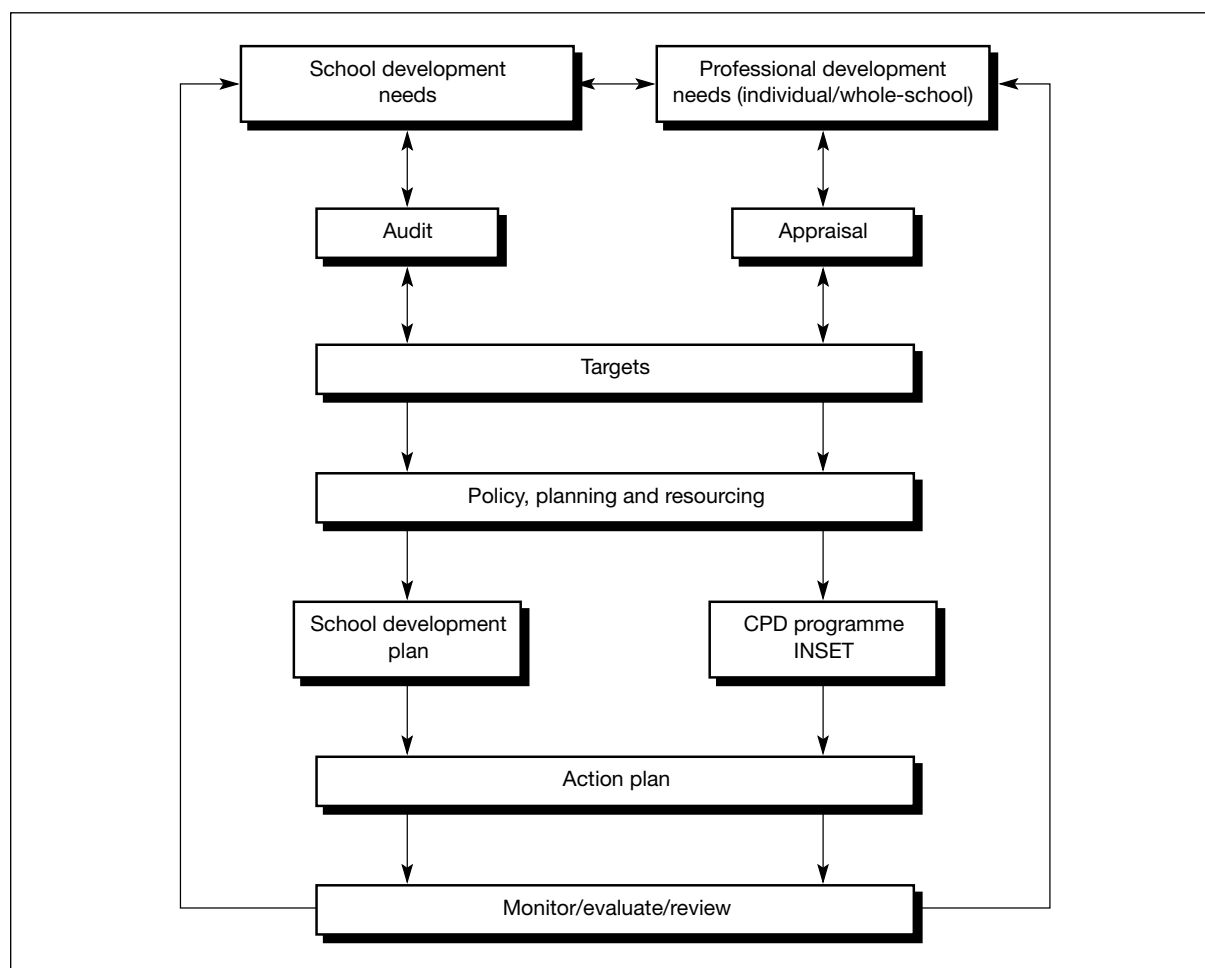
- the establishment of a positive professional development attitude by all members of the community of learners and acceptance of the idea of professional development throughout working life, i.e. lifelong learning
- instilling the need for continuous learning into new practitioners during their initial professional education and, ideally, establishing a synthesis of initial and continuing education
- enabling practitioners to learn effectively, i.e. by applying the knowledge of cognitive psychologists to the needs of the practitioner and professional development. Adult learning is about learning to learn rather than simply being taught
- providing expert support and guidance on professional development issues for all parties, and especially for practitioners.



**Fig. 2.2 Model for professional development within the context of school development**

Source: London Borough of Hounslow Local Education Authority

Figure 2.3 illustrates the relationship between school and professional development. Each process begins with an audit of practice and need, through the school auditing procedures and performance management. Targets are then set, based on identified needs. This leads to policies, planning and resourcing. Documents that are a record of policies, procedures and practices, the school development plan, and CPD/INSET programmes are then compiled. Action plans (see Workshop 4.1) provide the detail, identifying what needs to be done, by whom and when. The cycle is completed with monitoring, evaluation and review.



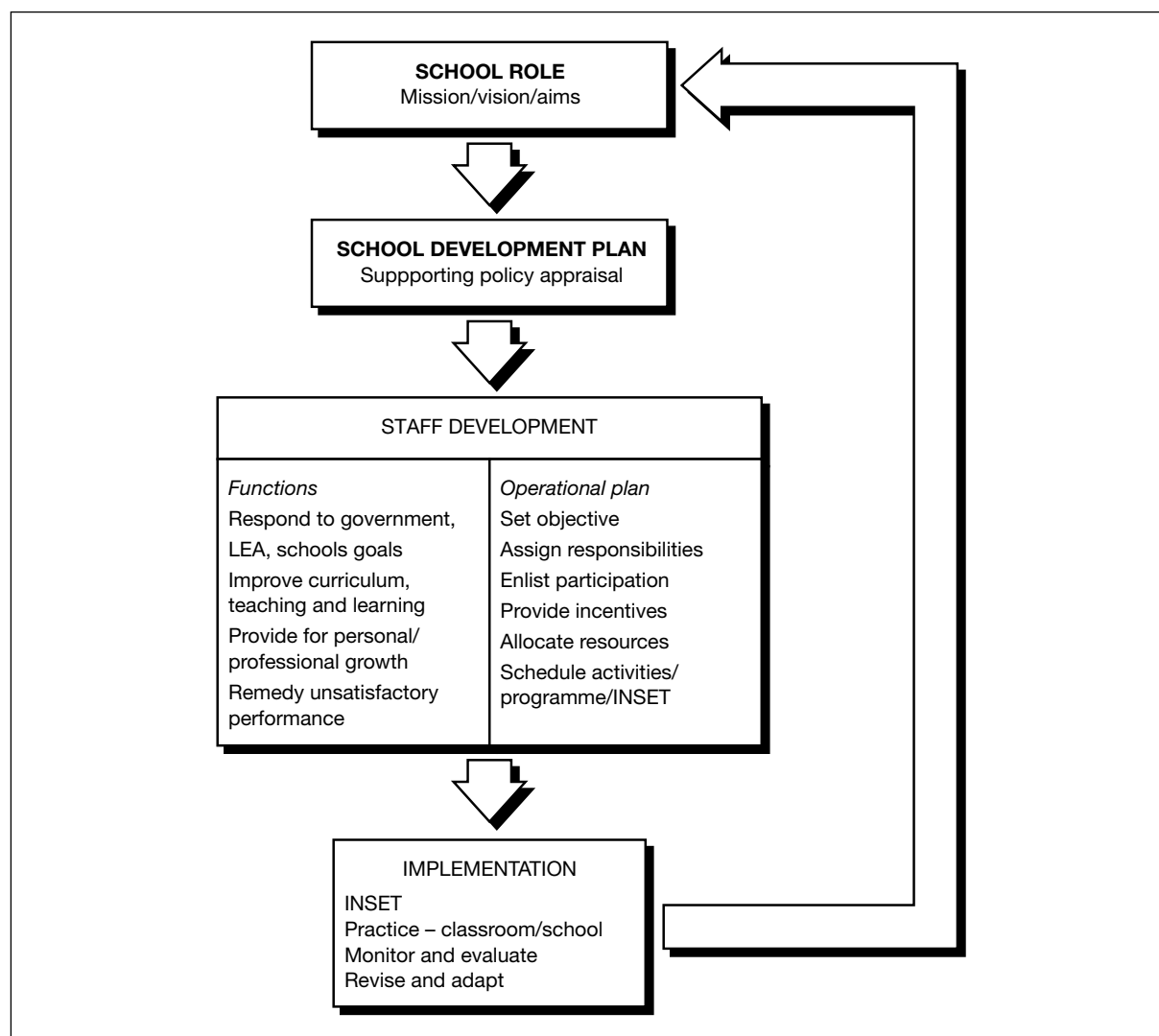
**Fig. 2.3 The relationship between school and professional development**

Figure 2.3 indicates that school development will not happen without the professional development of the individual and school as a community of learners. Recognition of this principle in practice is critical to the management of an effective and improving school.

A self-developing school will have targets that provide adequate time, resources and follow-up support for staff development. These will include:

- an emphasis on development of the individual within its own organisational context
- more individuals undergoing professional development
- professional development not isolated from other developments
- professional development related to the context of the school
- professional development about both individual and organisational needs
- professional development opportunities as the result of collaboration, participation and negotiation.

The model shown in Fig. 2.4 is based on American practice (NPBEA, 1993) and illustrates the process of school development planning which applies to both primary and secondary schools.



**Fig. 2.4 Planning staff development**

The model starts with the roles of the school, as stated in the mission, vision statements and aims. The school development plan (SDP) encompasses a supporting professional development policy that includes the performance management process. The model indicates how staff development responds to government, LEA and school goals in order to improve the curriculum, teaching and learning. Critically, staff development is shown to provide for personal and professional growth and to remedy unsatisfactory performance.

As an operational plan the model highlights the importance of setting objectives, assigning responsibilities, enlisting participation, providing incentives, and allocating resources to the need to schedule/plan professional development activities.

The model concludes with a section on implementation, impact on practice and the need to monitor and evaluate, revise and adapt as detailed in Section 10.

An example of good practice is given in Workshop 2.3 at the end of this section. Readers should consider how applicable the plan is to their own context. The strength of this example is the relationship between staff and school development. Senior managers have recognised the importance of professional development in the raising of standards in their school.

# MANAGEMENT AND LEADERSHIP

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School and staff development should also encompass the development of managers and leaders in primary and secondary schools. Within the context of department, year group, key stage and pastoral team development, professional development opportunities and needs should be identified.

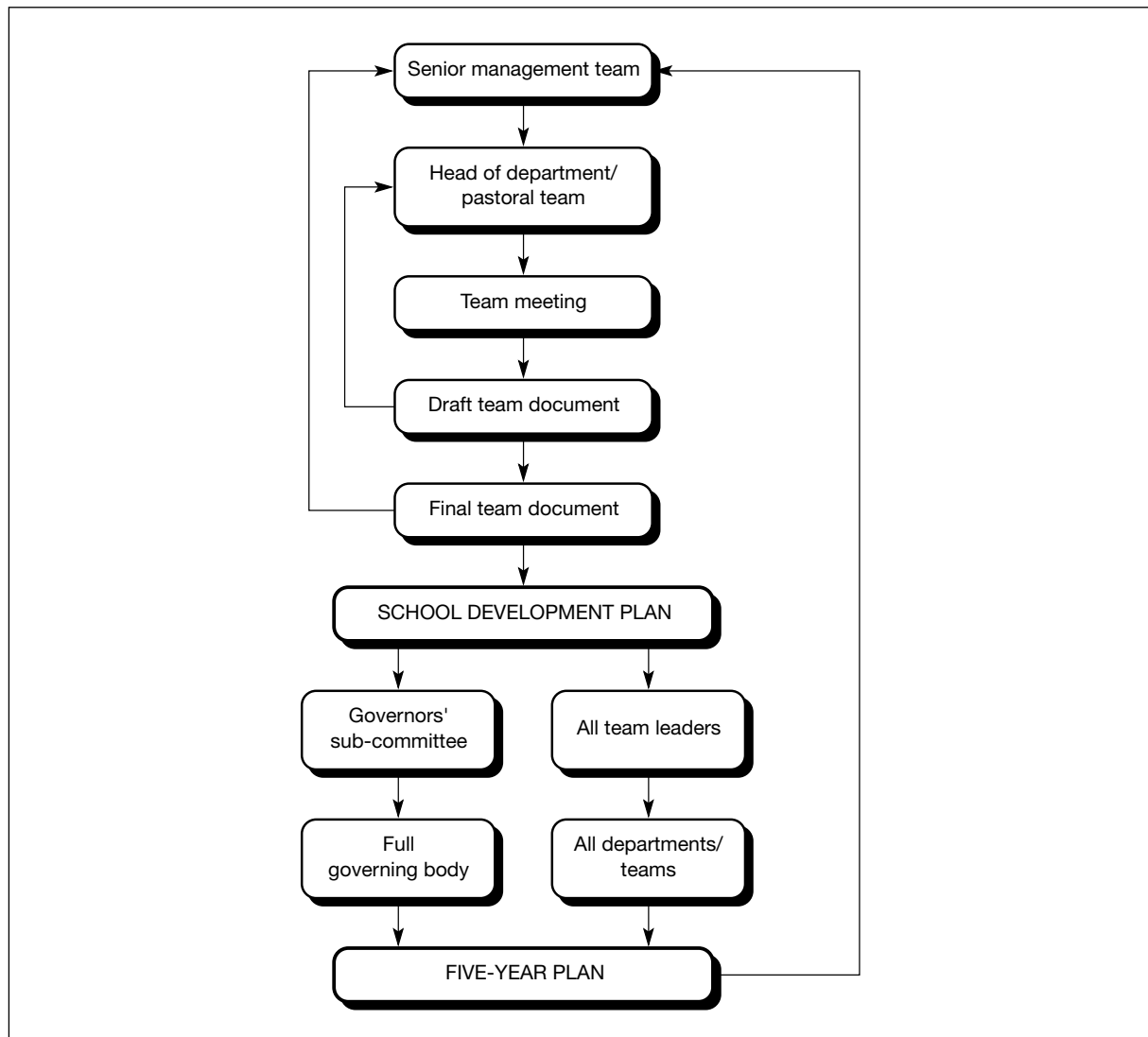
A middle manager and leader has responsibility for their team's development, as shown in Fig. 2.5. The figure illustrates how the team leaders' ability to identify and communicate team needs and development opportunities will influence school development. The process of planning for key stage, year, subject or department teams is itself developmental. Such initiatives will provide middle managers and leaders with the opportunity to develop planning, team-building and management skills.

A team development plan should include:

- aims and values
- schemes of work
- policy documents
- teaching and learning
- assessment and reporting
- special educational needs
- equal opportunities
- differentiation
- resources.

All staff should participate in:

- goal setting and needs identification
- policy making
- planning of programmes
- preparation and approval of programme budgets
- implementing
- evaluating.



**Fig. 2.5 Team development plan**

Figure 2.5 illustrates the relationship between subject teams, the school development plan and professional development programmes. Strategic planning is therefore central to the process of managing.

Strategic planning in all schools will occur annually through the school development plan. The value of a school development plan as an operational tool will rest with the senior management team (SMT). Middle managers, as West-Burnham (1994) indicates, will have greater involvement at the operational level.

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# Executive summary

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This section has introduced you to the principles, procedures and practice linking school development and professional development.

Key points to consider are:

- The tension that exists between school and individual requirements.
- The format for the school development plan.
- What is a professional development policy?
- How should school development and staff development be linked?
- The role of managers and leaders.
- What is good practice?

Performance management is defined and explained in the next section.
----------------------------------------------------------------------

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# Workshop materials

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## Workshop 2.1

### PREPARING A SCHOOL DEVELOPMENT PLAN

This exercise focuses on a whole-school approach to school development planning. It would take place during an INSET day and should be facilitated by an external consultant (LEA/HEI) with expertise in planning. The outcome should be shared aims leading to common practices.

#### **School development plan – raising achievement**

Aims:        To examine aims  
                 To examine teaching and learning styles/differentiation  
                 To identify areas of weakness in resourcing

Time:        1 hour

#### **Stage 1** (10 mins)

Brainstorm the context in which you are working (size of team/school/local authority). Consider all factors inside and beyond the school, and write these up on a flipchart

#### **Stage 2** (20 mins)

Divide into two groups. Look at the school aims. Write up on a flipchart what the aims should be. How can you implement these aims?

#### **Stage 3** (10 mins)

Share your ideas with your team/department

#### **Stage 4** (20 mins)

Discuss strategies for raising achievement through planning/completing tasks/teaching and learning styles. List them

## Workshop 2.2

### GUIDANCE ON POLICY DEVELOPMENT

#### **AIM – Raising achievement: improving standards of teaching and learning**

##### Objectives:

- |                                                                                                                                                                                              |     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| ● All subject departments will have placed differentiation at the head of their priorities, and plans for developing differentiation will have been fully funded as priorities in the budget | Y/N |
| ● The organisation of teaching groups in Year 8 will have been discussed and any changes implemented in the school timetable                                                                 | Y/N |
| ● A policy statement on equal opportunities will have been written and disseminated and will be reflected in practice                                                                        | Y/N |
| ● Assessment and reporting will have been reviewed to establish a system that shows progress, incorporates target setting and is motivating for pupils of all abilities                      | Y/N |
| ● A whole-school policy on language across the curriculum will be developed, tied in with the partnership project to raise reading standards at all ages and levels of ability               | Y/N |
| ● The curriculum at Key Stage 4 will have been reviewed and any plans to introduce vocational courses implemented                                                                            | Y/N |
| ● The curriculum in the Sixth Form will have been reviewed and any plans to extend curriculum 2000 courses will be implemented                                                               | Y/N |
| ● IT facilities in the school will be upgraded in the library, and made more accessible to pupils by extending opening hours, thus facilitating study support                                | Y/N |
| ● A rolling programme of updating and extending the stock of the library (books and IT) will begin.                                                                                          | Y/N |

#### **AIM – Raising achievement: improving standards of behaviour**

##### Objectives:

- |                                                                                                                                                                                                                                                                                                                                |     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| ● The Good Behaviour Policy will be published and become the basis of practice for all staff                                                                                                                                                                                                                                   | Y/N |
| ● Training in positive discipline strategies will be made available to a range of staff and disseminated                                                                                                                                                                                                                       | Y/N |
| ● Anti-bullying work will continue, advised by a group composed of parents, pupils and staff                                                                                                                                                                                                                                   | Y/N |
| ● Display areas will be created throughout the school and pupils' work and records of activities put on exhibition to make corridors reflect the life and ethos of the school                                                                                                                                                  | Y/N |
| ● Building and redecoration work will focus on improving the physical conditions for pupils in the school: cloakroom spaces converted into attractive social areas, lavatories and changing rooms refurbished and redecorated. The school council will be able to recommend spending up to £1000 on the fabric of the building | Y/N |
| ● Arrangements for home/school transport will be overhauled, with the emphasis on higher standards of behaviour on the buses and in the bus park                                                                                                                                                                               | Y/N |
| ● A professional counselling service will be made available to pupils.                                                                                                                                                                                                                                                         | Y/N |

## Workshop 2.2 (continued)

### **AIM – Raising achievement: improving school management and continuing staff development**

Objectives:

- A new and wider forum for discussion of the curriculum will have been established Y/N
- Opportunities for new responsibilities will have been offered at middle management level within the school for fixed periods, to retain flexibility Y/N
- Members of the senior management team will have been linked to all subjects to provide a clear line of communication, monitor standards and offer support Y/N
- All staff will have completed their first cycle of performance review and time to meet will have been made available Y/N
- A revised pattern of meetings will be introduced, increasing the number of 'task groups' and increasing the number of whole-staff, subject and year team meetings Y/N
- Management training courses for all interested teaching and support staff will have been arranged Y/N
- The standards set by Investors in People (IIP) will be used as a benchmark for the development of in-service training, planning and communication: the school should be ready for IIP assessment. Y/N

## Workshop 2.3

### CHECKLIST FOR SUCCESSFUL PROFESSIONAL DEVELOPMENT

According to the DfEE (2001a), successful professional development involves:

- a focus upon specific teaching and learning problems
- opportunities for teachers to reflect on what they know and do already
- opportunities for teachers to understand the rationale behind new ideas and approaches; to see theory demonstrated in practice; to be exposed to new expertise
- sustained opportunities to experiment with new ideas and approaches, so that teachers can work out their implications for their own subject, pupils, school and community
- opportunities for teachers to put their own interpretation on new strategies and ideas to work, building on their existing knowledge and skills
- coaching and feedback on teachers' professional practice over a period of weeks and months; this is a particularly important element, and can be decisive in determining whether changes in practice survive.

Use the above as a checklist – is your school a learning organisation developing the skills of a community of learners?



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## Section 3

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# PERFORMANCE MANAGEMENT

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Performance management is now central to professional development. The practice of teaching is to be developed by the community of learners that reflects a commitment to schools as a learning organisation. As Taylor (1986) explains, the development of teachers is complex:

*Several things are obvious from the start. Teaching is an art, not a technology. Detailed study and analysis, however careful, cannot generate comprehensive and situationally specific procedural rules which teachers can learn and then apply in order consistently to obtain a desired outcome. There is no single route to classroom effectiveness. Teachers know this. It is one of the reasons that makes them wary of proposals for evaluation and performance review which do not recognise the complexity of the teaching–learning relationship. It is here that detailed studies in the ethnographic tradition of how teachers work have been so valuable.*

Taylor's words are as applicable today as they were twenty years ago. They are a challenge to managers, team leaders and practitioners to engage in performance management in a professional and meaningful way. A more recent interpretation by the Hay Group (2000) states:

*The models, however, are not 'one size fits all'... Teachers achieve results in a variety of ways. This means that in any one group or cluster of characteristics described in the models, to be effective a teacher may need to demonstrate only some of the characteristics. The models therefore recognise that teachers are individuals, and the models provide practical, down-to-earth tools to use in real situations, rather than describing performance in ideal terms.*

This section will help you to:

- develop an understanding of performance management
- increase your knowledge of government policy
- consider advice on the performance review process
- reflect on past and future developments.



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## Chapter 9

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# WHY PERFORMANCE MANAGEMENT?

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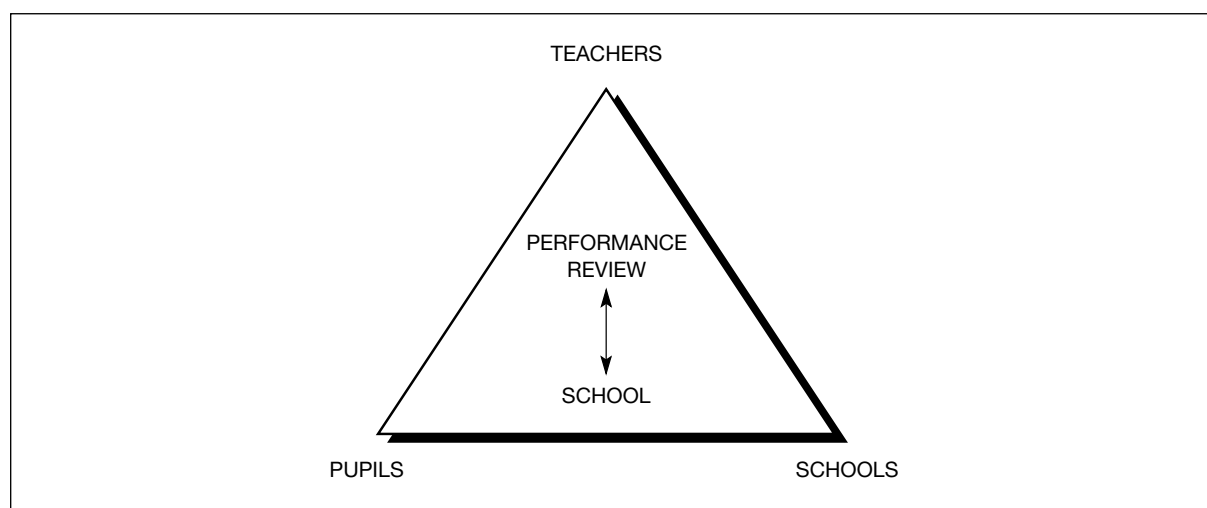
The professional context means that CPD is tied into performance management procedures and linked to school improvement as expressed in the school development plan (Pollard, 2002). This relationship provides the tension between the individual's needs and those of the school as an institution. Striking the balance is dependent on the situation.

Performance management is the formal procedure for ensuring that the staff, a school's greatest resource, is used to best effect to improve the quality of pupils' learning and the education that the school provides.

Through performance management, by developing knowledge and skills in a focused way, staff are encouraged and enabled to meet the needs of their class/subject/department and the school, and to fulfil their own potential and aspirations. If performance management is effective, teachers will:

- find it helpful and will welcome the recognition of their achievements as well as constructive criticism
- welcome the opportunity to consider their professional development
- appreciate the emphasis on teaching and learning.

Where best practice exists, professionals work together and, from their knowledge of the pupils in their care, decide what can be achieved and how best to achieve it, as illustrated in Fig. 3.1.



**Fig. 3.1 Performance review and school effectiveness**

Tomlinson (2002) explains:

*Policy is being driven by three concerns: The quality of teaching and learning in every classroom; the capacity of schools for self-generated continuous improvement, and the insistent theme of challenge and support with intervention in inverse proportion to success at every level.*

*... The best schools will be supported to lead the next wave of educational reform with new styles of partnerships. The main strategies are wide ranging:*

- *Three year innovation projects*
- *New models for delivering LEA services*
- *New employment flexibilities available for heads to use*
- *New roles for professionals working alongside teachers*
- *Schools providing a wider range of services including delivering some LEA services*
- *An expansion of the academy programme*
- *New external partners to support schools in long term difficulty and special measures*
- *The power to remove problem governing bodies*
- *Shifting attention towards a wider range of weak schools*
- *A reduction in barriers to schools working in partnership*
- *The best schools having more freedom to innovate, better schools having greater freedom to expand*
- *A more flexible and coherent 14–19 curriculum including elements that are more work based.*

# GOVERNMENT POLICY: THRESHOLD

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The threshold process sits within the government's framework for teachers' professional development. Beyond Qualified Teacher Status and induction, this process marks a significant stage in practitioners' career progression. The impact of this process has yet to be measured; case studies at the end of this section illustrate individual experiences of the process.

## BACKGROUND

Performance threshold assessment is part of a framework of national standards from Qualified Teacher Status (QTS) and induction to headship that provides a focus for teachers' career and professional development. Threshold assessment works alongside performance management arrangements and information from performance reviews – including information from classroom observation – which will increasingly provide an important part of the evidence to support threshold applications. Information from earlier appraisal systems may also be relevant.

*Performance management is about continuous improvements through reflective practice and meeting teachers' development needs. The governing body will decide how to spend its budget on the performance points over four pay scales; Main, Upper, AST and Leadership. The performance management policy and school salary policy will need to be aligned and clarify who makes pay decisions.*

Source: Tomlinson (2002)

## THRESHOLD STANDARDS

The following information is based on DfES, *Guidance on the Threshold Process in 2002 (Round 3) in England* (DfES, 2002a). To cross the threshold, teachers must demonstrate that they have met all eight of these national standards of effective teaching. The standards are grouped into five areas, which relate directly or indirectly to teaching and learning:

- **knowledge and understanding** (1 standard)
- **teaching and assessment** (3 standards)
- **pupil progress** (1 standard)

- **wider professional effectiveness** (2 standards)
- **professional characteristics** (1 standard).

The threshold standards embody the high professional expectations appropriate for experienced teachers. A teacher who is able to demonstrate effectiveness in each of these standards will be effective overall. This is summarised by the DfES (2002a) as follows:

*Effective teachers enable pupils to make **good progress** as a result of their teaching. In order to achieve this, teachers need to have good **knowledge** of the subjects they teach and a clear **understanding** of the educational initiatives and developments that impact on them and their pupils. They **keep up to date** in this knowledge and understanding and apply it in their **planning** of pupils' lessons, in their **teaching strategies** and in the **assessments** they make of their pupils' attainment. To facilitate all of this, effective teachers take appropriate responsibility for their **professional development** and **use the outcomes** to further **improve their teaching** and the **progress** their pupils make. Beyond, as well as within the classroom, effective teachers make an **active contribution to achieving the school's aims** and their actions reflect **policies that have been agreed**. They demonstrate those **professional characteristics** that have been identified as contributing to effective practice – in particular those relating to **high aspirations and expectations** for their pupils; to **inspiring trust and confidence** in pupils and colleagues and to **working collaboratively** for the good of the pupils and the school. They are constantly **striving to improve** their practice.*

The document states that teachers applying to cross the threshold will be assessed against these national standards. The assessment will be based on evidence of performance with a principal focus on teaching in the classroom.

In order to meet thresholds requirements, teachers are encouraged to build an evaluative record of practice for several years, which will reflect:

- the learned ability to reflect and assess self-competence
- the resolve to work to self-imposed targets
- the intellectual rigour to make appropriate decisions
- the willingness to accept and act upon well-founded advice
- the readiness to learn from mistakes
- the determination to seek success
- the acceptance of personal responsibility
- the skills, knowledge and understanding to fulfil expectations
- the resourcefulness to accept responsibility for self-improvement
- the ability to be self-motivating
- the maintenance of standards appropriate to the profession.

From the above, teachers are expected to take more and more responsibility for their own professional development and to be able to improve their own teaching by evaluating it, learning from the effective practice of others and from evidence.

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## Chapter 11

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# THE PURPOSE OF PERFORMANCE MANAGEMENT

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The purpose of performance management is to motivate and develop individuals. A reviewer is involved in identifying a colleague's strengths and weaknesses, and the setting of targets that are attainable. Review is an audit or an evaluation leading to performance-related rewards or sanctions, and staff development opportunities.

The primary purpose of the review process is performance enhancement. An outcome of the review process should be an action plan that identifies specific targets and training needs. In sum, performance management and review should improve the quality of education for pupils, through assisting teachers to realise their potential and to carry out their duties more effectively.

### Checklist

#### What is the purpose of performance review?

The purpose of performance review is:

- to raise standards through target setting that enhances teacher and headteacher performance, and to improve provision for pupils, teachers and headteachers
- to link the review cycle to:
  - LEA education development plans
  - school management procedures
  - OFSTED – action plan
  - annual reviews and development plans
  - individual development plans
  - induction and assessment
- to plan the professional development of headteachers and teachers within the national and LEA framework: INSET (Standards Fund), Teacher Training Agency (national standards) and DfES initiatives.

A working definition of performance review is: *one professional holding themselves accountable to themselves in the presence of another professional*. Review improves the management of teaching and learning within the classroom by helping staff and headteachers identify ways of enhancing professional skills and performance and supporting them in the identification of achievable targets.

Performance review should assist in planning the professional development of staff individually and collectively within the framework set by the school development plan with reference to their role and function within the school. This would enhance the overall management of the school and provide an opportunity to consider the effective management of change. Performance review should also support the promotion of equal opportunities.

To this end a staff performance and management review scheme should be a process that is open and based on the mutual understanding by all staff of its context, purpose, procedures, criteria and outcomes. The process and procedures adopted should be fair and equitable and should be seen to be so, both in general and by respecting equal opportunities, particularly in relation to gender and race.

The process and procedures supporting performance review should also be acceptable to all staff, headteachers, governors and LEA personnel. All should benefit from participation in the scheme. There should be the opportunity for objective judgements to be made concerning the management of the institution.

At all times the scheme should aim to avoid unnecessary bureaucracy and time-consuming administration by the maximisation of available resources and the use of data from a range of sources. It should be integral to the institution's development strategy and attempt to balance the demands of professional development and public accountability.

A rigorous system of review is one that raises standards, key elements of which are:

- trust
- training
- resourcing
- time
- support
- commitment.

For performance management to have any meaning it should be seen to inform the institutional development process. To this end, institutions should aim to have in place a co-ordinated procedure for ensuring that:

- mechanisms exist for collating professional development needs identified through individual reviews
- there is co-ordination of training needs and related development opportunities
- there are contingency plans for coping with those whose performance is perceived as poor for a variety of reasons, e.g. stress, lack of skills.

## **ISSUES**

Care should be taken in the initial presentation of performance management to practitioners. Trust should be developed through a process of consultation with all participants as to the design of the scheme. A clear statement of aims should be made, as

well as of the means of achieving them. Effective training and professional development should be provided to support the scheme, including the use of professional development training days for all participants.

Since the introduction of teacher/headteacher performance review, many practical issues have emerged that a manager needs to consider when implementing performance review. Specifically, training for appraisers needs to be near the point of implementation and greater emphasis is needed on higher-order skills training. There is also a need for an evolving pattern of guidance and documentation by the LEA. Critically, priority should be afforded to performance review in the context of the OFSTED inspection system, linking individual targets to school development. Guidelines are required on linking performance review to school development planning and school improvement.

Issues arising from practice are:

<i>Resources</i>	Time and human Funding to support process and outcomes
<i>Who appraises whom</i>	Who selects/allocates reviewers Involvement of governors Support to reviewers' team
<i>Timing</i>	Duration of review cycle
<i>Frequency</i>	Recommended only one review interview per day
<i>Consistency</i>	Monitoring (school-based) Monitoring (LEA-based)
<i>Records/reports</i>	Ownership Duration Accessibility and confidentiality (LEA, governors)
<i>Outcomes</i>	Follow-up Additional support system
<i>Appeals</i>	School system LEA system

# THE REVIEW PROCESS

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Performance management needs to be set in the context of other initiatives to raise standards in schools. Local education authorities have a particular involvement with schools that are running into real difficulty, but will consult with all schools in the setting of targets as they draw up their educational development plans (EDPs).

As performance review becomes an annual process, there will be an opportunity to agree targets with teachers in the light of targets set by the school in the development plan, which will itself be influenced by key points for action in OFSTED reports and benchmark information from national data collected by OFSTED and the LEA's EDPs.

### Checklist

#### Performance review – what is required?

The management of performance review requires:

- implementation plan for performance review scheme
  - statement of aims of scheme
  - organisation of scheme
  - timetable/duration of cycle/frequency
  - documentation of scheme
  - personnel
  - resources
- school development plan
  - process/cycle
  - availability/accessibility
- job description
- equal opportunities
  - awareness of staff issues
- staff development policy
- professional development
  - co-ordination
  - resources.



The developing work of the TTA on professional standards may also lead to agreements about appropriate targets for particular points in a teacher's career. It is important that any changes to appraisal systems cut down rather than increase bureaucracy and have the improvement of pupils' performance as a constant focus.

McCall and Lawlor (2002b) have developed a comprehensive checklist for performance management (PM).

### **Checklist**

#### **Performance management – key roles for department heads and team leaders**

##### Strategic/planning:

- examine suitability of organisational structure for achieving PM objectives
- develop sense of purpose and dovetail with school's mission statement and SDP
- facilitate decision making on how best to use team's skills
- examine potential areas for role conflict and clarify key roles and responsibilities
- organise performance reviews
- negotiate and set professional development objectives
- agree team response to those objectives that can be shared
- agree joint working practices.

##### Support:

- lead by example
- emphasise interdependence of individual, team and school development
- establish a forum where views and advice on teaching and learning can be explored regularly, openly and frankly
- provide stimulus and challenge about individual and collective professional practice
- encourage dissemination of good practice
- engage regularly in debate about how staff can work together
- involve individuals in planning and identifying their development needs and opportunities
- set these in context of overall career plan – not just PM and threshold assessment.

##### Monitoring and evaluation:

- produce subject, departmental or key stage policy on assessment, marking, recording and reporting – in line with school guidelines
- discuss/provide clear information on how teaching, learning and general professional work will be reviewed and evaluated
- use established criteria to help with review and evaluation – e.g. national standards; research on teacher effectiveness; relevant inspection/self-evaluation indicators
- set targets for each teacher
- encourage self-review

- focus feedback on strengths and what must be done to improve practice
- agree next work schedule and incorporate into professional development plan.

As team leader what do I do well? What do I need to improve?

Key words/phrases: appreciate, be objective, build rapport, challenge, clarify, coach, collect evidence, decide/write targets, demonstrate effective leadership style(s), fit for purpose, negotiate, plan, reflective listening, resource management, team building, time management, work with others.

*Source: McCall and Lawlor (2002b, pp. 43–4)*

After management issues have been considered, the process of review involves the following:

### **Initial meeting**

- the purpose
- date, time and venue for performance review interview
- date, time and focus of classroom observation
- objectives of the interview
- data collection/instruments to be used
- what information is to be collected
- who is to be approached
- information to be available to appraisee prior to the interview.

### **Staff self-performance review**

- use of prompt sheet to support self-reflection on performance/role.

### **Classroom observation**

- total of 1 hour on two or more occasions
- specific focus: details of class/group work being carried out, teacher plans and preparation
- questioning techniques
- agreed methodology/format.

### **Debriefing following observation**

- relevant data used to inform discussion, 'teaching analysis' within two weeks.

### **Collection of any other relevant data**

- pupil-related, non-teaching duties
- curriculum-based
- carried out within half a term
- relevant to past year's work
- opportunity for feedback from areas of additional responsibility
- data compiled during action research.

### **Review interview**

- clear agenda
- comfortable environment
- uninterrupted
- adequate time
- sharing documents prior to meeting
- consideration of job description
- review of work
- identification of successes, areas of development
- identification of constraints
- identification of expectations
- professional development needs
- identification of targets
- only one interview per day
- atmosphere of confidentiality and trust
- nature of previous relationships
- high priority by both parties and others.

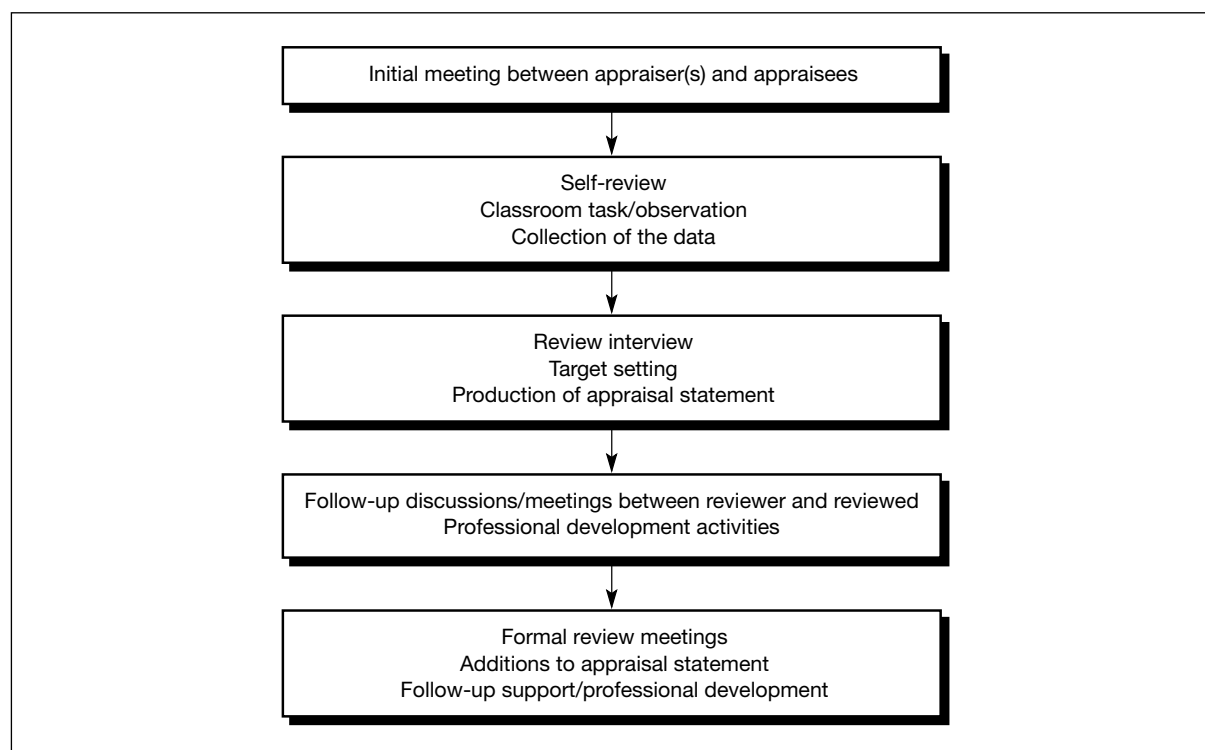
### **Preparation of a statement**

- recording main points – achievements, success and good practice
- deficiencies, weaknesses and suggestions for dealing with them
- requests for help and support
- suggestions for professional development
- comments about matters affecting individual's work.

### **Agreed targets**

- should be stated clearly
- should take the form of an action plan
- should be few in number
- should be challenging but attainable
- should be monitored and reviewed
- targets connected to: classroom strategies, school performance, career/professional development.

Review should cover the full range of professional duties, including temporary responsibilities. The basis of performance review should be the individual teacher's job description, which should reflect the balance between work in the classroom and other duties. Figure 3.2 illustrates the review process.



**Fig. 3.2 The review process**

## TARGETS

In the performance review meeting the teacher and the team leader agree three or four targets for the teacher for the coming year. These should be linked to whole-school targets and department/subject targets. There may also be targets linked to areas of responsibility and personal professional development (see Table 3.1).

Targets linked to	Training	
	Planned by	Delivered through
Whole school	SMT CPD co-ordinator	INSET days Staff meetings Conferences
Subject or department	Subject leader or head of department	Department meetings Conferences
Area of responsibility	CPD co-ordinator	Range of activities
Personal professional development	CPD co-ordinator	Range of activities

**Table 3.1 Linking targets**

*Source:* Lillyman (2002)

## Checklist

### What are the outcomes of a performance review scheme?

The outcomes of a performance review scheme for members of staff should be:

- raising standards
- better understanding of the job
- improved feedback and recognition
- opportunity to review regularly professional development needs
- increased accuracy of references
- greater awareness of career development factors and opportunities
- support for work-related issues
- greater job satisfaction.

For the institution:

- raising standards
- institutional aims and staff aims co-ordinated
- priorities clarified and determined
- staff clarity about roles and responsibilities
- professional development of management
- institutional needs met through target setting
- improved communication
- greater exchange of ideas
- a more supportive environment.

The following case studies of performance-related progress illustrate the process in practice.

## **Case study 12.1**

### Performance-related progress

In our school, in recent years we have not had appraisal, but have done performance management instead. There was initially no intention that it would in any way be linked to pay, but instead would be a record of good practice for staff so that they had a record of their achievements. With the establishment of the threshold and the levels beyond it, my head felt it would be a useful form of good practice and would provide the evidence for staff to pass through the threshold and beyond.

I had my performance management review in August. As I teach mainly exam classes we looked at any available results. The A Level results were as expected (one A and four Bs) and the head asked me how I had tracked the progress of the group. I was able to explain that I had done an analysis of the Year 12 results, (as I always do) and from that had been able to 'guesstimate' their final result. As we had not entered pupils for the new exam before and only had one specimen paper to use, it was very difficult to judge exactly how they would do. The synoptic paper in particular was the great unknown.

We also looked at the AS results for 2002 and agreed that pleasing as they were (four As and two Cs) it was worrying that some students were doing so well, because I know that one girl in particular is not very academic and I do not want her to have a false idea of how well she will do at A2.

The GCSE results at this stage had not been published and the head decided he did not need to look at last year's although I had the relevant data. We also talked about performance related target grades and how they had been set for Year 10, all of whom do GCSE RS.

Finally my head asked about how I supported the staff in the department. I explained how I sometimes move people out of groups to help them, how I will mark work they are unclear about and how we plan assignments together. I have set up the assignment for the present Year 11 although I won't be at school by the time they do it.

I also copied all my A Level notes and files and left them with colleagues, so that they will be able to teach their part of the A Level without any problem.

*Source: Head of Department, Comprehensive School*

## Case study 12.2

### Target setting

Peter is an excellent teacher – conscientious, hardworking, has good discipline, prepares lessons well and marks books with care and regularly. As he is basically a model of good practice I needed to find something that would 'stretch' him. Last year I set targets for Peter that would enable him to improve his experience in school generally. One was that he had to teach some Sixth Form RE. He taught the general RE for the Sixth Form and although it was a success he didn't enjoy doing it because there is quite a lot of hassle attached to the organisation (or lack of it, over which we have no control). He said he didn't wish to teach it this year.

I set him a target of teaching some A Level alongside me because I felt that after five years of teaching he should do this. He was not keen but agreed.

At the previous performance management meeting, we agreed he would target specific pupils with a view to improving their likely performance at GCSE. We reviewed their progress and agreed that he had been successful. We also said that he should attend a GCSE

training day. It has not yet been possible for him to do this because school would only let one of us go and he felt it should be me. (I gave him the option of going.) He will fulfil this target next year.

*Source:* Head of Department, Rural Comprehensive School

The workshop materials presented at the end of this section provide further guidance and advice on preparing for performance review.

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# Executive summary

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This section has introduced the process of performance review. Key points to consider are:

- Performance review is central to school effectiveness
- The purpose of performance review is to raise standards through planned individual development
- Performance review should enhance school development
- Target setting is required if performance review is to be developmental
- Performance review will lead to positive outcomes for individuals and their schools.

The following section will focus on the important task of co-ordinating professional development in school.



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# Workshop materials

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3.1	Guidance on producing a Professional Development Record	65
3.2	Job description	67
3.2	Self-review prompt sheet	71
3.4	Data collection – classroom observation	72
3.5	Debriefing: feedback	73
3.6	Interview	74
3.7	Review statement: progress report	76
3.8	Target setting	77
3.9	Professional Development Record	79

The workshop materials for this section provide you with worked examples of good practice and guidance for the review process. Workshops 3.1–8 require little introduction; each example includes statements and lists applicable to primary and secondary schools.

## Workshop 3.1

### GUIDANCE ON PRODUCING A PROFESSIONAL DEVELOPMENT RECORD

#### What is a Professional Development Record?

A Professional Development Record (PDR) is a confidential and voluntary collection of material that records and reflects your work. It is a way of using past experiences and present activities to demonstrate and reflect on skills learnt, to identify future learning needs and priorities, and to inform and plan prospective development. It provides a mechanism, together with your performance review, for thinking about your practice in a planned and systematic way. A Professional Development Record links across all the Department's Continuing Professional Development (CDP) initiatives including the *Teachers' Standards Framework*, which provides a 'starting point' for teachers to recognise the diverse skills they have already and may require at different stages in their career. The Framework enables teachers to plan training and development to make the best use of their talents within the teaching profession and to stimulate the development of a learning community. The Professional Development Record builds on existing good practice in the profession that ranges from career entry profiles to individual school and management development logs.

The first part of a Professional Development Record contains evidence of 'achievements' such as certificates, qualifications, relevant courses attended, posts held and particular responsibilities. The second part is a 'developmental PDR' section where you can:

- record your experience, skills and attributes
- record your learning and development
- reflect on your teaching and learning
- analyse your strengths and areas for further development
- set learning priorities and plan your future.

#### Why have a Professional Development Record?

To prepare evidence for:

- a job interview
- a threshold or Advanced Skills Teacher (AST) application, etc.
- a performance review meeting
- possible accreditation of learning

### Workshop 3.1 (continued)

To plan for your career by:

- recording your career history
- collecting evidence of your current achievements
- showing skills and/or improvement in areas such as team building, working together, motivating people, self-confidence
- reflecting on your progress and learning as a teacher

To plan your training and development by:

- reflecting on your teaching and learning
- analysing your strengths with a colleague or mentor
- identifying and targeting learning and development opportunities having used the *Teachers' Standards Framework* planning for qualifications.

Source: DfES (2001b)

## Workshop 3.2

### JOB DESCRIPTION

#### Generating job descriptions

Central to an effective scheme for staff review is the preparation of job descriptions. Job descriptions should:

- be jointly discussed
- cover all aspects of the individual's work
- state precisely to whom the individual is accountable
- be broken down into areas of specific responsibility
- be open-ended and support development.

To be of value, a job description should include:

- appropriate personal specifications (e.g. qualifications/experience)
- job title
- a statement of the primary function of the job that is clear but brief as to the overall role of the job holder
- a statement of line responsibility, which clearly specifies to whom the job holder is responsible and for whom the job holder is responsible
- a detailed statement of the main duties, which could be broken down into subsections and which may be used as a checklist to ascertain if the job holder is performing the job satisfactorily.

#### Writing job specifications

When undertaking a job analysis, the following checklist will help:

##### **Checklist**

##### **Job analysis**

1 Key words:

- What is done?
- When is it done?
- Why is it done?
- Where is it done?
- How is it done?

(Answers should include teaching and managerial details.)

## Workshop 3.2 (continued)

### 2 Responsibilities:

- responsibility for others – pupils and teachers
- responsibility for resources
- responsibility for budgets.

### 3 Working relationships:

- relationships with superiors
- relationships with colleagues
- relationships with other departments and agencies
- relationships with pupils
- relationships with parents
- relationships with team members.

### 4 Job requirements:

- skills and experience
- education and training
- health
- motivation and social skills
- personal qualities.

### 5 Working conditions:

- the school
- the department/team
- social conditions
- funding and pay.

### 6 Check-up:

- check with the job holder
- check with their manager.

## Workshop 3.2 (continued)

From the job analysis, a job description can be written. This should describe the job, what the job holder is responsible for and what they will be required to do. An example of what to include is given below:

### **Checklist**

#### **Job description**

Job title:            Middle manager/team leader

Grade:

Responsible to: Headteacher

A Summary of main responsibilities and activities

- subject area
- examination/pastoral
- age range
- ability range
- special needs
- budgets
- inspection.

B Specific responsibilities

- staff
- materials
- resources.

C Working conditions

- school/LEA
- room.

An example of current practice, which describes a middle management post in a primary or secondary school, is shown on the next page.

## Workshop 3.2 (continued)

### Job description for head of department/team leader

- 1 Leadership of a team of teachers, including supervision of newly qualified teachers (NQTs) and student teachers, subject to agreement with deputy headteacher
- 2 To ensure that the team of teachers meets regularly according to the school calendar and is made aware of the school's policies
- 3 To ensure that the syllabus and schemes of work are being followed by members of the subject team and that agreed school standards of work and behaviour are adhered to
- 4 To become familiar with the work being done by team members, to visit classrooms where practicable, to check pupils' work regularly and to ensure that homework is being set in accordance with the published homework timetable and is regularly marked
- 5 To be the first person approached in cases of indiscipline within the classroom and to support staff in dealing with difficult pupils
- 6 To monitor the presence of staff at the times and places prescribed and to check that there is a punctual start to lessons
- 7 To be responsible for the allocation of pupils to sets where appropriate and to allocate classes to teachers, ensuring that colleagues have the opportunity to teach a cross-section of ages and abilities, where appropriate
- 8 To be responsible for the submission of lists of candidates for examination, together with estimated grades
- 9 In consultation with the senior management team to arrange timetables, aid the supervision of students and take an active part in ensuring that NQTs are carefully supervised during their first months of service
- 10 To be responsible for the spending of capitation in consultation with their team and to keep a stock book as required by the headteacher
- 11 To ensure that details of all learning resources are available to the whole team, and to account for apparatus, equipment and stock in their charge
- 12 To supervise pupils' assessments and school reports prepared by members of the subject team
- 13 To participate in the selection and performance review of teachers
- 14 To liaise with other subject areas, especially in respect of pupils with special needs, and thus support the co-ordination of topics delivered in more than one department, as well as encouraging others in cross-curricular work where appropriate
- 15 To ensure that representatives are allocated to and attend working groups as necessary
- 16 To represent the team at relevant meetings, and at other times when so requested.

### Workshop 3.3

## SELF-REVIEW PROMPT SHEET

The following prompt sheet enables you to detail the effectiveness of your teaching. The key is to be honest when completing the form. Discuss the outcomes with a colleague.

Self-review prompt sheet	
<p>Date:</p> <p>Lesson:</p> <p>Lesson plan (include all details):</p>	
Targets:	Record of time taken:
Comment/analysis:	
Action points:	



## Workshop 3.4

### DATA COLLECTION – CLASSROOM OBSERVATION

Another key component in the review process is classroom observation. During the observation it is important for the reviewer to concentrate on the prearranged aspects of the lesson (i.e. the agreed focus). They should record observations accurately, record data systematically and maintain the agreed relationship with pupils/teacher. It is important that the reviewer is objective, defers judgement as appropriate and gives an immediate response to the practitioner and thanks them on leaving the lesson. This is followed by a feedback session, which should take place as soon after the observation as possible, in a quiet and informal atmosphere.

#### Checklist

#### Key questions – observation

Yes /No

Have you:

- concentrated on the prearranged aspects of the lesson (i.e. the agreed focus)?
- recorded observations accurately?
- recorded data systematically?
- maintained the agreed relationship with pupils/teachers?
- been objective and deferred judgement?
- given an immediate response and thanks on leaving the lesson?

## Workshop 3.5

### DEBRIEFING: FEEDBACK

The feedback session should:

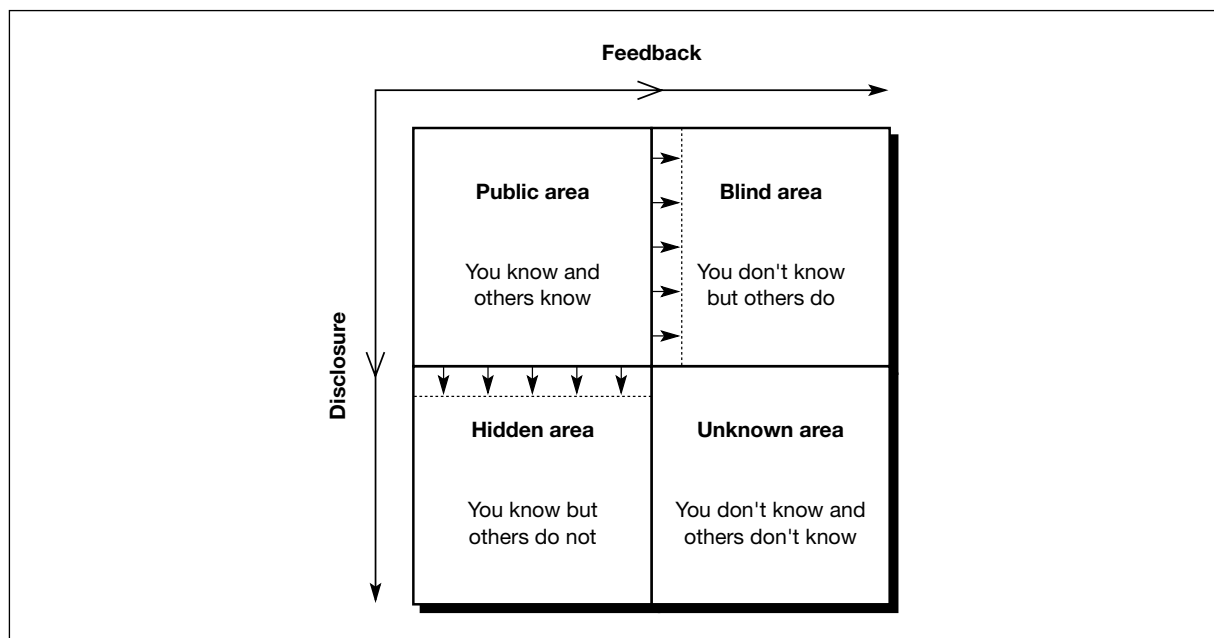
- take place as soon after the observation as possible
- be in a quiet and informal atmosphere.

The appraiser should:

- allow the teacher to present an account and analysis whilst engaging in active listening and avoiding interruptions
- then present the collected data and discuss their implications with the appraisee
- encourage the teacher to identify areas for development and possible targets
- conclude with an agreed written statement of the action to be taken.

Figure 3.3 illustrates the Jo-Hari Window, in which the 'panes' within the frame represent all that is known about us, either by ourselves or by others. Self-awareness is increased when we are successful in penetrating the 'blind' area but also when, through sharing more of ourselves with others, we begin to reduce the 'hidden' area and thereby appreciate the greater potential in our own lives. To increase awareness of ourselves we need to pursue experiences that:

- provide opportunities for disclosure
- provide opportunities to receive feedback on our own behaviour.



**Fig. 3.3 The Jo-Hari window**

## Workshop 3.6

### INTERVIEW

The reviewer will need to be trained to develop the key skills of interviewing, which are: listening, questioning, analysing, summarising and reflecting, clarifying, giving and receiving feedback, problem solving and target setting.

The review interview should:

- involve detailed consideration of the job description of the teacher
- review the appraisee's work, including successes and areas of development, with reference to the data collected and the classroom observation
- identify and discuss professional development needs
- discuss career development as appropriate
- discuss the appraisee's role in and contribution to the policies and management of the school
- identify any constraints that prevent the appraisee from fulfilling their role and function
- identify targets for future action and development
- clarify the points to be made in the performance review statement.

The kind of information required largely determines the type of questions selected in the performance review process. For example:

Open	to encourage another person to explore matters of importance to them
Reflective	to encourage someone to explain their feelings or attitudes on an issue
Hypothetical	to encourage someone to step outside their current position, mental set or attitude and consider a matter from another standpoint
Closed	to gather very specific facts or obtain yes/no answers
Probing	to keep the person on the same topic but explore it in more depth.

## Workshop 3.6 (continued)

### **Checklist**

#### **What are the key skills of interviewing?**

The key skills of interviewing include:

- listening
- questioning
- analysing
- summarising and reflecting
- clarifying
- giving and receiving feedback
- problem solving
- target setting

### **Checklist**

#### **What are the key skills of active listening?**

The key skills of active listening are:

##### **Establishing the right conditions:**

- environment
- proximity
- orientation
- posture
- gesture
- eye contact.

##### **Reflecting:**

- Conveying to the practitioner that they are understood

##### **Getting the practitioner to talk:**

- invite
- encourage
- question
- silence.

##### **Following:**

- paraphrase
- summarise

## Workshop 3.7

### REVIEW STATEMENT: PROGRESS REPORT

The review should allow the teacher to present an account and analysis whilst engaging in active listening and avoiding interruptions, then present the collected data and discuss their implications with the practitioner, encourage the teacher to identify areas for development and conclude with an agreed written statement of the action to be taken.

<b>Review statement: progress report</b>	
<b>Strengths</b>	<b>Weaknesses</b>
1	1
2	2
3	3
4	4
5	5
<b>Areas for development</b>	<b>Action</b>
1	1
2	2
3	3
4	4
5	5

## Workshop 3.8

### TARGET SETTING

Target setting is a critical part of the performance review process. A target is a statement of intent agreed by two or more people which refers to a desired state of affairs to be achieved in the future. In most circumstances it will concern a change resulting in an improvement of some kind. Therefore targets should:

- aim to facilitate the teacher's own professional development
- be agreed in the context of the school's development plan and organisational goals
- be feasible and realistic in the light of available resources
- include some agreed performance that will help to illustrate the extent to which the target is being achieved
- be few in number
- include some indication of the support the appraisee will require/receive in order to achieve the target (the appraiser should accept responsibility for ensuring that support is provided)
- be reviewed in the follow-up meetings and modified as necessary.

#### Checklist

##### How to present agreed targets

Agreed targets should be:

- stated clearly
- linked to an action plan
- few in number
- challenging but attainable
- monitored and reviewed
- connected to: raising standards, classroom/management strategies, school performance, and career/professional development.

#### Checklist

##### Setting targets

- Set realistic quantitative targets
- Set appropriate targets that are designed to improve the quality of pupils' learning
- Devise strategies to achieve them
- Allocate responsibility
- Ensure that everyone is committed to playing their part
- State the criteria against which you will judge your success.

## Workshop 3.8 (continued)

### **Checklist**

#### **A guide to target setting**

- S – Specific
- M – Manageable
- A – Appropriate
- R – Realistic
- T – Time-constrained
- I – Informative
- E – Evaluated
- S – Stimulating

*Source: Turkman (1965)*

## Workshop 3.9

### PROFESSIONAL DEVELOPMENT RECORD

#### PROFESSIONAL DEVELOPMENT TRAINING RECORD

Name \_\_\_\_\_

#### PRE ACTIVITY PLANNING (to be discussed with the team leader)

1) Aspect of the job affected:

Class teaching in \_\_\_\_\_

Management responsibility for \_\_\_\_\_

Other \_\_\_\_\_

2) Professional development activity planned (e.g. course, work shadowing, INSET day, obtaining additional qualifications)

Date \_\_\_\_\_ Duration \_\_\_\_\_

Venue \_\_\_\_\_ Led/run by \_\_\_\_\_

3 What do you expect to learn from this activity? (What knowledge, skills or understanding do you hope to acquire?)

4) Do you want any support during this activity?

Cover \_\_\_\_\_

Preparation/examination time \_\_\_\_\_

Resources \_\_\_\_\_

Other \_\_\_\_\_

5) What impact do you hope that this learning activity will have on your work?

Make appointment for post activity review: \_\_\_\_\_



### Workshop 3.9 (continued)

#### POST TRAINING REVIEW (To be discussed with the team leader)

6) If you attended a course:

Was it helpful?	Very/quite/not very/totally unhelpful
Was it well presented?	Very/quite/poorly/very poorly
Was it well organised?	Very/quite/poorly/very poorly
Would you recommend this course to others?	Yes/no
Was the venue appropriate? (Convenient, comfortable, good food, well equipped?) Give details if you wish:	Yes/no

7) *Have your expectations of this activity been met?*

Was it an effective way of learning?

8) What are the key things that you learned from this activity?

i) \_\_\_\_\_

ii) \_\_\_\_\_

iii) \_\_\_\_\_

9) What impact will this learning have on your practice? What will you do differently?

10) How will you measure your success?

11) Do you need any support to achieve this?

Make appointment for final review:

## Workshop 3.9 (continued)

### ***FINAL REVIEW***

Date \_\_\_\_\_

With whom \_\_\_\_\_

12) How successful have you been in achieving your targets as set out in sections 9 and 10 above?

13) How useful was this professional development activity in helping you to achieve this?

Source: Lillyman (2002)



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## Section 4

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# CO-ORDINATING PROFESSIONAL DEVELOPMENT

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The role of the professional development co-ordinator in primary and secondary schools has changed as a consequence of government policy and legislation. The emphasis on professional practice requires a developmental approach. This section focuses on the elements in co-ordinating professional development, which are based on the key principles underpinning the government's guidelines for continuing professional development, including:

- equality of opportunity
- teachers' ownership of their development
- learning for good practice.

This section provides guidance for professional development co-ordinators on:

- understanding the professional development context
- understanding the role of a professional development co-ordinator
- how to manage the professional development process
- considering learning styles
- measuring impact on practice
- preparing action plans.

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## Chapter 13

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# CO-ORDINATING PROFESSIONAL DEVELOPMENT: THE CONTEXT

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Effective and improving schools require the effective management of continuing professional development (CPD). In practice professional development co-ordinators have limited training and, therefore, limited expertise in the guidance of their colleagues.

*Professional development of any kind needs to make a contribution to the individual and through that contribution to impact on the life and work of the school and students' effectiveness as learners. It will only do this if the individuals involved can transfer their past experience into the future and see themselves performing in a 'new situation' with the confidence and zeal they have used to surmount previous professional challenges. Each individual will also need to feel that the 'culture' of their school and that of the staff team(s) to which they belong is a positive one; that is, an inclination to use individual and collective professional development to review practice, confirm strengths and improve on any shortcomings.*

Source: McCall and Lawlor (2002b, pp. 129–30)

The ongoing professional development of individuals is not only good for the motivation of teachers but can itself help institutional development. It is seen by educationalists (Craft, 1996; Day 1993, 1999; Fullan and Hargreaves, 1992) as the key to successful school development. A staff development co-ordinator will have other management roles and responsibilities within the school. They are responsible for finding out the development needs of individuals and enabling them to be met. This has to be achieved within the context of the overall development plan of the school and within the boundaries of limited budgets (Rawlings, 1998). In order to do this the staff development co-ordinator must have knowledge about, and input into, many areas of school life, including:

- school development planning
- OFSTED preparation and follow-up
- professional development planning
- performance management
- management of the standards budget
- knowledge of whole-school budgetary planning
- knowledge of bids/funding
- financial management

- mentoring staff and students
- induction of new staff and NQTs
- co-ordinating INSET
- monitoring/evaluation
- professional tutors.

This involvement will allow the co-ordinator to have an overview of the development needs of the school as a whole and the individuals within it (as shown in Section 3). The co-ordinator can therefore plan for appropriate development and prioritise needs. They must fully understand the criteria of internal and external funds to match individual development needs to available finances and to be able to advise staff accordingly. They will need a good grasp of all aspects of financial management, including making forecasts and bids, administering the budget and evaluating effectiveness (Blandford, 1997b).



# CO-ORDINATING PROFESSIONAL DEVELOPMENT: THE ROLE

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In practice, the effectiveness of continuing professional development in schools will depend on the management of:

- information available for all staff concerning continuing professional development programmes, INSET, the Standards Fund, and the Teacher Training Agency national standards for teachers
- planning – collaboration between multi-agencies in consultation with their teams
- evaluation of all courses with regard to teachers' needs in relation to pupils' needs and the school
- resources – utilisation of experts from LEA agencies, schools, higher education institutions, teacher training agencies and other consultants
- networking – the need for management and teachers to consult with teams and INSET providers
- an assessment of providers based on their potential to offer value for money.

The majority of schools currently allocate the management of professional development programmes and funds either to a deputy headteacher or to an aspiring deputy headteacher (Rawlings, 1998). In the majority of primary schools, it is the responsibility of an already overcommitted headteacher. Evidence from a review of OFSTED reports (Levacic and Glover, 1995) suggested that those responsible for planning professional development in schools need to follow a planning approach (see Section 9), linking priorities for expenditure more closely to school aims (see Section 2).

In their early professional years and throughout their careers, individual teachers, assisted and guided by management teams responsible for their employment and the support of their development, should seek to develop:

- their ability to recognise the diverse talents and capabilities of their pupils as individuals
- their ability to identify and provide for the special learning needs, strengths and difficulties of all pupils
- their ability to evaluate, assess and report on their pupils' learning and to take account of that learning in adjusting their expectations
- their ability to provide for the social, moral, spiritual and cultural development of their pupils

- their own personal characteristics of awareness, imagination and enterprise
- their own professional knowledge, skills, strategies, techniques, beliefs and values
- effective working relationships with their teaching and support colleagues, the parents of their pupils, the governors of their school and members of related external agencies
- knowledge and practice of their administrative, pastoral and legal responsibilities.

*The task of co-ordinating professional development is extensive and requires more than one co-ordinator. Before organising the co-ordinator's role, it is necessary to consider the purpose of the role, which will differ between those for individual teachers and the whole school:*

#### **Teacher**

- *to improve the level of performance in relation to relevant national standards*
- *to provide understanding of the job and its implications*
- *to notify all participants of the purpose of the institution and appreciate the teacher's contribution*
- *to enhance professional career development*
- *to identify support for individual teacher's activities*
- *to increase motivation and job satisfaction.*

#### **School**

- *to raise standards of learning and teaching*
- *to co-ordinate the efforts of individuals to whole-school priorities*
- *to provide clarity and agreement in terms of individual inputs*
- *to improve communication systems and understanding of how teaching and learning take place*
- *to provide increased opportunities for exchange of ideas and dissemination of good practice.*

*Source: adapted from Field (2002, p. 15)*

### **Checklist**

#### **Key elements**

For all of the above to be achieved, all staff will be involved in undertaking learning and development and supporting the learning and development of others. This involves the co-ordinator identifying personnel who can:

- undertake reviews
- challenge assumptions
- share outcomes of professional development activities
- negotiate and agree professional development targets
- offer support in terms of resources and access to identified opportunities.

## **PERSONAL QUALITIES**

To appreciate the developmental needs of both institution and individual, the co-ordinator requires considerable knowledge and expertise and a clear vision of the future. Hall and Oldroyd (1990a) identified eight roles applicable to the position of staff development co-ordinator:

- counsellor
- motivator
- innovator
- mentor
- monitor
- evaluator
- administrator
- facilitator.

The co-ordinator must also be effective as a manager and a leader. This requires highly developed personal skills (Rawlings, 1998).

### **Checklist**

#### **What are the professional qualities of a staff development co-ordinator?**

The co-ordinator needs:

- insight as to where the institution is and where it is going in the future
- an appreciation of the relationship between individual development and institutional development
- an ability to ascertain the perceived and unperceived needs of individual staff
- an ability to understand what motivates staff
- a high degree of financial expertise and budgetary management
- knowledge to suggest appropriate courses of action
- sensitivity and the ability to listen
- accessibility and approachability.

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## Chapter 15

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# CO-ORDINATING PROFESSIONAL DEVELOPMENT: THE PROCESS

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Ideally, the co-ordinator will have received training for the role before taking it on; often co-ordinators do not receive adequate training. The most pressing need identified by co-ordinators is for training in financial and budgetary management, especially the integration of budgetary and development planning. Other areas identified for training were evaluation skills and techniques, collating or formulating the SDP, time management skills and skills relating to the role of counsellor, motivator and mentor (Rawlings, 1998).

A key task for the staff development co-ordinator is to establish priorities (Wallace, 1989). As a manager, the co-ordinator will need to take decisions involving making judgements about matters identified in the following checklist.

### Checklist

#### What are the key tasks of the staff development co-ordinator?

In schools the role of the staff development co-ordinator will include some or all of the following tasks:

- to oversee the cycle of staff development and keep it on course
- where necessary to facilitate and support the staff development group and liaise between the group and the headteacher (if the headteacher is not a member of the group)
- to communicate information to staff
- to become experienced in the management of staff development and encourage appropriate management techniques and attitudes
- to assist in the identification of needs and the placing of these in order of priority
- to facilitate and, where necessary, administer interviews, questionnaires and other paperwork
- to design, or help others to design, courses; to organise and run school-based courses
- to liaise with the LEA staff development advisers, the INSET co-ordinator and the cluster providers, and to represent the school at meetings with outside agencies
- to ensure that the school derives maximum benefit from every course by stimulating and overseeing the dissemination of information and by 'cascading' it down
- to design and implement the evaluation of staff development and INSET
- to maintain a record of courses attended and of staff expertise for use in future courses or 'self-help' groups.

A key role for the staff development co-ordinator is to establish priorities (Wallace, 1989). As a manager, the co-ordinator will need to take decisions involving making judgements about matters identified in the following checklist.

### **Checklist**

#### **Staff development priorities**

The staff development co-ordinator must judge:

- who should be involved in making these decisions
- who should be consulted about the decisions
- how an appropriate balance can be struck between needs at individual group and whole-school levels
- the priority to be given to needs arising from national, LEA and school policies
- the priority to be given to individual personal interests, career aspirations and concern to improve the performance of present tasks
- the likely resources required to meet needs such as supply cover, staff training days and school budgets
- the capacity of staff to cope with additional pressures arising from the proposals
- the possible impact on the children of their teachers being absent on INSET activities
- how priorities are to be communicated to staff and, as appropriate, relevant people in the school cluster or pyramid, the LEA INSET co-ordination, LEA advisers and advisory teachers.

## **ISSUES**

Adey and Jones (1997) identified several issues of concern to staff development co-ordinators:

- lack of status
- not being fully involved/informed in the process of planning/budgetary strategy
- lack of time
- lack of information from appraisal
- inadequate knowledge and skills, particularly regarding finance and budgeting, and planning and evaluation
- lack of understanding on the part of middle managers about the process of professional development.

These issues must be addressed if staff development co-ordinators are to fulfil their potential in facilitating both individual and school development (Rawlings, 1998). Unfortunately, as the MORI Survey of Continuing Professional Development (TTA, 1995) confirmed, staff development is not being given the status it requires. The government is currently promoting training in its initiatives to raise standards (OFSTED, 1996a; DfEE, 1997b).

## **SOLUTIONS**

A change of perception on the part of senior and middle managers is required if staff development is to become central to all that happens in school. If such a change were to take place, co-ordinators would be considered integral to the school planning process and appraisal. The problem of lack of time must be considered seriously. This can be alleviated if specific time is planned for liaison rather than odd moments grabbed at lunch-time or after school. The problem can also be solved by giving the role to a person without other major commitments, which is difficult within the primary phase. A specific job description would clarify the duties involved in the post. Help with administration would also free time for more important aspects of the role. Training and support could be made available if schools and central government were genuinely committed to professional development. A whole-school commitment to ongoing continuous development would ensure that all members of staff were aware of its importance. These problems are not insurmountable, given more widespread appreciation of the benefits staff development brings to all concerned. But if they are not tackled, staff development will continue to remain a side issue and fail to reach its potential to bring about change (Rawlings, 1998).

### **Checklist**

#### **Key conditions**

To support professional development, certain conditions are required.

- Time for face-to-face contact must be made when participants are not interrupted. All participants should have sufficient time to cover all eventualities
- Locations should be selected to avoid disruption and interruptions. The teacher should feel comfortable and non-threatened
- All participants must be prepared. The leader should ensure relevant stimuli for discussion and allow enough time for evidence to be collected and presented by the teacher:
  - explore matters of importance and relevance in advance
  - examine various action plans
  - begin to draw preliminary conclusions for the review evidence.

## **IMPLEMENTING SCHOOL AIMS**

Many opportunities for development of both individual and institution exist. How they are utilised will depend on the skills of those managing the development process. The role is often shared between the headteacher, other members of the senior management team and an identified member of staff (often the deputy). If the role is to be shared there is a need for openness and good communication between all those involved. Without this, the pressing needs of the school often take precedence over the needs of individuals. The staff development co-ordinator can prevent this happening, provided that they have sufficient information about all aspects of school development and adequate knowledge about the needs of every individual within the school (Rawlings, 1998).

## **STAFF DEVELOPMENT AUDIT**

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Sufficient time for informal discussion with staff, and regular opportunities for staff to state their needs formally through the use of development interviews and/or assessment forms, is essential. Release time and money for cover must be available to enable the co-ordinator to liaise adequately with staff. Fullan and Hargreaves (1992) point out that members of staff at different stages in their life cycle and career have different needs. These differing needs must be known, for otherwise informed decisions about staff and school development cannot be made.

Formal interviews and the appraisal process can help in this respect as they imply commitment to staff development on the part of the senior management team. The contents of such discussions will need to be regularly monitored and evaluated if they are to influence future development. The co-ordinator needs time to collate the information gleaned from staff and consider the opportunities for individual development within the overall plans of the school. Time is also needed to evaluate the effectiveness of the development that does take place.

Professional development planning should reflect the needs of the institution and of the individuals within it. An informed staff development co-ordinator can use development opportunities for the benefit of both individuals and the school. The co-ordinator is particularly useful here because they will understand what is possible, given the limitations of the school itself (Rawlings, 1998).

## **CHOICE OF COURSES**

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To gain the most from limited budgets and opportunities, professional development has to be co-ordinated not only sensitively and realistically, but also creatively. Not everyone can do every course they want, because of limited availability and resources. The co-ordinator can, however, help staff realise their potential by other means, as shown in Section 5.

Internal development, according to Craft (1996), can often be more successful than external courses because it meets the needs of particular individuals in a particular school. The co-ordinator must have an appreciation of all forms of school-based development and also be familiar with the range of available external courses in order to encourage staff appropriately. Bids for development initiatives must be made, application forms sent off for appropriate courses and the necessary supply cover arranged (Rawlings, 1998), as shown in Sections 8 and 9.

## **ENCOURAGEMENT**

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A range of activities can help the development of individuals and, if implemented across the school, can help the development of the school itself. The role of the co-ordinator is to suggest and facilitate such development. This may involve organising supply cover, but such activities do not have to be expensive, as teachers who are committed to a course of action can often organise themselves to enable it to happen. They do, however, need encouragement and permission to do so. Many possibilities for development, such as the above, depend on the general culture of the institution and the nature of its management. The development of individuals need not depend on expensive external courses, but does depend on other

opportunities being recognised, suggested and utilised. It is in this capacity that the staff development co-ordinator, working with senior management, can make a difference to the lives and careers of individuals as well as help the school as a whole to develop (Rawlings, 1998).

## LEARNING STYLES

Members of the school community will be committed to lifelong learning and the learning organisation. Teachers and support staff will have knowledge and understanding of the processes of teaching and learning. Many will have higher education qualifications (see Section 8) or will be considering further study. The staff development co-ordinator and members of the senior management team will be aware of this expertise.

Senior managers should also be aware of the differing styles of learning that exist. There are four recognised categories of learner: activists, reflectors, theorists and pragmatists. Co-ordinators should know and understand their colleagues' needs and respond accordingly. The following, based on Honey and Mumford (1982), defines adults' preferred learning styles and the type of course that would be appropriate to meet the needs of each category of learner.

**Activists** learn best from constant exposure to new experiences. They like to involve themselves in immediate experiences and tend to act first and consider the consequences later. They enjoy new challenges but are soon bored with implementation and consolidation. They will experiment with new techniques, using all their senses: they like to talk things over, but dislike research and logical thought. They use intuition, see the whole picture and all the alternatives and prefer working out alternatives to deciding on action plans.

*Course structure:* Interactive, high-profile activities and new challenges but not listening to lectures, theory or too much detail, e.g. role-play exercises.

**Reflectors** learn best from activities that allow them space to ponder over experiences and assimilate information before making a considered judgement. They tend to be cautious and spend time listening and observing.

*Course structure:* Opportunities to observe, listen, review or research without time pressure or pressure to perform, e.g. flexitime study.

**Theorists** learn best from activities that allow them to integrate observations into logically sound theories. They like to assimilate information in a tidy way. They are good at analysis and are comfortable using theories and models to explain and understand things. They like detail, planning and reason but dislike intuition and risk and are wary of working with others.

*Course structure:* Complex theory with time to question, but not unstructured situations, that lack concept, depth or validation, e.g. a seminar with other theorists.

**Pragmatists** learn best from activities that have clear practical value and that can be tested out in action. They tend to dislike open-ended discussions. They make plans, want results, work well alone and like to solve problems in their own way without giving much attention to other ideas.

*Course structure:* Practical, experiential courses led by someone with respected experience in the field on subjects which really matter, e.g. a course involving simulation and coaching to solve a real-life problem.



Some people combine learning styles. Teams will certainly be composed of a combination. Each type of learner has the tendency to undervalue the skills of others, and this needs to be recognised by managers and team members. Co-ordinators and senior managers should consider:

- What might be difficult learning situations for each type of learner?
- How much influence does context have?
- How might you develop a more balanced learning style?

In addition to the above, Field (2002, p. 6) explains that individuals have responsibility for how they learn:

*Any professional development directed towards changing personal behaviour and responsiveness requires the individual to take responsibility for his or her own learning ...*

- *The degree of match between the experience and the learner's existing ideas*
- *The status of the learner gives to the learning process*
- *The learner's 'feelings' about the value of the activity used to mediate the learning*
- *The learner's respect for the people he or she is asked to learn alongside*
- *The learner's level of 'need' about wanting to achieve worthwhile outcomes for others*
- *The emotional and intellectual satisfaction the learner gets from their educational institution and the roles and responsibilities they hold within it*
- *How far the learner is motivated by intrinsic and extrinsic rewards to succeed further.*

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## Chapter 16

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# ACTION PLANS

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Once the staff development programme is implemented, the next key step is to ensure that there is appropriate follow-up action. Hall and Oldroyd (1990a) believe that an action plan is a useful tool for achieving this. An action plan is the link between training and follow-up. It is the implementation process that links new learning to practice in the school and classroom. If members of staff develop detailed plans in which senior managers show little interest, they will become frustrated, and time and effort will have been wasted.

A good action plan needs to give detailed consideration not only to the innovation intended, but also to the strategy that will be employed to implement it. The process of planning is often more important than the plan. In terms of the innovation itself, the action plan might address the questions given in the following checklist.

### Checklist

#### Action plans – key questions

- Who will benefit from the change: pupil/students, myself, colleagues, others?
- What will the costs be for those affected?
- Is the change envisaged easy to communicate to those concerned and will they see its purpose?
- Will it be possible to adapt what is intended to suit specific circumstances?
- Will additional or new resources be required?

In terms of the strategy for applying the change, these questions might help to focus an action plan:

- Who will need to know about what I am hoping to achieve?
- Whose support will be needed?
- Can I give other key people a sense of ownership of the change and so win their support?
- Will I need to negotiate with other people before the change is introduced?
- How shall I get feedback about progress?

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# Executive summary

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This section has shown that effective and improving schools require the effective management of professional development. Key points to consider are:

- The staff development co-ordinator will have other roles and responsibilities within the school
- The co-ordinator must have access to appraisal and school development targets
- A staff development co-ordinator will be a counsellor, motivator, innovator, mentor, monitor, evaluator, administrator and facilitator
- The co-ordinator will audit needs, identify priorities, plan a selection of courses, produce action plans, and monitor and evaluate practice
- Co-ordinators should understand their staff's preferred learning styles and plan professional development activities accordingly
- Action plans are required for professional development activities.

The following section focuses on development opportunities in schools.
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# Workshop materials

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## 4.1 Action plans

100

## Workshop 4.1

### ACTION PLANS

The following exercise (Heale et al., 1993) could be used with the whole school during a training day. The aim of the exercise is to produce a whole-school action plan for evaluating practice. This could be facilitated by a member of staff with expertise in this area.

**Purpose:** To produce a whole-school action plan through which each member of staff commits themselves to evaluating practice

**Materials:** Flipchart and pens

**Grouping:** In small schools this exercise can be done by the whole staff. In larger primaries, groups should be organised according to key stages. In secondary schools, groups should be organised according to departments or faculties

**Time:** 45 minutes

Headings for the whole-school plan are suggested as follows (**Model A** for primary schools, **Model B** for secondary schools) and will need to be written up on the master flipchart.

Section/department/faculty/year/subject/key stage plans allow for different models to suit circumstances and personnel.

## Workshop 4.1 (continued)

## ACTION PLAN: MODEL A

This school proposes to adopt the following model for evaluation:

Teacher	Supported by	Proposed purpose	Proposed focus	Date

**Workshop 4.1 (continued)**

#### ACTION PLAN: MODEL B

This section/faculty/dept proposes to adopt the following model for evaluation:

Teacher	Supported by	Proposed purpose	Proposed focus	Date

**Workshop 4.1 (continued)**

Having completed the plan, staff should respond to the following.

**Action planning: evaluating practice**

The model for classroom observation with which I would like to work is:

The purpose I would choose is:

The focus that I would find helpful is:

The method of support that I would choose is:

I would like to begin the process (state when):

The whole-school action plan for evaluating practice can be produced based on the above example/responses.





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## Section 5

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# DEVELOPMENT OPPORTUNITIES IN SCHOOL

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Effective schools are learning organisations, where teachers and pupils alike progress from year to year. Research studies indicate that schools and the day-to-day life of teachers provide many learning opportunities. Reflecting on and enquiring into classroom activity constitutes a positive learning experience. Experimentation and evaluation are also best conducted in real-life situations.

Other ways in which teachers can learn include the presentation and sharing of practices and events with fellow professionals outside the classroom. The transformation (continuous improvement) of practice demands that teachers combine new approaches learnt outside the classroom with skills of learning on the job. These are features that contribute towards a school being effective.

This section will provide guidance on the following professional development activities and will include the following:

- induction
- mentoring
- self-development, a sharing of expertise
- team development – identifying an area of development, sharing advice, problem solving
- ‘in-house’ courses – identifying and utilising expertise
- job exchange: working in a different environment, job rotation, encouraging colleagues to share classes, and job shadowing
- visiting other schools/management development.

School improvement is an outcome of creating a learning organisation. Recognising that development involves on-the-job activities is critical to all practitioners. When considering how to identify suitable training, it would be useful to think about what areas of expertise are available within the school, LEA or partner higher education institutions (HEIs). Trainers need to have up-to-date, relevant experience, as practitioners want experts who ‘can do’ rather than ‘can tell’.

Professional colleagues are often the most under-utilised resource in schools (Earley, 1994). Before engaging external providers of professional development, consider the range of in-house activities. This section will describe such activities. The list, while comprehensive, is by no means complete; your staff will have their own ideas! A staff development audit, as suggested in Section 4, may provide you with the expertise you require for your professional development programme.



# CAREER ENTRY PROFILE/ INDUCTION

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Teaching is an increasingly challenging career, and induction for newly qualified teachers or newly appointed staff is vital if teachers are to fulfil their roles professionally (Shaw et al., 1995). In any profession, the transition from training to the workplace generates certain tensions; employees need to know that the contributions they make are valued, and employers need to ensure that their staff have the appropriate training.

### CAREER ENTRY PROFILE

The Career Entry Profile (CEP) was introduced as a pilot in 1998 and then as a requirement from 1999 as part of the assessment system for students completing the Postgraduate Certificate of Education (PGCE). The document is completed in a partnership between the student, the university (or college) department of education and the staff of the school within which the student has gained most of their practical experience. The Teacher Training Agency (TTA) requires the student to outline four strengths of teaching during the PGCE year and four areas for further development in their first year of teaching. The document is used as part of the basis for professional development as a newly qualified teacher (NQT) in the school.

Professional tutors responsible for students in training in the schools are making increasing use of the drafting stage of the CEP during the training period, and of review during the induction period, as a structure on which to pin professional development. Above all, students are being supported by school staff in the completion of worthwhile documents closely integrated with the development of teaching skills.

### INDUCTION

Effective induction ensures that newly qualified teachers and any teacher new to the school feel supported and confident, ready to join an effective team, and willing to contribute to their own and the school's development. Effective induction helps each NQT to maintain and to build on the standards of teaching that they have attained in meeting the Standards for the Award of Qualified Teacher Status (QTS). The Induction Standards provide a framework for this development. They are the criteria against which NQTs are assessed at

the end of the induction period; and they also represent an entitlement, in that schools must provide NQTs with the opportunity to meet, and to show that they are meeting, the Standards. The Induction Standards are therefore important, not only to NQTs, but also to everyone involved in the monitoring, support and assessment of NQTs in schools, LEAs and HEIs.

The government has stated that the requirements for satisfactory completion of the induction period, taken as a whole, must support NQTs as they build on their previous achievements. They should therefore represent a coherent progression from the level of practice expected of a trainee teacher when meeting the Standards for the Award of QTS.

In part, progression is monitored by requiring an NQT to continue to meet the QTS Standards consistently during their first three terms as a fully qualified teacher. There are many important aspects of a teacher's practice to which the Induction Standards do not specifically refer because, in these areas, the majority of teachers will be sufficiently challenged by consolidating the skills and understanding that they developed during their initial training.

The Induction Standards themselves therefore focus on specific areas where the expected progression from QTS goes beyond this consolidation. They aim to do this by:

- requiring NQTs to take the initiative, or to work independently, in areas where, during initial training, it was assumed that they would have the support of an experienced teacher
- focusing on aspects of professional practice that can be better developed during employment as a qualified teacher, and over a longer period of teaching than is available to most trainee teachers during their initial training.

The Standards are only one aspect of the statutory induction arrangement, but they are an important one. They need clearly to set out the progress that is expected of NQTs during their first year as fully qualified teachers, in order to provide NQTs, and those who are working with them, with a framework for planning professional development. They also provide the criteria against which NQTs' progress is monitored.

### **Checklist**

#### **What is needed for effective induction?**

Effective induction needs to be planned but flexible. The following actions should be taken:

- Appoint a mentor
- Identify the training, development and personal needs of the new appointees
- Negotiate with your new colleague the most appropriate personal and professional support
- Develop a climate of mutual support
- Create an environment that is open; respect the needs of others
- Promote job shadowing and observation, laying the foundations for reflective practice.

- Ensure that the newly appointed member of staff can identify with their team
- Ensure that the new appointee will:
  - know their role
  - know their managers
  - know their team.
- Consider external factors:
  - accommodation
  - transport
  - social needs.
- Ensure that support and professional guidance are relevant
- Plan a central induction programme to enable newcomers to meet and discuss their strengths and weaknesses; this programme may begin in the term before the member of staff takes up their post
- Provide access to external support networks, subject organisations, support groups and LEA advisers.

Further guidance on the induction of newly qualified teachers (NQTs) is given in Workshop 5.1 at the end of this section.

## **INDUCTION: NEW APPOINTMENTS**

When a new member of staff joins your team/school, identify (in advance) what they will need to know; see the following checklist.

### **Checklist**

#### **New appointee information**

- Job description
- Their position in the team/school
- School's aims (SDP)
- Department's aims (DDP)
- Relevant documentation, including staff handbook
- Reporting and assessment procedures
- Members of his/her team – introduce colleagues
- School policies
- Identities of vulnerable pupils.

The new appointee will require further documentation, as in the next checklist.



## Checklist

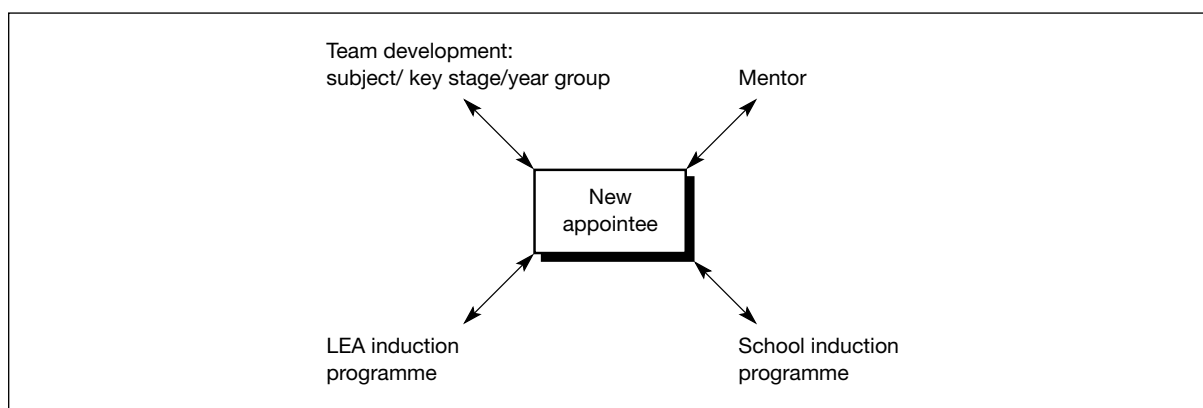
### New appointee documentation

- Contract (including start date and time)
- Staff handbook
- Health and safety details
- Timetable
- Staff lists
- Room lists
- Class lists
- Reports/assessments
- Schemes of work/lesson plans.

Relevant information and documentation should be prepared by the manager in advance of the interview to enable the new appointee to take away relevant information. The manager should then arrange times when the appointee can visit the school and department to meet new colleagues and pupils. A period of induction would provide support for a new colleague, as would a mentor. This should be planned carefully and reflect the needs of the appointee and the school.

Figure 5.1 illustrates the range of induction activities available to a new appointee. Senior management and school development co-ordinators should ensure that new staff have access to all support mechanisms and relevant information.

The professional development co-ordinator has an important role to play in the induction of NQTs and new staff, both of whom have specific development needs. These needs must be identified and the appropriate induction process planned. Release time for staff involved and the money for any supply cover should be available. The staff development co-ordinator can work within this to encourage staff to become involved in the induction programme, actively promoting the development of individuals. They can also ensure the participation of members of staff who have identified such areas for development through the process of appraisal and in development interviews (Rawlings, 1998).



**Fig. 5.1 Areas of support for newly appointed staff**

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## Chapter 18

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# MENTORING

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Mentoring is a term that is used in several different contexts in education (Ormston and Shaw, 1993). It generally means the positive support offered by staff with some experience to staff with less experience of the school. This experience can extend over a wide range of activities, or be specific to one activity.

Teachers may engage in a number of mentoring relationships:

- mentoring of newly qualified teachers joining their teams
- mentoring of colleagues to support them in their new role
- as a mentee, either of a middle manager/leader or senior manager/leader in preparation for a current or future post.

Mentoring roles will differ according to need. For example, career needs call for vocational roles, which include: educating through enhancing the mentee's skills and intellectual development, helping to develop a set of educational values, consulting to help the mentee to clarify goals and ways of implementing them, helping to establish a set of personal and professional standards, and networking and sponsoring by providing opportunities for the mentee to meet other professionals.

Support needs, on the other hand, call for interpersonal roles, which include: sharing and role modelling, and allowing the mentee to gain an insight into how the mentor works in a professional capacity. A mentor should also encourage a mentee in order to build their self-confidence, recognising success. A mentor is also a counsellor who listens but does not tell the mentee what to do. Not all mentors will fulfil all the roles above, but the greater number of roles, the richer the relationship.

### Checklist

#### The role of the mentor

- Vocational roles help the newly qualified teacher, new appointee, middle manager or new headteacher to adjust to changes in their career pattern and in advancing within the profession
- Interpersonal roles enable the mentee to clarify a sense of identity and to develop a greater sense of competence and self-esteem.

Mentors are likely to have a number of roles within the school and they need to decide whom to mentor in the context of their other tasks and responsibilities. Mentoring is time consuming. Mentees should select their mentor on the basis of professional needs, present and/or future.

It is important to understand that mentoring is a continuous staff development activity which, once the system is established, takes place during normal school life. Mentors need to know and understand the essential elements of a mentoring relationship.

### **Checklist**

#### **What are the essentials of mentoring?**

The essentials of mentoring are:

- a recognised procedure, formal or informal
- a clear understanding of the procedure and the roles of mentor and mentee
- trust and a rapport between both parties
- the credibility and genuineness of the mentor as perceived by the mentee
- confidentiality and discretion
- a relationship based on the mentee's perception of their own needs
- a suitable range of skills used by the mentor: counselling, listening, sensitive questioning, analysis and handing back responsibilities
- an appropriate attitude by both parties, for example the ability of the mentor to challenge the mentee, and the self-motivation of the mentee to take action when necessary

In addition, teachers should be aware of equal opportunity issues that need to be addressed in the selection and training of mentors.

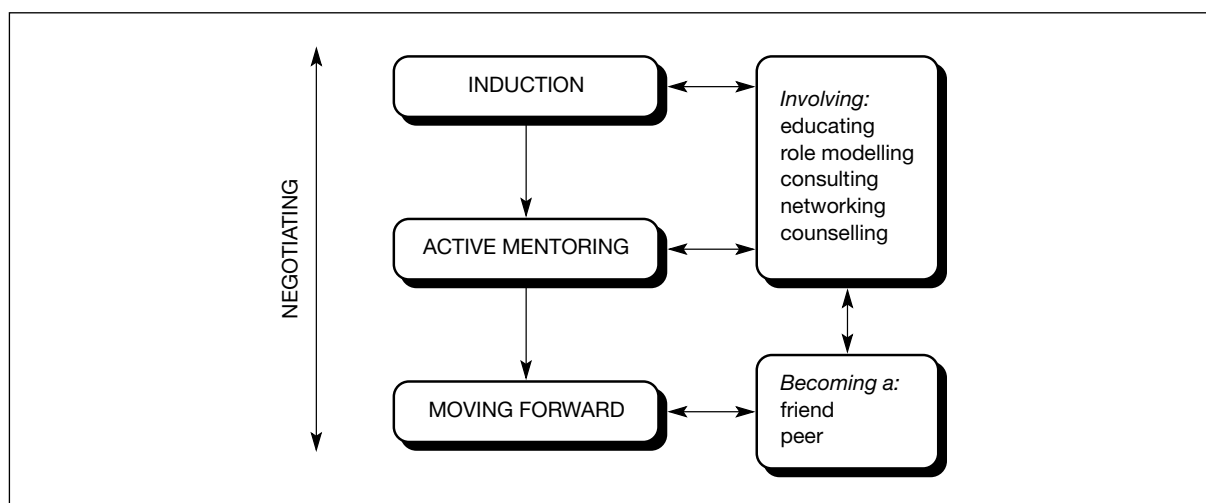
Mentoring is a positive mechanism for developing management skills for both the mentor and mentee. As a process, mentoring should move through the stages shown in Fig. 5.2.

The stages of mentoring will involve a period of induction for the mentor and mentee. This comprises educating, role modelling, consulting, networking and counselling. During this stage, both mentor and mentee need to ensure that they are the most appropriate people for the role. Interpersonal skills are essential for effective mentoring.

Active mentoring will involve further negotiations between mentor and mentee. The framework for the development of the relationship will need to be agreed. Changes may occur as the balance of the relationship moves from dominant/subordinate positions to a relationship with greater equality.

Ultimately the relationship will change to that of a friend or peer. If specific targets have been set, once these are reached a sense of becoming an equal is readily acknowledged. If the relationship is less ordered there may be a difficulty in recognising the true meaning of the process. At no time should a sense of hierarchy dominate the relationship.

In sum, mentoring is a process whereby you can pass on to someone else your knowledge and understanding, skills and abilities. As a method of developing the knowledge and understanding, skills and abilities of teachers, it has proven qualities.



**Fig. 5.2 Stages of mentoring**

There are some possible drawbacks to mentoring. Mentors may:

- pass on bad habits
- not be qualified/able to impart their knowledge of their job
- lack the patience required
- be reluctant to pass on their skills
- be too closely involved to see their job from another person's perspective.

### Checklist

#### How to create a mentor scheme

- Make all staff and governors aware of the scheme. This limits:
  - animosity from teachers who are not on the mentor programme
  - antagonism of middle management if teachers in their department/teams sometimes have mentors elsewhere in the school
  - anxiety of governors who may see it as a system for 'favourites'.
- Nominate a senior (trained) member of staff to manage the scheme and to train members in skills such as coaching, guidance and counselling
- Select teachers and mentors. Both should be volunteers, but some selection may be necessary. Teachers should be assertive, positive and willing to work hard and to learn. Mentors should be professionally expert, empathetic and have good interpersonal skills. They coach, encourage self-assessment, teach skills, encourage project work and innovation, argue and discuss
- Pair up mentors with suitable teachers to maximise benefit. Draw the department head or manager into the process
- Assess the success of the scheme, weighing the development of the teachers against the problems experienced. Ensure that mentors gain in credit, in experience and in possible career prospects.

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## Chapter 19

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# SELF-DEVELOPMENT

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Self-development is systematic; we never stop learning and developing. The art of self-evaluation is to be continually learning. Senge (1990, p. 142) makes it clear:

*People with a high level of personal mastery live in a continual learning mode. They never 'arrive'. People with a high level of personal mastery are acutely aware of their ignorance, their incompetence, their growth areas. And they are deeply self-confident. Paradoxical? Only for those who do not see that the journey is the reward.*

The culture of the teaching profession is changing, reflecting the changing society in which we live, with its proliferation of cultures, beliefs and values. Effective teaching and learning in schools are based on shared beliefs and values. The school community works towards a common goal, reaching for and achieving targets. In practice, teachers need to relate their actions to their beliefs and values. If the two do not equate, teachers should consider their position in the school in relation to pupils' needs. Schools should be places in which success is celebrated, the 'blame culture' prevalent in the 1980s replaced by the 'caring culture' of the 1990s and beyond. How does this happen? Do teachers willingly participate in the change process, or are they passive in their response to the dominant ideology of the day? Whilst these are matters of sociological debate, self-evaluation and effective self-development should influence practice in a positive way. A starting point for this process could inform practitioners about their individual aspirations in terms of their career.

A fundamental issue will be the individual's ability to recognise where they are in relation to where they would like to be. As Senge indicated, the most successful among us will never reach their destiny.

*Self-evaluation of professional competence is more than an assessment of traditional conformity or technical accountability. It is assessed in terms of moral and prudent answerability for practical judgements actually made within the context of existing educational institutions (Carr and Kemmis, 1986, p. 31).*

Theory and knowledge can transform a teacher's beliefs and values. In the process of self-reflection, interaction with educational theory may not dictate practice, but it may transform the outlook of the practitioner. Providing individuals with new concepts is a means not merely of offering them a new way of thinking, but also of offering them the possibility of becoming more aware of their thoughts and actions. The full task of self-reflection and

evaluation requires teachers to collaborate in decision making that will transform their situation. The process of self-evaluation encompasses the interaction of the teacher with the school. Teachers should consider whether they are in the right school for them.

### **Checklist**

#### **What is career planning?**

##### **Key questions:**

- What do I value?
- What is my present situation?
- Where would I like my career to lead?
- How might I get there?
- What help is available?

##### **Personal qualities needed:**

- ability to self-manage
- clear personal values
- clear personal objectives
- an emphasis on continuing personal growth
- effective problem-solving skills
- the capacity to be creative and innovative.

A means of developing the skills required for self-evaluation is to consider the range of knowledge that exists regarding educational practice:

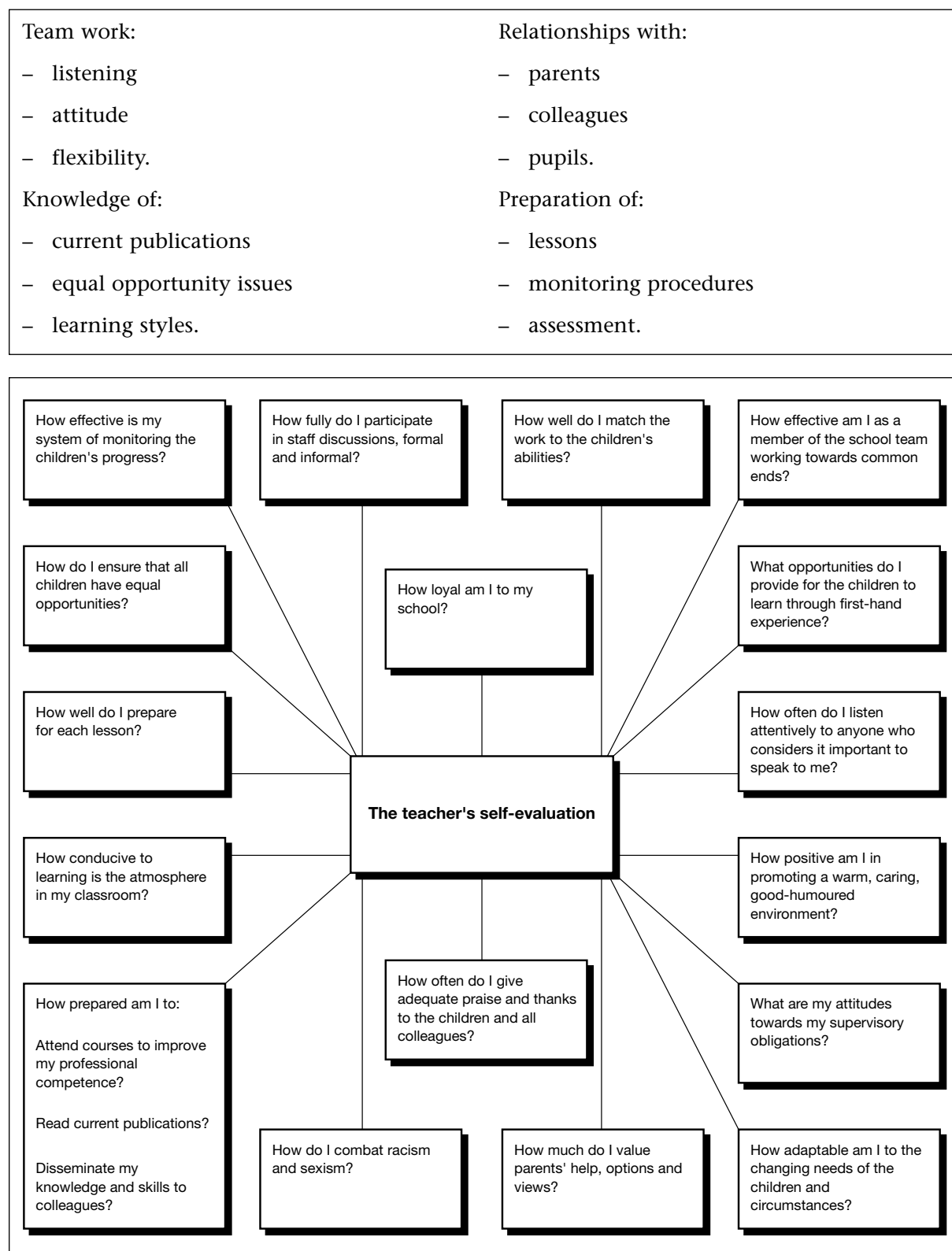
- common-sense knowledge about practice that is simply assumption or opinion, for example the view that students need discipline
- folk-wisdom of teachers, like the view that pupils get restless on windy days
- skill knowledge used by teachers: how to line pupils up, or how to prevent pupils speaking while instructions about a task are being given
- contextual knowledge: the background knowledge about this class, this community or pupil, against which aspirations are measured
- professional knowledge about teaching strategies and curriculum
- educational theory: ideas about the development of individuals, or about the role of education in society
- social and moral theories and general philosophical outlooks: about how people can and should interact, the uses of knowledge in society, or about truth and justice.

*Source:* adapted from Carr and Kemmis (1986, p. 3i)

Isaac (1995) commented: 'Developing yourself ... depends on the extent to which you recognise issues from your reflection, and learn to change your behaviour.'

## PRACTICE

A practice-based approach to self-evaluation is shown in Fig. 5.3. In this example questions relate to the practitioner making sense of themselves in a range of situations:



**Fig. 5.3 A model for the teacher's self-evaluation**

Source: Manchester LEA (1986)

As a process, self-evaluation should inform practice day to day, lesson to lesson. An effective teacher will be effective in their evaluation of themselves. In practice, self-development will involve making sense of ourselves in situations.

Look at Fig. 5.3 and ask, where am I in this process?

### **Checklist**

#### **Self-development – key issues for consideration**

- Relationship with self (self-evaluation)
- Ability to develop
- Level of empowerment – status, value
- Choices available
- Opportunity for individualistic activities.

Self-development involves learning and understanding where you are within your job and career. Practitioners should, as stated, have a clear view of what their job is about: the relationship between teaching, leadership and management, SDP and so on. Practitioners should also have an understanding of their position in relation to those they manage. For a practitioner, self-development can be difficult. Practitioners face many demands, including:

- government demands: to deliver the curriculum, to register pupils, parents' evenings
- senior management demands: implementation – action of school policy
- colleagues' demands: requests for assistance, information or help from others at a similar level or within your team
- pupils' demands: to inform and liaise
- parents' and governors' demands
- externally imposed demands: social services, police, agencies that work for and with young people
- system-imposed demands: LMS, LEA, budgets, meetings and social functions, which cannot be ignored.

In addition, there will be other demands such as family, friends, hobbies and social commitments. It is important to understand that teachers and support staff need a balance between their professional and personal lives.



### **Checklist**

#### **Self-development – where to begin**

As a starting-point, practitioners could begin with the factors influencing self-development:

- |                                       |                          |
|---------------------------------------|--------------------------|
| ● use of environment                  | ● lesson organisation    |
| ● environment for learning            | ● promotion of learning  |
| ● resource development and management | ● flexibility            |
| ● classroom control                   | ● subject competence     |
| ● teaching performance                | ● pastoral competence    |
| ● rapport with pupils                 | ● professional approach. |

*Source: Day (1993a)*

Support from colleagues is critical to self-development. The next chapter focuses on the important area of professional development in schools: teams.

# DEVELOPING TEAMS

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Effective team leadership will produce effective teams and an effective school. A team leader has to be able to work in an open and honest manner. As professionals, teachers should value effective teamwork; schools depend on it. Effective teams will enable professional development to occur as a matter of course. Staff will feel able to participate in a developing school, thus enabling personal growth and professional development. Respect is critical to this process, as is a recognised system of operating as a team. For a team to be effective, members must:

- know their role
- know their team
- know their managers.

### Checklist

#### Characteristics of effective teams

- *Clear objectives and goals* – according to task
- *Openness and confrontation* – dependent on effective communication and interpersonal relationships
- *Support and trust* – requiring active listening and understanding
- *Co-operation and conflict* – working together, sharing and developing ideas in a democratic and creative manner
- *Sound procedures* – enabling everyone to contribute to decision making
- *Appropriate leadership* – knowing and understanding team members, their beliefs and values.
- *Regular review* – monitoring and evaluating in a rigorous manner
- *Individual development* – enabling individuals to develop strengths, involving appraisal and staff development
- *Sound inter-group relations* – a commitment to teaching pupils through openness and trust.

The process of managing a team is also dependent on the task. A positive model of effective school teams is shown in the following checklist.

### **Checklist**

#### **Characteristics of effective teams**

- Information is readily available to all concerned
- Policies and learning activities for pupils are clearly linked together
- It is easy for participants to see the relevance of their work to the overall process of providing an education to meet pupils' needs
- Participants gain satisfaction and develop commitment as they are able to participate in a way that is relevant to them
- Most of the operations involved already exist in the school – policies, plans, budgets and evaluations
- The team provides a clear method for accountability
- Openness of information is guaranteed
- Teams co-operate to benefit each other rather than to compete for resources
- The overall process is clear and easily understood
- There is in-built flexibility within programmes to respond immediately to new or emerging pupil needs.

*Source: Hall and Oldroyd (1990a)*

There are practical exercises on team development in Workshops 5.2 and 5.3 at the end of this section.

# IDENTIFICATION OF NEED

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The term 'teacher-led development' is used to refer to strategic action initiated and sustained by teachers with the express purpose of improving teaching and learning.

## IDENTIFICATION OF NEED

The identification of need is the starting point for any in-house training; this begins with the analysis of training needs. A gap analysis reveals what is happening in school and what is intended to happen. For example, there might be a gap between:

- performance indicators and target performance indicators
- the evidence of the school review and the school development plan
- the school's results and planned results
- the knowledge and skill possessed by staff and the knowledge and skill shown by job analysis or skills analysis to be required
- performance management of individuals and the target performance.

### Checklist

#### Identification of personal training needs

Teachers may use a combination of means to assess their own training needs, for example:

- recording and analysing daily activities
- seeking the observations and comments of colleagues
- asking a senior manager to appraise a particular aspect of performance
- considering likely career paths and identifying the skills gap
- keeping a personal diary of management experiences.

## **Checklist**

### **How to identify training needs**

The stages in identification of training needs are:

- from the school development plan, planned and forecast intake numbers, national curriculum requirements and contraction or expansion plans: extract the implications for staffing and skills
- from a study of current operating problems and shortfalls: identify those that could be rectified by training
- from job analysis and skills analysis: identify the training needs of teaching and non-teaching staff
- from co-ordinated feedback from appraisal of staff: identify the training needs of individuals or teams
- from an assessment of the likely succession changes in the school: identify the succession training needs.

# JOB EXCHANGE/JOB SHADOWING

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There are many opportunities for staff to develop knowledge and understanding, skills and abilities in school. The notion of job exchanges may appear to be difficult to grasp in the subject-based environment of national-curriculum-driven schools. However, as a means of developing staff a job exchange can provide high-impact training opportunities. The key is preparation and planning.

### Checklist

#### Job exchange

To begin:

- compile information on learning needs
- be aware of favoured learning styles
- consider where learning and development opportunities exist in school
- set realistic targets for learning and development
- plan appropriate activities
- review achievement
- decide what additional experience is needed.

When job exchanges are difficult to organise, other opportunities may be possible. Staff may be able to:

- seek opportunities to learn without the need to manufacture special experiences
- learn to try different behaviours to achieve familiar tasks
- ask others to observe and feedback on their style and actions
- observe and analyse the management behaviour of others
- ask colleagues for their experience, advice and coaching
- decide specifically the experience to be acquired and seek opportunities to practise it
- set up a self-directed project, possibly planned and observed by a colleague
- seek out and volunteer for additional responsibilities or secondments that fall in line with development needs.

Job exchanges/self-directed projects will only be effective with the support of middle and senior managers. Management also requires training.

### **Checklist**

#### **Job exchange – management support**

Senior staff can help to encourage in-school training if they:

- encourage an environment conducive to on-site learning
- provide and organise learning opportunities
- offer feedback to teachers
- offer to provide observable behaviour as a positive model
- offer coaching in an agreed area of skill development
- undertake similar training themselves
- transform research or innovation into the form of projects offered as challenges to individuals or teams.

Job shadowing is distinct from classroom observation (see Section 4) in the following ways:

- it takes place over a longer period
- the aim is to watch someone at work, rather than to collect feedback on specific aspects of their work
- it is less structured, more open-ended and might be used to identify aspects of work for more detailed observation.

Job shadowing could be for a half-day, a day or even for longer. It is perhaps as close as you can get to seeing someone else's job from their point of view. It can also give a realistic experience of life at work, with all the unexpected interruptions and events. As such, it is concerned with a holistic view. However, care needs to be taken to ensure that both observer and appraisee are clear about what they expect from it.

# NEW OPPORTUNITIES FUNDING: ICT TRAINING

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The focus of New Opportunities Funding (NOF) has been to train teachers to make sound decisions about when, when not, and how to use ICT effectively in teaching particular subjects. The effectiveness of this type of training in schools can be illustrated by the following case studies.

### Case study 23.1

#### New opportunity initiative

West Borough County Primary School, Maidstone, Kent completed its Kent IT in Schools (KITSch) NOF-funded ICT in Subject Teaching training in July 2001. Over the course of the 35-week programme 18 teaching staff engaged in six face-to-face training sessions and utilised paper and web-based resources (at [www.cant.ac.uk/kitsch](http://www.cant.ac.uk/kitsch)) in order to develop their use of ICT within subject teaching. When asked what impact she thought the KITSch training had had upon the school, Diane Hawkins (ICT Co-ordinator) described an increase in both teachers' and pupils' confidence in using ICT, and an increasing use of ICT by staff for the purposes of planning and preparation.

Examples of work undertaken by teachers and pupils included the creation of geometric shapes using SuperLogo, the use of a painting package to simulate pointillism artwork and the design of posters and adverts using desktop publishing software. The school has also created its own website ([www.west-borough.kent.sch.uk](http://www.west-borough.kent.sch.uk)). This displays many examples of pupils' work plus resources created by teachers for teachers, usefully linked to the QCA Schemes of Work. Resources such as PowerPoint presentations created by both teachers and pupils can be found here.

This well-designed and easy to navigate website has gained national interest, winning the whole-site award in the Becta/Guardian UK Web Site Awards in 2002.

The teaching staff and pupils at West Borough County Primary School clearly make every effort to utilise fully the power of ICT to support teaching and learning within the classroom. This school has much to be proud of.

The support of the senior management team combined with the commitment of the teachers and teaching assistants was a key factor in the success achieved within this school.



## Case study 23.2

### Teaching assistants

Teaching assistants (TAs) throughout Kent and beyond were given the opportunity to take part in the Kent IT in Schools (KITSch) NOF ICT in Subject Teaching Programme of Study.

Not only have all teaching assistants been able to gain benefit from using the paper-based materials and online resources contained within the KITSch website – [www.cant.ac.uk/kitsch](http://www.cant.ac.uk/kitsch) – they have also been able to use the dedicated online conferencing facilities to communicate across a wide area specialist network that spans the UK. Through this mechanism they have exchanged ideas, shared files, links and good practice and much more. Working collaboratively has saved valuable time and increased their knowledge, skills and understanding of the use of ICT in subject teaching as well as for administrative purposes.

Accreditation for Teaching Assistants includes: an Introduction to Supporting Teaching and Learning using ICT (Level 1); and Supporting Teaching and Learning using ICT (Level 3), which is now available through the Faculty of Education at Canterbury Christ Church University College (CCCUC).

For further information go to: [www.dfes.gov.uk/nof](http://www.dfes.gov.uk/nof)

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## Chapter 24

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# MANAGEMENT DEVELOPMENT

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Successful schools do not simply happen: they are successful because people make them so and all such people have a stake in management. It is the task of management to create the conditions that enable teachers and pupils to achieve effective learning. Management development is the means of increasing the capacity of school management to undertake this task. There is a range of management development activities (Wallace, 1986), which are shown in the following checklist.

### Checklist

#### Management development activities

Action-centred leadership	Action learning	Assertiveness training
Award-bearing courses	Brainstorming	Case studies
Coaching/counselling	Consultancy	Critical friendship
Development training	Distance learning	External training programmes
Intervisitation	Job description	Job enrichment
Job rotation	Job swap	Learning contract
Management review	Networking	Peer-assisted leadership
Performance appraisal	Private study	Quality circles
Self-development	Short course	

### SKILLS TRAINING

Joyce and Showers (1980b) are leading educationalists in the field of professional development. They distinguish between two aims for skills training – the ‘fine-tuning’ of existing teaching skills and the learning of new ones.

In-house training will need to relate to practice, professional and personal development. Joyce and Showers (1980b) identify four potential levels of impact:

- 1 general awareness of the new skills
- 2 organised knowledge of the concepts and theory underlying the skills
- 3 learning of principles and skills ready for action
- 4 transfer and application of the new skills to the classroom and integration into the teaching repertoire.

Having determined the areas of impact, Joyce and Showers define five principal training methods or components:

- 1 presentation/description (e.g. via lecture/discussion) of new skills and underlying theory
- 2 modelling the new skills (e.g. via live demonstration or video)
- 3 practising the new skills in simulated and controlled conditions (e.g. with peers or with small groups of children)
- 4 feedback on performance of new skills (e.g. using a structured system/instrument or unstructured discussion) in simulated and/or real settings
- 5 teaching for application, transfer and integration via in-classroom and in-school assistance from peers and from trainers.

Figure 5.4 illustrates the effectiveness of the process of professional development on specific skills. Readers will note the impact of each training method on the effectiveness of professional development, as indicated by ticks in the boxes.

Training method/components \ Level of impact	A General awareness of new skills	B Organised knowledge of underlying concepts and theory	C Learning of new skills	D Application on the job
1 Presentation/description (e.g. lecture) of new skills	✓	✓	✓	✓
2 Modelling the new skill (e.g. video)		✓	✓	✓
3 Practice in simulated settings			✓	✓
4 Feedback on performance in simulated or real settings			✓	✓
5 Coaching/assistance on the job				✓

**Fig. 5.4 Impact of training methods on professional development**

Source: Bolam (1993)

It can be concluded from the above that in order to achieve high impact in-house, courses should encompass:

- awareness raising – identification of courses
- knowledge and understanding of information, concepts and skills
- experience and evaluation of performance – practice and feedback
- planning to improve and support performance, on the job – whole-school and action plan
- coaching/mentoring – support for and improved performance on the job.

Senior managers and professional development co-ordinators should consider these factors if staff are to gain relevant experience from in-house professional development courses.

More details on impact analysis can be found in Section 10.
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# Executive summary

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This section has led you through a range of opportunities available to you in school. Key points to consider are:

- Professional colleagues are often the most under-utilised resource in school
- Induction for newly appointed staff is vital if teachers are to fulfil their roles professionally
- Teachers may engage in a number of mentoring relationships; mentoring roles will differ according to need, e.g. career or support
- Self-development is systematic, beginning with self-evaluation and leading to the identification of available choices and self-development opportunities
- Teams exist in primary and secondary schools. For a team to be effective it is essential for members to know their role, know their team, and know their managers
- There is a range of possibilities for in-house courses
- Job exchanges are possible in schools; the key is preparation and planning. Job shadowing is also a good method of getting close to someone's job
- Management teams also require training; a range of activities exists
- The effectiveness of courses is determined by the impact of training methods on professional development.

The next section will further explore school-based training through whole-school INSET.

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# Workshop materials

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5.3 Positive reasons for working as a team	138

## Workshop 5.1

### INDUCTION OF NEWLY QUALIFIED TEACHERS

The National Union of Teachers (1993) issued guidance on good practice by schools and LEAs in relation to induction. Use this as a checklist to assess your practice:

<b>Schools and LEAs need to:</b>	<b>YES/NO</b>
<ul style="list-style-type: none"> <li>● avoid placing NQTs in supply or peripatetic posts; or posts that present unusual problems of discipline or require special teaching techniques without special support</li> <li>● establish guidance and training for those involved in interviewing and appointing new teachers and for those assuming responsibilities as professional tutors or mentors</li> <li>● ensure that NQTs can demonstrate their proficiency in teaching classes of a size normal for the school and subject in a post that is closely related to the age group and subject for which they have been trained</li> <li>● set up induction programmes that make differentiated provision, based on an analysis of individual need, to support new teachers who come from a wide variety of backgrounds and experience</li> <li>● determine their respective responsibilities for the induction training each is expected to provide, and its timing</li> <li>● set up monitoring and evaluation procedures that can identify good practice and make possible its dissemination.</li> </ul>	

<b>Furthermore, schools and LEAs will need to:</b>	<b>YES/NO</b>
<ul style="list-style-type: none"> <li>● pay particular attention to the impact of local management of schools (LMS) on their relationships, so that there are no gaps in their responsibilities for the appointment and induction of teachers</li> <li>● maintain monitoring and reporting procedures that ensure that LEAs are aware of and are able adequately to support all NQTs in schools maintained by them</li> <li>● agree what professional skills need to be acquired by newly qualified teachers by the end of their first year of teaching to help each plan their support</li> <li>● teacher training institutions can help by identifying clearly the skills possessed by their students who have just been awarded qualified teacher status (QTS)</li> <li>● look carefully at the provision of training for newly qualified teachers to ensure that it is most efficiently and effectively provided.</li> </ul>	

## Workshop 5.1 (continued)

<b>More specifically, the following should be made available to an NQT:</b>	<b>YES/NO</b>
<ul style="list-style-type: none"> <li>● the opportunity to visit the school to meet the headteacher, the head of department where appropriate and fellow members of staff</li> <li>● information from the school in the form of a staff handbook or similar document giving useful facts about the school's curriculum organisation and management, staff structure, staff training and development policy, discipline, extra-curricular activities, relationships with the local community, and other relevant information</li> <li>● adequate notice of the timetable to be taught</li> <li>● all curricular documents, including statutory documents relating to the National Curriculum, relevant to the subjects they will teach</li> <li>● information about equipment and other resources available for use, including information technology</li> <li>● information about support and supervision provided by the school and, in the case of LEA-maintained schools, any additional support provided by the LEA.</li> </ul>	



Remember, induction should ideally be viewed as a whole-school responsibility. It is important that school policies and joint aims and objectives are discussed at the earliest opportunity with the new teacher. Written policies agreed on a whole-school basis, e.g. for curriculum areas, should be made available to the new teacher. Schools are urged to discuss their induction procedures with the whole staff at the earliest opportunity, so that these in turn can be made known to the new teacher. Of particular importance is the need to agree on:

- who will be the teacher/tutor and their formal responsibilities in relation to the new teacher and who will adopt the more informal 'mentor/professional friend' role if the two are distinct
- what training this person requires
- the procedures for observing and evaluating the progress of the new teacher (these should be made clear to the new teacher at the outset)
- the balance between written 'evidence' of progress and casual observation that will be required
- procedures to be followed where difficulties are identified.

Inspectors and advisers in many LEAs have considerable experience of successful induction schemes for new teachers. Their expertise and experience should underpin the future development of induction programmes for newly qualified teachers.



## Workshop 5.2

### DEVELOPING TEAMS

The following exercise could be used with different teams within the school, e.g. year, key stage, subject and department. It aims to review and examine team aims, their implementation and resourcing needs. This exercise could form part of an INSET day or an evening (twilight) session. The exercise could be facilitated by a senior member of staff or middle manager with team-building experience.

#### Team development plan

Aims:        To examine team aims  
                 To examine teaching and learning styles/differentiation  
                 To identify areas of weakness in resourcing

Time:        1 hour 30 mins

#### Stage 1 (5 mins)

Brainstorm the context in which you are working (size of primary school year group/key stage/team/school/local authority). Consider all factors inside and beyond the school and write these up on a flipchart

#### Stage 2 (15 mins)

Divide into two groups. Look at the school aims. How do the department/team aims reflect those of the school? Write on a flipchart what the aims should be – how can you implement them?

#### Stage 3 (10 mins)

Share your ideas with your team/department

#### Stage 4 (10 mins)

Working individually, describe how you organise your teaching/tasks. Compare notes with a colleague

#### Stage 5 (20 mins)

In your team/department, discuss successful strategies for raising achievement through planning/completing tasks/teaching and learning styles. List, ready for presentation

#### Stage 6 (10 mins)

Review your working environment – complete the grid on p. 137

#### Stage 7 (10 mins)

Discuss in your team/department how to improve the school environment

#### Stage 8 (10 mins)

Reflect on the tasks completed today – how can you take responsibility for raising achievement and improving the school? List, ready for presentation

#### Presentation in the main hall (or suitable room)

## Workshop 5.2 (continued)

	YES/ NO
1 Are teaching/work areas close together?	
2 Do rooms have adequate storage space?	
3 Do all staff have access to an office and phone?	
4 Is heating/lighting adequate?	
5 Is the furniture satisfactory?	
6 Can the furniture be moved easily?	
7 Are there sufficient display areas?	
8 Are displays of a high standard?	
9 Are classrooms clean/attractive/inviting?	
10 Is security adequate?	
11 Are working areas carpeted?	
12 Are there sufficient power points?	
13 Is audio-visual equipment accessible?	
14 Are blackboards/whiteboards in good condition?	
15 Do the rooms need decorating?	

## Workshop 5.3

### POSITIVE REASONS FOR WORKING AS A TEAM

This exercise (Armstrong et al., 1993) could be whole-school or team-based. It aims to establish positive reasons for working as a team and could form part of an INSET day or an evening session. The exercise could be facilitated by a senior member of staff or middle manager with training experience.

#### Working as a team

**Aims:**

- To establish positive reasons for working as a team
- To identify the qualities most needed to work successfully as a team
- To establish strengths and weaknesses within school teams so that negative attitudes can be marginalised

**Time:** 45 mins

#### Stage 1 (10 mins)

Working in pairs, brainstorm the advantages and disadvantages of working in teams. Complete the following grid

Advantages	Disadvantages

#### Stage 2 (10 mins)

In pairs, select from the following the ten qualities you most appreciate in colleagues when working in a team. List the qualities in rank order

### Workshop 5.3 (continued)

Qualities for team work	Order
Loyalty to leader	
Stubbornness	
Determination	
Ambition	
Desire to be liked	
Courage	
Ability to work hard	
Creativity and imagination	
Sense of humour	
Popularity	
Punctuality	
Confidence	
Dependability	
Desire to lead	
Enthusiasm	
Ability to initiate	
Eagerness to try new things	
Good organisation	
Single-mindedness	
Willingness to listen	
Willingness to share	
Social skills	
Common sense	
Intelligence	
Patience	

**Stage 3** (10 mins)

Discuss your findings with the group

**Stage 4** (15 mins)

Identify areas for development: list the strengths and weaknesses of teams at the school.



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## Section 6

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# WHOLE-SCHOOL IN-SERVICE EDUCATION FOR TEACHERS

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In-service education and training (INSET) is most likely to have an impact if it is matched to institutional curriculum needs. In the great majority of institutions where INSET has led to change, INSET needs had been systematically identified and the expected outcomes of training clearly identified. Training that is not part of an overall plan or strategy has a limited effect on the institution as a whole.

INSET is a very important part of professional development. This section provides guidance to ensure that:

- goals are identified in consultation with all staff
- the means to reach those goals are agreed both collectively and within teams or departments and also with individuals as appropriate
- realistic targets in terms of time and resources are agreed
- the goals and means of reaching them are monitored and evaluated
- the goals are modified accordingly.



# PLANNING INSET

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The training of staff is critical to the development of a school. Whole-school in-service education for teachers was considered by the government to be a suitable mechanism to implement development and, more specifically, change. Since the Education Reform Act (1988), five days per academic year have been allocated to staff development in all schools. The majority of this time has been utilised to accommodate whole-school INSET programmes. The effectiveness of such training programmes in terms of impact on practice has been limited (TTA, 1994). The limitations are due, in part, to lack of planning and management.

The identification of need is the starting point for any in-house training, and it begins with the analysis of training needs. As stated earlier (p. 123), a gap analysis is needed between what is happening in school and what is intended to happen. The gap is between:

- actual performance indicators and target performance indicators
- the evidence of the school review and the school development plan
- school actual results and planned results
- the knowledge and skill possessed by staff and the knowledge and skill shown by job analysis or skills analysis to be required
- actual appraised performance of individuals and the target performance.

Professional competencies of the successful teacher are identifiable as :

- Knowledge and understanding:
  - 1 knowledge of children and their learning
  - 2 subject knowledge
  - 3 knowledge of the curriculum
  - 4 knowledge of the teacher's role.
- Skills:
  - 1 subject application
  - 2 classroom methodology
  - 3 class management
  - 4 assessment and recording.

## **Checklist**

### **Criteria for effective INSET**

- Recognition on the part of teachers of their training needs in relation to the objectives of the school and the LEA
- Support of the headteacher and other staff
- A coherent school and LEA policy
- Precise targeting of provision
- Choice of appropriate form of INSET, whether school-based or externally based
- Fulfilment of appraisal targets
- Choice of appropriate length of course and mode of attendance
- Practical focus
- Appropriate expertise on the part of the higher education institutions offering INSET
- The appropriate follow-up in schools.

*Source: GTC (1993, p. 11)*

Planning for INSET will require several months of review and consultation. Staff should not be expected to accommodate suggestions immediately. As professionals, teachers should view the place in which they work as a place of learning. Within the framework of continuing professional development, self-development and staff development are prerequisites for effective management and effective schools. Equally, a precondition and an outcome of effective continuing professional development policies is a culture that encourages reflection and development.

INSET programmes should be planned by a team representing the views of all staff. An example of a worked programme is given in Workshop 6.1 at the end of this section. Once planned, the programme should be circulated and views sought from colleagues on appropriate approaches to each element. The final details should reflect staff needs and concerns. These should relate directly to pupil needs. INSET is only part of the process of developing, implementing and reviewing change. It is not a panacea, but should be placed in the context of practice. If change is needed, it should be considered within the priorities of the school development plan. Planning for INSET will require several months of review and consultation.

Teachers and support staff should be trained in a professional manner. The style, content and relevance of INSET should be complemented by appropriate management. The exemplars of good practice have shown the importance of teaching and learning styles in training programmes.

## KEY ISSUES FOR CONSIDERATION

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- A headteacher who considers that a ‘stand-and-deliver’ approach to training will encourage **staff participation** could be considered naïve. Staff need an approach that is supportive in order to feel confident that their contribution will be respected and valued. Staff should be given the opportunity to reflect individually and in groups on the material presented during training. Relevant information should be circulated in advance to enable staff to consider their position in relation to important policies, procedures and practice.
- The **presentation of the material** should be varied and interesting. A lot of printed words will generate little response from staff with busy professional lives. Relevant information should be presented in a succinct, accessible style. Long lists or meaningless prose will not be appreciated. Staff need to engage with key issues in an informed way. Staff need to know and understand the essential points that relate to their practice in order to make a judgement.
- INSET should focus on **issues that are relevant** to the individual school and which will lead to a confirmation or change of practice. Staff need to feel confident that they are working with colleagues they trust if they are to be open about such an emotive subject. INSET co-ordinators need to plan their groups with care, not allowing dominant individuals who do not ‘have a problem’ to lead or intimidate others. All staff should be committed to an open, honest approach to discussing individual and whole-school problems. The use of case studies will enable staff to share concern about a particular problem. All discussions should be solution-oriented.
- The **frequency of INSET days**, half-days or twilight sessions will also influence the quality of the programme and subsequent outcomes. Isolated days that are scheduled in a random manner throughout the year will not promote active, all-inclusive debates on policy, procedure and practice. Time needs to be invested in building a positive, supportive atmosphere among staff. Given the restrictions of the school day, whole days of training followed by twilight sessions may provide the most appropriate structure. Senior managers and INSET teams would have to consider this aspect of organisation in their planning.
- The **venue** is also important. It is sometimes beneficial to use an off-site venue to generate the right atmosphere in which teachers can feel confident. When INSET is school-based, the careful selection of rooms, chairs, tables and display equipment is important. The room should be large enough to accommodate the group, without being too large. Chairs should be comfortable – not at varying heights, or in rows. Tables should be provided if staff are expected to write. Display equipment (video, overhead projector and flipcharts) should be visible to all. Technical equipment should be checked before the session. If staff require pens/pencils and paper, these should be available.

## SUBJECT-BASED INSET

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In the great majority of primary and secondary schools and in most areas of the curriculum, teachers have sufficient command of the subjects they teach and adequate pedagogical skills to teach them satisfactorily to the groups assigned to them. However,

there are some subjects where, in a minority of schools, teachers' command is weak or where there are serious weaknesses in key aspects of methodology, such as the appropriateness of activities and the pace and challenge of lessons. Local circumstances and national shortages mean that some schools are unable to provide specialist teaching for all their pupils, so that some teachers are obliged to teach lessons in subjects in which they lack adequate qualifications and/or experience. In primary schools, where all staff teach all subjects, it is difficult for subject co-ordinators to provide sufficient guidance. There is often a lack of confidence and knowledge. Additionally, many teachers are ill equipped to deal with the need to teach basic literacy skills to pupils who have fallen behind their peers.

In all subjects, the knowledge required of teachers evolves continuously; in some, maintaining a sufficient level of skill demands opportunities for practice beyond the teaching situation. Changes in curriculum content also need to be understood and applied. Rapid technological changes, particularly in IT, likewise demand that teachers keep abreast of the possibilities these offer to improve the teaching of their subject. For all these reasons, regular and systematic subject-specific staff development through in-service training, both for specialists and for non-specialists, remains a major concern if schools are to maintain and improve their effectiveness.

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## Chapter 26

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# USING A CONSULTANT

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The DfEE (2001b) recognises the value of external provision, but places certain conditions in the form of a Code of Practice for CPD providers. These conditions mirror many of the characteristics of effective CPD identified in the previous chapter. They include:

- delivery of suitably skilled and experienced trainers
- materials of a high standard (content and presentation)
- differentiation to meet all participants' needs
- a well-prepared venue
- content and processes informed by recent, relevant research/inspection evidence.

### Checklist

#### Why employ a consultant?

- When the specialised expertise of the consultant is not available in the school or LEA
- When those within the school who have the expertise to train others are overstretched by other work
- When support is needed for an in-school training programme in planning, in delivery or in using the consultant's wide experience to compare the programme with others
- When the consultant has carried out a larger programme in the school of which training forms a part.

As O'Brien and MacBeath (1999, p. 76) suggest, consultants need to understand that:

- development must be in a supportive climate
- providers must understand the context
- development and change happen if people see an advantage
- teachers must be seen at different stages of career and personal development
- development is active, not passive.

## **Checklist**

### **How to manage a consultant**

- Is the consultant reliable? Check with previous clients, discuss achievements, ask to see written references and feedback.
- What is the problem? The client must be clear exactly what it is that the consultant is being asked to do. Expect the consultant to press this point until it is absolutely clear, maybe helping to redefine the problem or to uncover any hidden agenda. Does the consultant suit the problem?
- What results are expected? The consultant will be as anxious as the client to have a desired goal or target state of affairs. Write up a brief form of job description or contract in which the task is agreed.
- Manage the consultant – do not let the consultant manage the client work: meet frequently, facilitate, make arrangements, make people available, learn from the way the consultant operates.
- Give the consultant feedback during the consultancy and at the end. Feedback can help the quality of performance, just as it can with employees. If there is to be a final report, discuss it with the consultant before it is finally presented: it should contain no surprises if the client has stayed in contact.
- Expect follow-through. Beware of consultants who produce recommendations but cannot help to implement them. Consultants should be willing to face any technical or political difficulties of implementation or to train staff in new skills. Expect as well a return visit from the consultant to discuss the success of the consultancy.

# MONITORING INSET

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In most schools, the monitoring of INSET and the evaluation of its effectiveness and impact on classroom practice remain unsystematic (see Section 10). Even where these are undertaken, few schools use the results to inform their future planning. Too little attention is given to the impact such training has on classroom practice and on the raising of standards, and arrangements for dissemination are generally unsatisfactory.

The Office for Standards in Education (OFSTED, 1996b) advises that schools need to consider:

- how to monitor INSET provision more closely and systematically
- how they might evaluate INSET, to determine its impact on improving subject teaching and raising standards of pupils' achievements
- giving greater attention to dissemination and to follow-up activity, to sustain the momentum of training, to broaden expertise and to share good practice
- making IT an INSET priority: teachers should have sufficient familiarity with a range of IT facilities and the skill to apply these to the teaching of their subject
- the INSET needs of teachers and support assistants concerning provision for pupils with special educational needs, in order to help them deliver the teaching programmes devised for individual pupils.

The following checklist relates subject-based INSET to classroom practice.

### Checklist

#### How to evaluate the effectiveness of INSET

Where INSET is seen to be having positive effects, these include:

- a more confident grasp of subject knowledge
- a heightened awareness of different teaching methods
- a sharper approach to matching work to pupils' needs
- more effective questioning techniques
- better curriculum documentation
- closer collaboration between special educational needs (SEN) support staff and class teachers.

The characteristics of such INSET are:

- detailed planning and close match to identified need
- clear objectives agreed with participants
- clear relationship to classroom needs
- use of teachers' prior knowledge and experiences
- adequate provision of follow-up activity
- a mutually supportive but self-critical staff, committed to the raising of standards
- support, encouragement and realistic expectations by senior management.



# INSET AND PERFORMANCE MANAGEMENT

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Whole-school in-service education for teachers should relate directly to the performance management process. Teachers' needs should be identified and targets set in the context of the school development plan. It is important to identify these needs and, where possible, plan whole-school INSET to accommodate training. This ensures that the performance reviews are completed and that INSET is relevant. The following points should be considered as factors leading to effective INSET related to performance management:

- training needs are identified at school level following reviews and the drawing up of the school development plan
- the teachers whose needs are identified are the ones selected for training; there are no substitutions; more than one teacher attends from each school
- heads/senior managers are fully aware of the purpose of the training and the expected outcome
- the training forms part of a coherent programme and is not a 'one-off'
- the training requires preparatory work by the teachers
- the training is sufficiently extensive to allow work in school before and between sessions, to enable reflection and consolidation
- trainers are fully briefed
- training groups are comparatively homogeneous or the training is targeted to the identified needs of the participants and sufficiently differentiated to take account of their varying levels of expertise
- the range of provision includes on- and off-site courses, guided reading, classroom support, support groups and distance-learning materials
- dissemination strategies are built into the course – participants are given the time to disseminate what they have learnt and are encouraged to do so
- training is followed up by some form of support in school.

The following case study describes an INSET programme focusing on behaviour management.

### Case study 28.1

#### Demonstrating good practice

An example of good practice is a course that emanated from a collaborative approach to INSET in a large suburban co-educational primary school and is also applicable to secondary schools. Teachers had expressed concern over increasing problems with individual pupils and classroom management. They felt that the existing discipline policy and procedures did not meet pupil needs. As a consequence, teachers were highly stressed, and staff and pupil absenteeism was prevalent. The headteacher, in consultation with LEA support agencies and his staff, devised a course that focused on managing behaviour. The course programme was based on a series of examples of good practice demonstrated on video, including:

- positive correction
- consequences
- prevention
- repair and rebuild.

The course ran during twilight sessions over a six-week period. The following statement introduced the courses:

*Behaviour management is an important area when considering raising expectations. Issues about behaviour and discipline are in the frame each and every working day and new and proven strategies are surely welcome to [all teachers].*

Source: Priest (1997)

The value of this course was in its common-sense, jargon-free strategies of helping teachers prepare for dealing with the situations that are likely to occur in the classroom:

- the child who refuses to leave the room
- the child who answers back
- the noisy classroom.

The examples were all the more convincing and absorbing because the presenter comes across as a colleague, speaking from experience and explaining strategies that clearly work in the classroom.

In the first of the examples, positive correction, the presenter states the painfully obvious truth that most teachers under stress will correct a pupil from feelings of anger rather than in a reasoned, calm and rational way. It is explained that behaviour management is an emotional issue, but that there are more efficient and successful methods of correction than resorting to intrusive and confrontational ways. Amongst the strategies discussed and demonstrated in classroom settings are the following:

- tactical ignoring by teachers
- distraction and diversion
- cool-off time and rule reminders.

‘Take-up time’ is also defined; this gives a pupil enough time to do what the teacher asks and enough time to allow both of them to save face.

The second example, consequences, deals with the emotive issue of bullying and how to deal with a pupil who rushes out of the classroom. It highlights the importance of children being helped to make connections between their behaviour and the result that has come about. It also emphasises the importance of 'certainty' rather than 'severity', and by this stresses crucially that there is always follow-up by the teacher after an incident, even if it is not possible at the end of the lesson or day.

The third example, prevention, looks at how schools can maximise positive behaviour by way of a structured framework and approach, used and agreed by all staff.

The final example, repair and rebuild, explores skills and strategies to encourage pupils to respect the rights of others and to take responsibility for their own behaviour. This could be linked with the Code of Practice (DfE, 1994). It also deals with how teachers can restore strained relationships and break the cycle of attention-seeking and power games.

The examples were eminently suitable for staff discussion on behaviour management. If staff could be encouraged to attend more INSET programmes in this area, the headteacher was confident that the videos could form the basis for very worthwhile discussion as they provide a visual, rather than written, stimulus that is a welcome and accessible source on the subject.

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# Executive summary

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This section has focused on the planning, management and delivery of a whole-school in-service education for teachers programme. Key points to consider are:

- INSET is a very important part of professional development that requires detailed planning involving all staff
- Staff should recognise their training needs in relation to the objectives of the school and LEA
- Performance management should be linked to INSET
- INSET should be followed by action plans, monitoring evaluation and review.

Now that whole-school INSET has been examined, the next section presents details of national initiatives: external agencies.

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# Workshop materials

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## Workshop 6.1

### INSET PROGRAMME – MANAGERS AND LEADERS

Workshop 6.1 presents a worked programme for senior management teams. Whole-school in-service education should begin with an analysis of values and beliefs. This programme is a worked example of middle and senior management development. It aims to take participants through a variety of activities relating to leadership, management and administration. The programme was designed and facilitated by a university-based consultant. As a model, it is applicable to primary and secondary schools.

Friday	6.00	Welcome
	6.15	Beliefs and values
	6.45	Vision and mission
	7.15	Teams
	7.45	Dinner
Saturday	9.00	Classroom management learning
	10.00	Targets
	10.45	Break
	11.00	Staff development
	11.30	Communication
	12.30	Lunch
	1.15	Planning
	2.15	Evaluation – health checks
	3.15	The way forward? Roles and responsibilities
	4.15	Summary and action plan

## Workshop 6.2

### MANAGEMENT VALUE STATEMENTS

Workshop 6.2 provides examples of proformas that can be completed by staff. A shared understanding of colleagues' values and beliefs will provide a starting point for whole-school development. Where differences occur, these should be accepted and respected. The following exercise can be used with the whole staff or small teams. The aim is to determine values held by staff. Part 1 requires participants to state what they value and what they do to reflect their values in practice. The referencing and comment columns are for editorial and development work following Part 2 of the exercise.

Part 2 again asks participants to state what they value but asks for a behaviour statement, e.g. how they relate to each other, or how they talk to their students. Again, referencing and comments are required for editorial purposes and development. The facilitator would have the task of coding and editing each response and guiding participants as to the identification of shared values.

The facilitator should be someone external to the organisation, with expertise in management processes.

This exercise could lead to a more specific exercise on school development planning: vision/mission statements.

<b>Part 1</b>			
<b>Reference</b>	<b>What we value</b>	<b>What we do</b>	<b>Comment</b>

**Workshop 6.2 (continued)**

<b>Part 2</b>			
<b>Reference</b>	<b>Value</b>	<b>Behaviour statement</b>	<b>Comment</b>



## Workshop 6.3

### MANAGEMENT AND LEARNING

Workshop 6.3 provides a series of evaluative questions that enable practitioners to develop a shared understanding of the relationship between management and learning.

This exercise can be completed individually or in groups as part of a team or whole-school INSET session (day or twilight). The aim is to evaluate practice, focusing on the evaluation of management issues and their impact on pupil learning.

The choice of facilitator would depend on the size of the group. Subject teams could be led by their co-ordinator; whole-school staff could be led by a senior manager. It would be useful if responses were shared among colleagues with the aim of improving practice.

Teachers may consider their role in terms of pupils, parents, school and community. Questions relating to classroom management and learning could be structured in an objective way (Brighouse, 1978):

<b>Teacher with pupils</b> <ul style="list-style-type: none"> <li>● To what extent am I aware of, and do I take account of, individual needs?</li> <li>● Am I aware of pupils with particular problems?</li> <li>● How do I deal with them?</li> <li>● How do I respond to poor attendance?</li> <li>● How do I respond to behavioural problems?</li> <li>● How well do I know my pupils?</li> </ul>	<b>Comment</b>
<b>Teacher with parents</b> <ul style="list-style-type: none"> <li>● Do I know the parents?</li> <li>● How effectively do I communicate with parents?</li> <li>● Is there a shared understanding of how their child should behave, and about attendance?</li> <li>● Is the home situation stable or changing?</li> <li>● How well do I know the family?</li> </ul>	<b>Comment</b>
<b>School and its environment</b> <ul style="list-style-type: none"> <li>● What is the general appearance of the school like – playground, corridor, classroom, lavatories, playing fields?</li> <li>● Who ensures that displays are of quality and reflect all pupils' work?</li> <li>● What is the manner in which pupils move around the school between lessons, during breaks and at the start and end of the day?</li> <li>● How would the noise level be described?</li> </ul>	<b>Comment</b>

## Workshop 6.3 (continued)

<p><b>School and its practice</b></p> <ul style="list-style-type: none"> <li>● What is the provision for pupils with behaviour problems?</li> <li>● How are teaching and non-teaching staff supported when dealing with discipline-related matters?</li> <li>● What staff training opportunities are there?</li> <li>● How well does the school communicate with LEA support agencies and advisers?</li> <li>● How effective is the discipline policy?</li> <li>● Does policy reflect practice?</li> <li>● Are there sufficient discipline procedures and practices to support staff and pupils?</li> <li>● Praise, rewards and sanctions – what are used and why?</li> <li>● What opportunities are given for the development of initiative and responsibility?</li> <li>● What is the procedure for checking lateness and absence?</li> </ul>	<p><b>Comment</b></p>
<p><b>School and communication</b></p> <ul style="list-style-type: none"> <li>● How does the school communicate with members of the wider community?</li> <li>● Are there adequate opportunities for all members of the school community to express their views?</li> <li>● What consultative process is used to help arrive at policy decisions related to discipline?</li> <li>● What are the links with the EWO (education welfare officer), educational psychologist and schools' advisory service?</li> </ul>	<p><b>Comment</b></p>
<p><b>School and parents</b></p> <ul style="list-style-type: none"> <li>● How is a parent first introduced to the school?</li> <li>● How do parents personally meet members of staff?</li> <li>● Are there opportunities for parents to meet staff               <ul style="list-style-type: none"> <li>– as a matter of routine?</li> <li>– at their own or the school's request?</li> </ul> </li> <li>● Is there a parents' association? What are its functions? Is it effective?</li> </ul>	<p><b>Comment</b></p>

## Workshop 6.3 (continued)

- What are the various kinds of meetings held for parents? What proportion of parents attend meetings and how is information communicated to those who do not attend?
- Do parents know and understand the school's discipline policy, procedures and practices?
- How are parents aided and encouraged to be interested in helping their children to achieve their potential?
- Is there a home-school contract?
- How does the school meet family needs?
- Is information to parents communicated appropriately, in a language and style that is understood by members of the family for ethnic groups, translated into their own language?

### School and community

### Comment

- Does the school see itself as a focus of the community? How does it promote such an image?
- How does the school ensure good relationships with the local community?
- What is the relationship between the school and community?
- Are pupils involved in any way with local community service?
- Does the school have regular contact with the local family centre?
- How closely does the school work with social services in order to meet community needs?
- How well does the school relate to the cultural aspirations of the community in terms of behaviour, respect and family values?

The list of points to be considered in the evaluation is by no means exhaustive. All schools have their own needs, which should be identified, and the school's response to each should be evaluated. Much of the above is objective and school-oriented, however; teachers will have their own belief and value systems that also need to be evaluated.

## Workshop 6.4

### CLASSROOM MANAGEMENT AND LEARNING

Workshop 6.4 provides guidance on how staff should prepare for the classroom, with evaluative questions on pupils' experience of learning. This exercise is content-driven; it aims to guide practitioners to evaluate their practice. The exercise could be completed on an individual basis prior to an INSET session (day or twilight), leading to more focused, open discussion. Participants will need to understand the importance and relevance of self-evaluation and self-development (see Section 5).

Central to the management of discipline in schools is the level of self-esteem that emanates from the teacher. Teachers with low self-esteem will be unable to participate. Teachers can gain confidence by adopting a few straightforward procedures to meet their needs (Haigh, 1997, pp. 20–2):

- *Preparation*: reflect on the successes of the previous lesson, repeat these strategies, prepare lesson content around available resources, note any particular problems with pupils or class
- *Starting the day*: arrive early and take time to check whether everything that is required is at hand, rehearse lessons mentally and aim to make a good, confident start to each lesson; allow time to consult with colleagues about individual pupil and class needs
- *Colleagues*: be a good team player by making well-researched suggestions on strategies to overcome difficulties with disruptive pupils, listen to advice when offered, collaborate with all agencies to gain support, be assertive when appropriate
- *Senior managers*: do not waste time discussing their failings as managers or your own perception of their attitude towards your work, but find ways of working with them. They are busy people who may not feel that it is appropriate for them to deal with every discipline-related incident that occurs in their school. Be pleasantly assertive when you feel that your needs are not being met
- *Keep things under control*: teaching is filled with false starts, incomplete conversations, classes that arrive at the wrong time, pupils that behave in an irrational manner. Do not strive for all-round perfection, make priorities and be ready to say no; work within your limits
- *Pupils*: if discipline is a problem, it must also be made a priority before it starts to cause unacceptable stress. Do not cover it up; seek support from a mentor or understanding colleague and from sympathetic senior managers. A major difficulty with a particular pupil or class should be a whole-school issue and not a private problem. Be assertive, ask for time to talk about the problem, and make it clear that you need support. Try hard not to take a pupil's misbehaviour as directed personally to you. Take opportunities to discuss discipline problems with colleagues, senior managers and support agencies
- *Colleagues*: give feedback to them when you have received help; this will make both of you feel better and encourage others to support you
- *Get a life*: not participating in anything other than school is a downhill step and bad for self-esteem, for mental health and for the ultimate well-being of pupils
- *Keep fit*: feeling fit is good for self-esteem and helps to get you through a tiring week

### Workshop 6.4 (continued)

- *Focus on the manageable*: move the focus from teaching to particular teaching tasks. An alternative approach to thinking that a class is difficult and beyond your ability to cope is to start thinking what, and who, makes the class difficult; then devise ways of dealing with these individual issues
- *Change direction*: if a school or area is not suited to you, move
- *Celebrate success*: it is in the nature of conscientious people that they dwell on things that go wrong. Try to think what has gone well; this will give you the energy to deal with problems as they arise.

Remember, teachers' perception of themselves will impact on the self-esteem and confidence of their pupils.

Managers need to know what the pupils' experience is on a day-to-day basis.

#### Consider:

#### Response

- 1 How often does the pupil negotiate the lesson outcomes?
- 2 How often, and for how long, does the pupil discuss the process of the work?
- 3 To what extent does the learning style meet the pupils' needs?
- 4 What is the ratio of praise to blame?
- 5 In written work, are processes and outcomes commented upon?
- 6 Does the pupil know the criteria for good or bad?
- 7 How does assessment apply to process?
- 8 What is the total length of time spent 'on task'?
- 9 To what extent is the pupil left to find their own way through?
- 10 How is the pupil encouraged to reflect?
- 11 How many learning styles does the pupil encounter in a day/week?
- 12 Is the pupil given the opportunity to demonstrate a range of competencies?
- 13 Are problems always assumed to have a solution?
- 14 Are pupils encouraged to find multiple paths through their learning?
- 15 Do reports to parents refer to learning styles?

## Workshop 6.5

### A QUESTIONNAIRE FOR TEACHERS

Workshop 6.5 focuses on learning; the questionnaire examines the relationship between process and outcomes. This provides managers with a lead into discussing teaching and learning styles.

This exercise would be very useful for subject-based teams. The aim is to determine where a teacher is in relation to teaching and learning styles. The exercise would be well placed at the start of a subject/department team meeting on course development/raising achievement. It could be facilitated by the subject co-ordinator/head of department.

Rate the following statements on a 1–5 scale (1 = agreement)

Rate

- 1 My job is to get across the facts
- 2 What the pupils need to know is in the textbooks and on the worksheets
- 3 Essentially, I have to be in control of the classroom
- 4 I have to decide on the learning outcomes
- 5 It's up to me to decide on whether the pupils have learnt something
- 6 I have to be in charge of the resources
- 7 The pupils do not need to know the end point; they just have to cope with each step
- 8 If the pupils do not learn something, they just need to work harder
- 9 There is a lot of material that the class must get through; that is the main task
- 10 I must look for the right answers.



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## Section 7

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# A FRAMEWORK FOR PROFESSIONAL DEVELOPMENT

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In 2001, the DfES published a strategy for professional development, *Learning and Teaching* (DfES, 2001a). This outlines the government's commitment to the development of practitioners and school leaders. Much of this policy is rooted in the government's desire to raise achievement in schools. Funding and training opportunities have been made available to support the policy.

This section focuses on the government's framework for practitioners:

- national standards
- the General Teaching Council – an emerging presence
- Investors in People.

# NATIONAL STANDARDS FOR TEACHERS

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The Teacher Training Agency (TTA) was established in 1994 by the government to review and develop the training of teachers. Central to the TTA's work is the issue of school effectiveness set within the context of the government's school improvement programme. The stated purpose of the Teacher Training Agency is to raise standards in schools by improving the quality of teacher training, teaching and school leadership, and by raising the status and esteem of the teaching profession.

The work of the government agencies and the emergence of the Teacher Training Agency led to a more structured approach to the issue of continuing professional development. In 1995, the agency commissioned MORI to survey teachers on the value and effectiveness of INSET programmes. The results were disappointing. While INSET represented a huge investment nationally of around £400 million per annum, teachers were less than enthusiastic about the impact of existing programmes on improving their practice.

In response, the Teacher Training Agency has developed a structure of national standards for teachers in order to promote well-targeted, effective and co-ordinated continuing professional development. The national standards framework is designed to:

- establish clear and explicit expectations of teachers
- help set targets for professional development and career progression
- help to focus and improve training and staff development at national, local and school level
- ensure that the focus at every point is on improving pupil achievement
- recognise the expertise required and held by effective headteachers and teachers in schools.

National standards provide a focus for professional development for:

- newly qualified teachers
- advanced skills teachers
- subject leaders – National Professional Qualification
- special educational needs co-ordinators – National Professional Qualification
- aspiring headteachers – National Professional Qualification for Headship
- serving headteachers – National Professional Qualification for Serving Headteachers.

Table 7.1 indicates the relationship between the TTA national standards and positions of responsibility in schools.

National standards	Position of responsibility
Initial Teacher Training	Student
Newly Qualified Teachers	Practitioner following induction/mentoring
Advanced Skills Teacher	Mentor to new appointees/NQTs/colleagues
National Professional Qualification for Subject Leaders	Head of department Key stage co-ordinator Subject co-ordinator Head of year
National Professional Qualification for Special Educational Needs Co-ordinators	Head of special educational needs
National Professional Qualification for Headship	Deputy headteacher/aspiring headteacher
Headteachers' Leadership and Management Programme	Newly appointed headteacher
Leadership Programme for Serving Headteachers	Headteacher

**Table 7.1 TTA National standards in relation to positions of responsibility in schools**

## **MANAGEMENT**

The TTA recognised that a focused approach to management and leadership was required, encompassing:

- strategic leadership
- organisational leadership
- teaching and learning
- community leadership
- staff appraisal and development
- school effectiveness.

The National Professional Qualification for Subject Leaders, the National Professional Qualification for Headship, the Headteachers' Leadership and Management Programme and the National Professional Programme for Serving Headteachers illustrate the approach of the Teacher Training Agency to confirming professional development.

The National College for School Leadership (NCSL) controls leadership training programmes for aspiring, new and practising headteachers, and middle managers (subject leaders), and administers funding for Networked Learning Communities, enabling and encouraging schools and teachers to work collaboratively on issues of mutual concern and interests ([www.ncsl.org.uk](http://www.ncsl.org.uk)).

A further example of the government's continuing professional development strategy for teachers is that of the advanced skills teachers. This non-managerial route to promotion and higher pay is detailed later in this section.

## NATIONAL PROFESSIONAL QUALIFICATION FOR SUBJECT LEADERS (NPQSL)

The national standards set out the knowledge, understanding, skills and attributes that relate to the key areas of subject leadership. The standards define expertise in subject leadership and are designed to guide the professional development of teachers, aiming to increase their effectiveness as subject leaders or of those aspiring to take responsibility for leading a subject.

While standards apply to all schools, they will need to be applied and implemented differently in schools of different type, size or phase. For example, they will need to be used selectively in smaller primary schools, where headteachers may retain more of the defined roles than in larger primary schools. The degree to which subject co-ordinators in primary and special schools can use the specified knowledge, understanding, skills and attributes in order to carry out the key tasks in these standards will depend on their experience and the opportunities to develop their role. The subject leader standards are based on how experienced and effective co-ordinators provide leadership in their subject(s).

### NATIONAL STANDARDS FOR SUBJECT LEADERS

The core purpose is to provide professional leadership and management for a subject to secure high-quality teaching, effective use of resources and improved standards of learning and achievement for all pupils. The key areas of subject leadership are:

- **Strategic direction and development of the subject:** Within the context of the school's aims and policies, subject leaders develop and implement subject policies, plans, targets and practices
- **Teaching and learning:** Subject leaders secure and sustain effective teaching of the subject, evaluate the quality of teaching and standards of pupils' achievements and set targets for improvement
- **Leading and managing staff:** Subject leaders provide to all those with involvement in the teaching or support of the subject the support, challenge, information and development necessary to sustain motivation and secure improvement in teaching
- **Efficient and effective use of resources:** Subject leaders identify appropriate resources for the subject and ensure that they are used efficiently, effectively and safely.

The standards are in five parts:

- 1 Core purpose of subject leadership
- 2 Key outcomes of subject leadership
- 3 Professional knowledge and understanding
- 4 Skills and attributes
- 5 Key areas of subject leadership.

Although subject leaders must have a good grasp of the subject and lead by example through the quality of their own teaching, these standards focus primarily on expertise in the leadership and management of a subject. While some aspects of leadership and

management are generic, others are specific to the subject and type of school. Training and development for subject leadership will provide a good grounding in many of the leadership and management skills necessary to take on broader and more senior management roles.

Blandford (2000, p. 66) lists the purposes of the standards:

- *to establish clear and explicit expectations of teachers*
- *to help set targets for professional development and career progression*
- *to help to focus and improve training and staff development at national, local and school levels*
- *to ensure that the focus at every point is on improving pupil achievement*
- *to recognise the expertise required of effective headteachers and teachers in school.*

## **NATIONAL PROFESSIONAL QUALIFICATION FOR HEADSHIP (NPQH)**

The key principles on which the NPQH is based are: to provide a high-quality national professional qualification for aspiring headteachers that:

- draws on the best management practice inside and outside education
- provides an assurance to governors and others that the newly appointed headteachers have the necessary foundation of school leadership and management knowledge, understanding and skills to perform successfully against a national standard
- is rigorous enough to ensure that only those fitted for headship gain the qualification, while being sufficiently flexible to take account of candidates' existing proven skills and achievements
- drawing on existing good practice, incorporates national criteria to help candidates, headteachers, governors and LEAs review potential for embarking on the qualification
- provides a baseline from which newly appointed headteachers can, in the context of their new school, continue to develop their leadership and management abilities through the Headteachers' Leadership and Management Programme (HEADLAMP).

The NPQH sets out the knowledge, understanding, skills and attributes that relate to the key areas of headship. While more experienced headteachers will have different needs from their newly appointed colleagues, all headteachers are expected to provide leadership and management that secure high-quality teaching and learning and raise standards of achievement.

The standards are in five parts:

- 1 Core purpose of headship
- 2 Key outcomes of headship
- 3 Professional knowledge and understanding
- 4 Skills and attributes
- 5 Key areas of headship.

## **HEADTEACHERS' LEADERSHIP AND MANAGEMENT PROGRAMME**

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The HEADLAMP initiative placed the locus of choice and spending power with governing bodies and headteachers rather than with LEAs. All appointees to first headships are entitled to a grant of £2500 from the Department for Education and Employment (DfEE), via the TTA, to be spent within two years of their appointment in return for training received from HEADLAMP providers. The choice is wide; currently the HEADLAMP list of registered providers has 198 entries and these include HEIs, organisations such as Gallup and Relate, independent companies and partnerships, individual consultants and some, but not all, LEAs.

## **LEADERSHIP PROGRAMME FOR SERVING HEADTEACHERS**

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The national standards set out the knowledge, understanding, skills and abilities that relate to key tasks of headship in five key areas. The standards are designed to serve as the focal points for the training and development of both aspiring and serving headteachers. While more experienced headteachers will have different needs from their newly appointed colleagues, all headteachers are expected to provide leadership and management that secure high-quality teaching and learning.

The standards have been revised as a result of consultation on the NPQH, and build on the considerable work already done in this area by OFSTED, schools, LEAs, HEIs and other agencies. The standards also reflect the considerable work undertaken on management standards by those outside the education profession.

The headteacher is the leading professional in the school. Working with the governing body, the headteacher must provide vision, leadership and direction for the school and ensure that it is managed and organised to meet its aims and objectives. With the governing body, the headteacher is responsible for the continuous improvement in the quality of education: for raising standards, for ensuring equality of opportunity for all, for the development of policies and for ensuring that resources are efficiently and effectively used to achieve the school's aims and objectives. The headteacher is responsible for creating a productive, disciplined learning environment and for the day-to-day management and organisation of the school, and is accountable for this to the governing body.

The standards are in five parts:

- 1 Strategic direction and development of the school
- 2 Learning and teaching
- 3 People and relationships
- 4 Development and deployment of people and resources
- 5 Accountability for the efficiency and effectiveness of the school.

## ADVANCED SKILLS TEACHERS

The idea of an advanced skills teacher (AST) was first mentioned in the government White Paper, *Excellence in Schools* (DfEE, 1997b) as a means of providing a 'fast track' for excellent teachers who wish to stay in the classroom rather than taking on senior management posts. The objective is to appoint teachers in areas that receive special funding from the government to raise standards.

Advanced skills teachers will be classroom-based with extra duties, such as acting as mentors for NQTs and advising other teachers. They could spend up to 20 per cent of their time in other schools to help them disseminate best practice. They will have no management duties. Teachers would only be able to apply for AST posts after they had been licensed following an assessment process. The government intends that only a small number of teachers will become ASTs.

## OTHER STAKEHOLDERS

In addition to the National Standards (TTA 1998), professional development is linked to other stakeholders.

*CPD coordinators are the first link between the school and the teacher. It is essential that attention be paid to the needs of all stakeholders, which includes those who provide funds (Government agencies, LEAs and schools), the school (including the senior management team), pupils, parents and the teachers undertaking CPD themselves. The key stakeholders are The Department for Education and Skills (DfES), local education authorities (LEAs), Ofsted, the school, the individual teacher, pupils, parents and providers of CPD.*

- *The Department for Education and Skills (DfES) allocates the 'Standards Fund' to LEAs and schools. The department administers schemes to support individual teachers such as the Best Practice Research Scholarships (BPRS), sabbaticals and bursaries. It is essential that CPD coordinators are aware of such opportunities, and reference to the DfES website <http://www.dfes.gov.uk> provides up-to-date information.*
- *Local Education Authorities (LEAs) handle a proportion of the 'Standards Fund' and provide In-Service training opportunities, in order to address priorities contained within the LEA Educational Development Plan. LEAs have a responsibility to demonstrate that schools within the authority are collectively meeting performance-related targets. CPD coordinators must demonstrate how provision within the school addresses the LEA's development needs, and how the LEA can, in exchange, service the needs of teachers in schools.*
- *Ofsted is instructed to make judgements on the quality of individual schools' CPD provision, the effectiveness of this provision and to inspect CPD providers who receive public money to support the provision. The website address is <http://www.ofsted.gov.uk>*

Source: Field (2002, p. 6)



# THE GENERAL TEACHING COUNCIL

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The General Teaching Council (GTC) recognises that, as a government agency, it is working in partnership with the TTA and DfES:

*The TTA and DfES have in combination used the rafts of National Standards to develop a professional framework for teachers. Teachers are able to benchmark their performance against a set of standards appropriate to their position, and also to identify targets for development at higher professional levels. This serves as a useful basis for career development, in that it provides the opportunity for consistency and common ground when:*

- *talking about practice*
- *observing each other*
- *collaborating on the development and evaluation of materials*
- *teaching/coaching each other.*

Source: GTC (2002a)

As a strategy, the GTC advises schools and teachers to consider the following points (based on Carol Adam's presentation to the first CPD Update Conference (March 2002):

## INVESTING IN OUR FUTURE

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The key steps to continuous improvement are achieved by focusing on the quality of teaching and learning through professional *standards* and professional *development*.

### Why CPD is crucial for the teaching profession

- Teachers are at the heart of realising a sustainable future; investment is needed for *qualitative* improvement in teaching
- Teachers must lead ideas about teaching and learning
- A sense of confidence must be renewed across the profession
- People must be encouraged and inspired to join and stay in the profession.

### **Learning communities**

- Schools as learning communities with teachers setting standards for their own development
- Articulation of professional learning and practice
- Professional portfolios and career long learning.

### **Extended learning networks**

- On-line learning enhanced and enriched by professional knowledge and experience
- All teachers have access to the wider profession of educators
- Enhanced opportunities at cyclical intervals (new teacher, mid career, experienced)
- Flexible opportunities beyond the classroom.

### **Teachers' professional time**

- Recognise the need for time and flexibility to fulfil the full range of professional responsibilities – develop a minimum entitlement
- Explore, evaluate and publicise different models of school management and organisation
- New approach to the school day, week and year.

### **Continuing Professional Development**

Proposals:

- government is asked to make a clear commitment over the next five years to provide an entitlement to professional development for every teacher including part time and supply teachers
- a new concept of development based on a range of opportunities to meet individual and school needs
- focus on sharing effective practice to support teaching and learning.

Progress to date:

- professional development following induction
- focus on teachers beginning their careers
- sabbaticals.

### **Professional learning framework**

- Develop a shared understanding of the parameters and purposes of CPD
- Raise teachers' expectations
- How teachers contribute to collective knowledge
- Framework for school leaders to make time and support available
- Influence national policy and funding.

## Professional learning framework – areas of experience

Individual action:

- Self/peer/school review e.g.
  - observation
  - pupil data
- Engaging with research e.g.
  - evidence of effective practice
  - access to educational research
  - designing and conducting research.

Networks within the school:

- Collegial learning at the heart of professional practice e.g.
  - lesson study
  - team teaching
  - peer coaching
  - mentoring
  - whole-school collaborative enquiry
- Developing own practice – leading changes e.g.
  - implementing new strategies
  - devising curriculum approaches
  - new ways of working with other adults
  - constructing own strategic learning plan
- Assisting the development of colleagues' practice e.g.
  - demonstration lessons
  - tutoring and supporting
  - leading INSET
  - supporting identification of needs
- Informing professional understanding beyond the school e.g.
  - set up/maintain learning networks
  - use technology to broaden networks
  - develop and evaluate initiatives
  - take part in professional dialogue on national policy
  - run seminars/courses at LEA/HEI level.

# INVESTORS IN PEOPLE

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Investors in People (IIP) is a Department of Education and Employment (DfEE) initiative administrated by the Training and Enterprise Council through regional centres. The scheme was designed by the Confederation of British Industry (CBI) in consultation with leading professional and business organisations, trade unions and the Institute of Personnel Management (IPM). It was developed by the National Training Task Force (NTTF) and launched on a national scale in 1990. The CBI and NTTF considered that the British economy would better meet the changing demands of the global economy if organisations and institutions were to put more emphasis on staff involvement and development.

The IIP standard aims to help organisations and institutions of all kinds to improve their performance and effectiveness by realising the full potential of their workforces. The fastest growth sector for the take-up of IIP is currently that of schools. It is recognised that the IIP standard contributes the best business practice, combining policy and practice to inform staff development.

The four principles upon which IIP is based are:

- 1 commitment from the top levels of the organisation to develop all employees to meet its strategic objectives;
- 2 planning and reviewing the training and development needs of employees;
- 3 action to train and develop individuals on recruitment and throughout their employment;
- 4 evaluation to assess the achievement resulting from investment in training and development to improve future effectiveness.

The continuous cycle of improvement emphasises schools as learning institutions and provides a unity of purpose and a clarity of vision. The IIP principles involve all employees in reviewing practice and setting targets. The IIP standard seeks to improve performance through people, while setting a level of 'good practice'.

## **IIP IN SCHOOLS**

The IIP process:

- gives schools the opportunity and focus for involving all staff in school development planning;
- indicates to all staff that they are valuable members of the institution
- allows schools to identify gaps in internal communication patterns and to take steps to improve them
- helps to pass on the professional development model of staff appraisal and to demonstrate to staff that this model best meets individual needs
- allows school staff to benefit from being brought into contact with other organisations/institutions working towards the same standard.

To achieve the standard, there are a number of procedures and processes that schools need to have set in place:

- a central vision, expressed through a set of aims or mission statements, which must be shared with and subscribed to by all staff
- clear internal communication systems
- a formal system of annually reviewing staff development and training needs
- a policy for meeting identified training and development, improving the effectiveness of the school.

IIP procedures are rooted in good practice, encouraging schools to become learning organisations. School management teams need to focus on staff development for all staff.

## **THE IIP PROCESS**

IIP begins with the preparation of an audit of the school's current position in relation to the four key areas of the standard, and the creation of an action plan, including issues that will need to be addressed at the implementation stage (Brown and Taylor, 1996).

### **Checklist**

#### **Initial audit – key areas**

- Management methods and processes: Evidence is gathered from staff and governors through a series of interviews, providing values material for the IIP portfolio
- A staff questionnaire: Evidence is gathered based on the four key areas of the standard. All staff are requested to complete the questionnaire from all areas of the school community
- Action plan: A commentary is produced on the evidence gathered, recommending action points, practical steps and timescales to take each of the key areas of IIP forward.

## **BENEFITS**

The IIP standard assists schools in transforming themselves further, by looking for ways of improving their operating procedures and processes. It aims to get the best out of staff by motivating them to feel committed and valued, by giving them an understanding of what their contribution can be to the school as a whole and the skills to fulfil their potential.

Brown and Taylor (1996) list additional benefits:

- *funding is available to subsidise work in school*
- *the IIP standard demands that consultants help leadership in the school examine the reality of life within the organisation they lead*
- *discipline and a structure is helpful to school staff and to making clear the consultants' objectives and success criteria*
- *external assessment, based on systematic and consistent principles, permits schools to partake successfully in the process.*

IIP can be implemented effectively by focusing on minimal concrete goals. Continuous improvement is a concept that permeates the school, where change and improvement are constant. For success in IIP terms, senior and middle management need to demonstrate support for all colleagues, have good communication and allow growth.

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# Executive summary

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This section has presented an introduction to professional development initiatives directed by external agencies. Key points to consider are:

- National standards for teachers
- General Teaching Council
- Investors in People
- Government stakeholders.

A key question for schools is to what extent staff are working with external agencies.

The next section considers research and accreditation issues.
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## Section 8

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# ACCREDITATION AND RESEARCH

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When staff development for teachers and support staff is being planned, professional qualifications and research opportunities should be considered. All professionals have a qualification from an award-bearing institution. In addition, professionals engaged in the education of young people have the opportunity and potential to research their practice.

There has been much documented in the promotion of lifelong learning. The most recent contribution comes from the National Advisory Group for Continuing Education and Lifelong Learning (Fryer, 1997). Evidence from the report supported by both the Kennedy Report on Further Education (Further Education Funding Council, 1997) and the Dearing Review of Higher Education (National Committee of Inquiry into Higher Education, 1997) indicates that the most senior professionals in the UK are those with higher degrees.

The difficulty for teachers and support staff is how to relate their experience to awards and research opportunities. While it is a mistake to equate either learning or achievement with qualifications alone, teachers and support staff need to reflect on their own learning in the classroom. Time needs to be invested in providing opportunities for staff to reflect on their practice and to utilise such experiences in the context of awards and research opportunities.

As the government report on lifelong learning (Fryer, 1997) states, an unnecessary barrier to awards and research is created by the number of qualifications and the esoteric language of research. A learning culture should be accessible to all members of the school community. This would enable staff to develop knowledge, understanding, skills and abilities related to teaching and learning. A learning culture should not be confined to particular places, methods or forms of learning. Schools are judged on their ability to stimulate learning, and this cannot be overstated. They should see themselves as an important part of the wider network of partners in education. Mechanisms should be identified to support staff in schools to develop skills to promote lifelong learning.

Higher education institutions (HEIs) have a particular contribution to extending knowledge and skills through excellence in teaching, research and dissemination. Commitment to strengthening the quality of the teaching profession and to continuing professional development is essential. Award-bearing courses have many advantages; they:

- provide a sharp, intensive stimulus to learning
- provide skill or knowledge not available on the job
- can be designed for intensive, rapid learning
- provide the professional spin-off of learning with, and from, a different group of people
- are an alternative to learning on the job.

This section describes the opportunities available to staff in schools in terms of:

- award-bearing courses
- practitioner research.

The number and range of award-bearing courses in education is confusing. Higher education institutions are in competition to gain the greatest number of students and to have a research record that is rated highly by the academic community.

As McCall and Lawlor (2002b, p. 151) state:

*The majority of readers will know that in relation to continuing professional development, the word 'accreditation' has two meanings. First, it is the process of giving formal or official recognition to an individual, group or institution when they have met certain designated standards. The recognition may be for successfully completing an academic course, increasing individual skills proficiency, meeting role-related expectations, or for achieving across the whole of the institution a quality of performance that equals a standard laid down in specified criteria. Second, the term can refer to 'approval' or 'licence' to carry on offering a specific type of provision, to continue to be a 'training-base' for some award-bearing route, or to continue to carry out some kind of self-review or self-evaluation.*

Table 8.1 illustrates higher education awards in relation to the professional development framework, further and higher education awards and the National Vocational Qualifications.

National standards	Level	Award-bearing courses	NVQ
NPQSH	H5	Doctorate	Level 5
HEADLAMP	H4	M.Phil.	Level 5
NPQH	H4	Master's degree	Level 5
NPQSL/NPQSENCO	H4	Postgraduate/diploma	Level 4/5
AST	H3	Postgraduate/higher honours	Level 4
NQT	H3	Honours degree	Level 4
NQT	H2	Bachelor's degree	Level 4
	H1	Certificate	Level 3/4
		City and Guilds	Level 2

**Table 8.1 The professional development framework/awards**

As shown, there is significant overlap between the awards. In this jungle of opportunities it is difficult to decide which is the most appropriate course to follow. A possible way forward is to look for multiple outcomes, i.e. using the same or similar material and experiences for more than one award. As an example, the Teacher Training Agency has agreed to allow NPQH candidates to submit master's dissertations and assignments, where applicable, in part fulfilment of the award. This is excellent use of the teachers' expertise, leading to headteachers with academic and professional qualifications.

The following chapters introduce a range of award-bearing courses, providing the reader with an understanding of requirements for each level.

# QUALIFIED TEACHER STATUS

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A range of opportunities exist leading to the award of Qualified Teacher Status (QTS), e.g. B.Ed., BA, PGCE, Graduate Teacher Programme, Registered Teacher Programme, Graduate Teacher Programme, School-Centred Initial Teacher Training, Accredited Training Scheme and Overseas Trained Teacher Scheme. Each course can be followed full-time or part-time. Students can train for primary courses according to age range (3–11 and 5–11), or secondary (11–18).

The standards apply to all trainees seeking QTS. Successful completion by a trainee of a course or programme of initial teacher training (ITT), including employment-based provision, requires them to achieve all the QTS standards, and courses must involve the assessment of all trainees against all the standards specified for the award.

Qualified Teacher Status is a requirement for all those who teach in a maintained school and, as such, represents the first national professional qualification in the professional framework of standards and qualifications for teachers.

Qualified Teacher Status is awarded after satisfactory completion of a course of ITT, either concurrently with, or after, the award of a first degree of a UK university or a higher education institution with degree-awarding powers, or a qualification recognised to be equivalent to a UK degree.

Within the national standards framework for teachers, the Teacher Training Agency (TTA) has produced regulations for all newly qualified teachers, the main focus of which is knowledge of, and ability to teach, the National Curriculum. In addition, newly qualified teachers need to have achieved professional competence in planning, teaching and class management skills.

School management teams and mentors should be aware that newly qualified teachers will need to demonstrate the ability to plan their teaching to achieve progression in pupils' learning through:

- identifying clear teaching objectives and content
- setting tasks that challenge and interest pupils
- setting appropriate and demanding expectations
- setting clear targets for pupils' learning, building on prior attainment
- identifying pupils' needs
- making effective use of assessment information
- planning opportunities to contribute to pupils' personal, spiritual, moral, social and cultural development.

In the context of teaching and class management, the DfES/TTA also requires NQTs to:

- ensure effective teaching of whole classes, groups and individuals
- monitor and intervene when teaching to ensure sound learning and discipline
- establish a safe environment
- use teaching methods that sustain the momentum of pupils' work and engage all pupils
- be familiar with the code of practice on special educational needs
- ensure that pupils acquire and consolidate knowledge, skills and understanding in the subject.

## **INITIAL TEACHER EDUCATION – PARTNERSHIP**

The professional development of student teachers is now firmly rooted in partnerships between local schools and higher education institutions (HEIs). Initial teacher education (ITE) programmes are now set within a framework of shared practice that is dependent upon mutual respect and understanding. A more detailed discussion of these issues may be found in *Managing Partnership in Teacher Training and Development* (Bines and Welton, 1995).

Critically, school and HEI partnerships need to consider the management of discipline as a key factor in training programmes and the assessment of students. It is also fundamental that teacher training institutions should focus on organisational issues when they prepare student teachers for professional practice. It is beneficial for teacher educators to work in schools in order to experience the problems encountered by students and newly qualified teachers.

Any involvement in training teachers should be preceded by whole-school consultation, taking into account the views of individual teachers, departments, parents, governors and pupils. The school's priorities, as identified in the school development plan (SDP), should be considered at an early stage, and if ITE is to become a focus within the school, it should be integrated with the professional development programme identified in the plan.

It is advisable to carry out a 'cost-benefit' analysis of what involvement in ITE will mean.

### **Checklist**

#### **What are the benefits to schools of ITE?**

The benefits that can accrue from appropriately resourced involvement in ITE include:

- a raising of the school's collective self-image, through involvement with higher education
- an enhancement of the reputation of the school, leading to possible improvements in the recruitment and retention of staff
- access to the expertise and facilities of higher education
- greater individual and collective learning amongst teachers, leading to heightened critical awareness of their practice
- career development opportunities for teachers involved in becoming professional tutors, or 'mentors' to student teachers.

The cost to schools include those of time, resources, teacher expertise and the effect on pupils' learning of an increased emphasis upon training student teachers.

**Checklist****What are the responsibilities of the school?**

The school is responsible for:

- developing consistent and worthwhile programmes for students of different ages and stages in their learning and aptitudes
- formally assessing and counselling students, including those whose placement is proving unsuccessful
- providing release time for mentors, for their own training needs to be met and to allow them to support students
- in secondary schools, particularly, making changes to the school timetable.

School responsibilities should be considered alongside the more significant issues of funding, potential increases in workload and the implications for pupils' learning. The costs of providing specific support such as adequate library and IT facilities for students should also be assessed.

**MENTORS IN INITIAL TEACHER EDUCATION**

If a school is to be involved in ITE, mentors or teacher tutors will need to be appointed from within the staff. The mentor's role is dependent on the definition of a school's role in training and on its ability to balance that role effectively with the central one of providing high-quality education for pupils. The appointment of a mentor should be subject to fair and open selection procedures. A mentor or teacher tutor should be an experienced teacher with a sound knowledge of educational and curriculum developments.

**Checklist****What will ITE mentors need to offer?**

They will need:

- to provide an example themselves of 'good practice'
- the ability to counsel, support and where necessary direct student teachers, facilitate their development and evaluate their practice
- the ability to assess formally the development of the students against a statutory list of professional competencies
- the maturity and confidence to respond assertively to questions and challenges from students
- a knowledge of the school, all staff, departments and pupils in order to introduce the students to the routines and procedures of the institution
- a level of expertise in the specific curriculum areas and/or subjects studied by the students and their application in the classroom
- a level of pedagogical and professional awareness with which to interpret and facilitate the development of the students in these areas.

### **Checklist**

#### **What should headteachers provide for mentors?**

Headteachers will need to ensure that mentors receive:

- appropriate training
- in most cases, a reduction in teaching load without increasing the load of colleagues
- directed time to fulfil their ITE responsibilities
- salary recognition where appropriate
- ongoing support, advice and evaluation.

The number of students per mentor will depend on:

- the other duties of the teacher who is acting as mentor;
- the previous experience of the students;
- the responsibilities given to the mentor within the particular partnership agreement;
- the training and experience of the mentor;
- whether or not the students involved are from one partnership scheme or from several;
- the amount of directed time allocated to the mentoring of students.

Participation in ITE can enhance schools and contribute towards professional development and overall morale. The purpose of ITE, however, is to provide an effective, supportive and stimulating start to a teacher's career.

Where the criteria outlined above cannot be met, headteachers should not recommend involvement in teacher training. All of these elements are best undertaken in a spirit of co-operation and mutual support. In that way, all those involved in decision making and action can feel a sense of ownership and can understand the direction in which the organisation is heading.



# MASTERS AND DOCTORATES IN EDUCATION

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Traditionally teachers have continued their professional development through award-bearing courses. Career advancement has been associated with further scholastic activity in a higher education institution (HEI). Phillips and Pugh (1988, p. 16) summarise the meaning of the degree structure of a UK university:

- *A bachelor's degree shows that the recipient has obtained a general education*
- *A master's degree is a licence to practise*
- *A doctor's degree is a licence to teach ... in a university.*

The majority of HEIs in England and Wales providing teacher education within schools of education offer master's courses for practising teachers. Award-bearing master's courses in education develop students' knowledge and understanding of education theory and research, and thus inform practice. Some courses may focus on education management while others focus on specialist subject areas. Teachers can study at a university or opt for distance-learning packages.

Having successfully completed a master's course, teachers can continue with an academic education to doctorate level. There are currently two distinct approaches to doctorates for educationalists: the traditional Ph.D. (Doctor of Philosophy) and the Ed.D. (Doctor of Education). The former requires independent study towards the completion of a thesis that makes an original contribution to the knowledge of the field studied. The Ed.D. is a modularised taught course offered by approximately 18 universities to senior education professionals.

Teachers are busy professionals. Working full-time and studying part-time can be very difficult. If you intend to pursue such a course, you will need to have full support from family and friends. You may also require financial support from your institution and/or LEA or school through the Standards Fund (see Section 9). Educational study and research should relate to practice and the needs of the school as identified in the SDP. Courses offer the student the opportunity to be challenged, stretched and excited in a collegial environment.

Table 8.2 shows the context within which degree courses are placed.

Focus	Type of award	Emphasis	Awarding body	Relevance
Individual	Certificates, diplomas, degrees and higher degrees	Academic autonomy, academic rigour (eclectic knowledge, little 'official line', reasoned rather than anecdotal expression)	University partnership (e.g. university and LEA)	Varies – but increasingly; the components of many awards centre on professional issues and applied professional knowledge and understanding; open to less central manipulation than some other types of accreditation
Proficiency	Certificates, competency assessment (e.g. RSA CLAIT)	Increased effectiveness in applying a range of skills to professional tasks	National organisations	High – often topical and targeted at updating professional capability or providing opportunities to acquire new professional competencies
Role-related	Recognised professional qualification (e.g. NPQH; SENCO training)	Attributes, knowledge, understanding and skills thought to be necessary to work competently and successfully in a designated professional role	National agencies; awarding partnerships	Focused on classroom, school and wider professional issues – but initially driven by political imperatives rather than any researched model of learning and professional development
System	Accreditation to an organisation for showing evidence of meeting curriculum or professional development standards	Curriculum or staff development	DfES (school/ curriculum awards); Investors in People (staff development)	Helpful as part of strategic plan for school improvement/ school development

**Table 8.2 Educational qualifications**

Source: McCall and Lawlor (2002b, p. 151)

As Field (2002, p. 105) explains:

*Accreditation is more than the award of 'points' which count towards a Master's qualification. In order to be awarded credit points, participants must demonstrate the achievement of Master's level assessment criteria. To meet the criteria, participants have to engage actively with what they have learnt. This means:*

- *showing that the work is focused and can be related to both theory and contextual circumstances*
- *presenting in a clear manner, drawing on theory and research findings to inform and underpin planning and practice*
- *drawing on relevant literature to show an understanding of opportunities, constraints, trends and patterns both in a theoretical and practical sense*
- *selecting appropriate and manageable methods to achieve the learning outcomes. This includes the examination of a range of approaches, and the building of a plan, implementation procedures and evaluation processes, which are justifiable and suited to practical circumstances*
- *presenting valid and reliable evidence and data to support arguments and hypotheses developed throughout the work*
- *demonstrating a sense of control through an understanding of theoretical and practical issues. Reflection and analysis in a rigorous manner enables the participant to 'make sense' of his/her predicament*
- *presenting the work in a coherent and professional manner which conforms to academic conventions, and which supports the purpose of the work.*

Before embarking on a course, try to gather as much information as you can. Visit the universities and talk to potential course leaders and supervisors. It would also be useful to read dissertations and theses in your area of interest to determine what will be required for the award. If you were about to change job, move house or expect any major family events in the near future, this would not be the right time to start a course.

Academic study should relate to practice; be clear as to why you want to study and what you would do with the qualification. Think, 'What next?'

# RESEARCH: BEST PRACTICE RESEARCH SCHOLARSHIPS

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Teachers are active participants in school life at every level. Teachers are in a position to influence and engage in educational research. Hargreaves (1996) believes that teaching is not a research-based profession. Yet education researchers receive £35 million per annum from the Higher Education Funding Council for England, the Economic and Social Research Council (ESRC), the Department for Education and Skills, the National Foundation for Educational Research and the Teacher Training Agency (TTA).

There are several initiatives inviting practitioners to lead and participate in research. At the end of this section, workshops provide the reader with an introduction to the research process.

### RESEARCH OPPORTUNITIES

Teachers should understand that the purpose of research is to inform and improve practice:

- all pupils are enabled to learn
- all teachers are enabled to teach.

Teachers should make the most of the opportunities to work with colleagues. Discussions will help to develop ideas. You could decide to work with a research partner for:

- preparation
- implementation
- dissemination.

Moving from the classroom to a research environment can be challenging. As a researcher you will have access to:

- other researchers
- a university library – with full support from library staff
- information technology rooms – with support from experts
- university staff.

In seeking the truth, researchers need to be open and honest with their colleagues and the sample involved in the research process. There is little to be gained from researching an issue that is so contentious that the final report will not be read by those involved.

In addition, you may wish to extend your experience and join other researchers by contributing to:

- research journals
- research conferences
- curriculum-related conferences
- management associations.

## **RESEARCH LANGUAGE**

All professions have their own language. Education researchers have to adopt the language and mechanisms associated with their practice. This is not to the exclusion of others.

As a researcher you need to retain your own style of working within the framework of education research. It is inappropriate to adopt a style which you feel uncomfortable with: try to develop your style as you work.

## **RESEARCH ETHICS**

Children are often used in research without permission from parents and teachers. Since they are a 'captive sample', access is straightforward and a response is guaranteed. However, good practice will involve consulting those responsible for pupils before involving them in your research.

When designing your research questions, try to be as open as possible. If appropriate, involve your colleagues in the development of your research. Think about who will benefit from your research in the short/medium/long term.

## **THE DFES MODEL FOR BEST PRACTICE RESEARCH SCHOLARSHIPS**

As a consequence of mounting criticism of the role and purpose of educational research (e.g. Hargreaves, 1996), there has been renewed interest in funding teachers to follow their own research questions. In 1996, the Teacher Training Agency (TTA) launched the Teacher Research Grant pilot scheme. Within a few years, the funding of such projects moved to the DfEE. In April 2000, Best Practice Research Scholarships (BPRS) were launched with a similar philosophy to that of the TTA. Such scholarships have continued to be funded by the DfES. In considering the development of teacher as researcher, guidance is given for any bid for BPRS to be eligible for assessment (DfEE, 2000a). Each project must set out clearly:

- The purpose of the investigation, its intended outcomes and its link to raising standards of teaching and learning in areas that are school, local and national priorities
- How the research will be undertaken, including methodology and data collection techniques.

For further information go to: [www.dfes.gov.uk/bprs](http://www.dfes.gov.uk/bprs)

## GENERAL TEACHING COUNCIL AND HIGHER EDUCATION

The HEI sector represents a major resource for teaching and learning in schools. The General Teaching Council (GTC) is working with institutions in the HEI sector to explore how to make the most of their strategic contributions, including:

- making research-based evidence about teaching and learning, teacher development and school improvement more accessible to policy makers and practitioners – this will support innovations with the best available knowledge base, which includes conceptual and theoretical understanding as well as empirical evidence
- providing extended support for developing capacity in schools – the relevant expertise ranges from contributing to evaluation methods and instruments, to supporting pedagogical experimentation and the management of change; the ESRC Teaching and Learning Research Programme is seen as a crucial strategic partner.

The following illustrates the GTC's level of engagement in teacher research initiatives:

### General Teaching Council – Research of the Month

Saunders (2002) reports that:

*Research is a key strategic development area for the GTC. The council is committed to becoming an evidence-based organisation in terms of its policy formation and advice to Government. Research of the Month was evaluated after a pilot phase and is now an established feature of the GTC's website. Work (Research of the Month) is carried out by a team from CUREE – Centre for Using Research and Evidence in Education, working in close conjunction with the GTC to select research that:*

- *Illustrates the complex tasks involved in teaching;*
- *Enables teachers to see clearly whether there are links with their own pupils and practice, and what these are;*
- *Provides detailed information about the particular teaching and learning processes in classrooms with which teachers can identify;*
- *[Is] written and presented as accessibly as possible, in case teachers want to obtain and read the original text.*

Further information is available on the website: [www.gtce.org.uk/researchofthemoth](http://www.gtce.org.uk/researchofthemoth)

### The National Teacher Research Panel

The National Teacher Research Panel was set up by the TTA in 1999 and in that short time has accomplished a range of activities concerned with:

- promoting teaching as an evidence-informed activity
- emphasising the profession's perspective in educational research.

The panel is now being hosted by a partnership between the DfES, GTC, National College for School Leadership (NCSL) and TTA. The panel's work will help the GTC to move forward on its commitment to promoting teaching as an evidence-informed profession. The GTC is publicly promoting the role and work of the panel at every opportunity, and within the GTC itself.

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# Executive summary

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This section has presented details of award-bearing courses and research opportunities for teachers. Key points to consider are:

- How to relate experience to awards and research opportunities
- A learning culture should be accessible to all members of the school community
- There is significant overlap between awards (see Table 8.1)
- Schools have much to contribute to initial teacher education
- Master's and doctoral courses are available to teachers
- Research grants are awarded to teachers
- Research is possible in schools.

Guidance on planning and resourcing professional development is given in the next section.
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# Workshop materials

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The following workshops provide you with an introduction to educational research, and should be read as if you were about to embark on your first research project.

## Workshop 8.1

### THE RESEARCH PROCESS

#### Key points

- Define the research question. What do you want to find out? What is it that the researcher is interested in? This will involve producing a statement about the nature of the research, to include information about the people and the geography
- Identify hypotheses or objectives. What will you discover as a result of the research?
- What is the population being researched? This is vital
- From whom will the information be obtained and why?
- What sampling method will be used?
- What will be the best method of obtaining the required information?
- What will be the design of research instruments/tools?
- Prepare to implement fieldwork: introduction to research and access to field
- Carry out fieldwork
- Process the data. Use a computer or cards; code
- Conduct analysis
- Dissemination: write in a logical form.

## Workshop 8.2

### TIME MANAGEMENT

Working full-time and researching part-time is challenging. Anticipate the peaks and troughs of your professional, personal and student lives: e.g. try to avoid writing an assignment and 200 reports in the same week. There will be times when you need to prioritise.

The gathering of evidence is a time-consuming element in the research process. A few points to consider are:

- What is the relevance of research?
- What is the relevance of evidence?
- Is there a more suitable example elsewhere, i.e. in another school?
- Keep a record of all sources – dates, titles/authors and page numbers
- The number of sources used is only appropriate where relevant; quality is important
- Acknowledge sources as appropriate
- Try to use a number of sources, as available.

Develop your own style, appropriate to your work. Discuss and analyse ideas, be confident, and develop your own voice.

## Workshop 8.3

### RESEARCH CHECKLIST

#### Key points

- Why was the research intended?
- What was the research intended?
- How was the research done?
- Research design – questionnaire/interviews/surveys
- Survey population – sampling
- Instrumental design analysis
- The process
- Presentation of results
- Analysis of result
- Research methodology – critical analysis
- Recommendations
- Conclusions

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## Section 9

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# PLANNING AND RESOURCES

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This manual focuses on planning professional development in schools. Planning and resourcing professional development is a demanding responsibility for senior and middle management. Planning is central to all activities in school. Resources are required to enable policies and plans to be realised. As McCall and Lawlor (2002b, pp. 153–4) state:

*With something as complex and potentially constructive as CPD, there is, therefore, no neat structural package that can be taken off the shelf and made to serve all needs, situations and circumstances. A strong, yet flexible structure is needed, and this may well have to arise at the school, local authority and national levels from a focused 'listening up', 'feedback down', then 'together towards next actions' sequence.*

*The more complex a professional activity becomes, the more policy interventions have to take into account the views of practitioners and leave space for local adaptations. This assumption is based on the understanding that in complex modern societies many local practical problems cannot be solved for the institutions by central regulations. Instead, the problem-solving capacity of these institutions and of the persons working in them, has to be improved ... Innovations in complex situations cannot be cloned ... The principle implies that any substantial innovation must be 'acquired' by teachers in a very personal sense. This means that they must be able to transform it.*

Source: OECD, 1996; quoted by Graham (1999, p. 97)

This section will provide guidance on planning and resourcing for effective and successful professional development.

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## Chapter 35

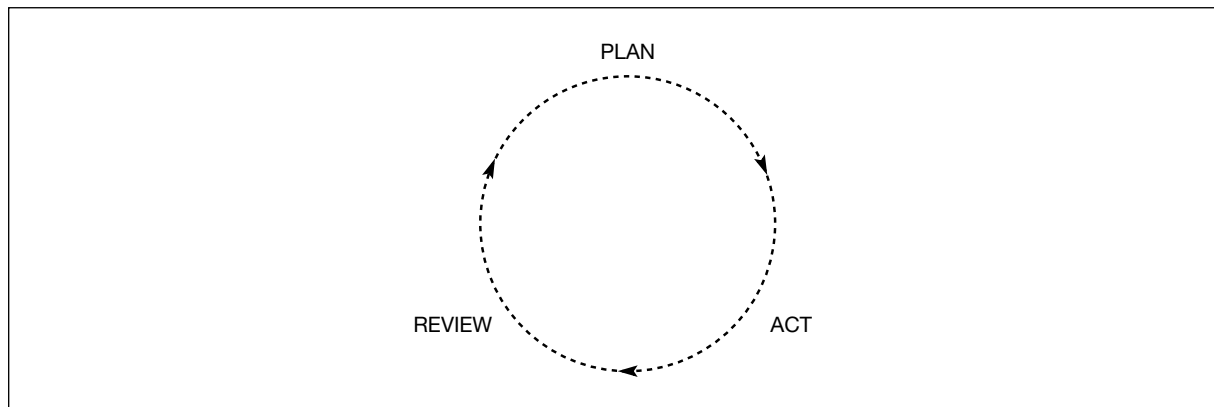
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# PLANNING

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Planning is critical to the effective management and implementation of professional development programmes. Managers and staff development co-ordinators will need to understand the place of planning in effective management.

Effective management is a three-part process: plan, act, review (see Fig. 9.1).



**Fig. 9.1 The management cycle**

*Source:* West-Burnham (1994, p. 157)

### PLANNING IN PRACTICE

Planning consists of the following three elements:

- 1 *Objectives*: goals that are to be achieved in sufficiently detailed and precise terms to enable others to identify whether they have been achieved
- 2 *Actions*: specification of the activities required to meet the objectives
- 3 *Resource*: identification of what and who will be required to achieve the objectives and an indication of the time scale.

Planning may involve 'going around in circles' as you consider the various combinations of objectives, actions and resources that will provide you with your way forward.

However, this is a necessary process to ensure that all elements are considered. Table 9.1 shows the sequence.

<b>Objectives</b>	<b>Stage 1</b>	<i>Define the objectives</i>	What are you aiming to achieve?
	<b>Stage 2</b>	<i>Generate and evaluate objectives/actions</i>	What are the courses of action available? Which one will best achieve your objectives?
<b>Actions</b>	<b>Stage 3</b>	<i>Identify the actions</i>	What is required to implement your objectives?
	<b>Stage 4</b>	<i>Sequence the actions</i>	What is the best order?
<b>Resources</b>	<b>Stage 5</b>	<i>Identify the resources</i>	What resources are required?
<b>Review</b>	<b>Stage 6</b>	<i>Review the plan</i>	Will it work? If not, return to stage 2 or 3.
<b>Preparation</b>	<b>Stage 7</b>	<i>Prepare plans and schedules</i>	Who will do what and when?
<b>Audit</b>	<b>Stage 8</b>	<i>Monitor and evaluate</i>	Re-plan if necessary.

**Table 9.1 Planning stages**

The 'key features' of this model are (West-Burnham, 1994, pp. 81–2):

- 1 *Everything is driven by the values and mission of the organisation and these have been developed and are owned by all staff*
- 2 *Strategic planning has a three- to five-year time frame, i.e. beyond the contingent and reactive, and is primarily the responsibility of senior staff and community representatives*
- 3 *Once agreed, strategy has to be translated into a policy, which serves as the basis of decision-making, notably for annual budgets and the deployment and development of staff*
- 4 *Medium-term planning is primarily concerned with translating policies into action, most significantly through annual development plans, objective budgeting and planning for the deployment and development of staff*
- 5 *This, in turn, facilitates the negotiation of short-term targets so that each individual is working to optimum effect*
- 6 *Because the vision has been translated into individual activities, evaluation is based upon the aggregation of specific outcomes, allowing the matching of intention and actual achievement.*

## **PARTICIPATION AND DECISION MAKING**

Planning involves decision making: individually and collaboratively. If planning is to be effective, teachers will need to understand how to prioritise and how to make decisions. Warwick (1983) states that:

*Decision-making is so much part of daily life in any school that it can easily be taken for granted. Only when things go wrong, when bad decisions have been taken or the consultation process has broken down, do most teachers become aware of it.*



Decision making is intimately bound up with every individual manager's personal values, personal goals and management style. In order to make quality decisions, Hall and Oldroyd (1990a) suggest that managers should have:

- clear personal values
- clear personal goals
- problem-solving skills
- high creativity
- high influence.

A manager must develop the skills and abilities required to determine when to act on their own and when to collaborate with others. Adopting a structured approach to decision making will aid the process.

### **Checklist**

#### **What is a structured approach to decision making?**

- Clear analysis of the learning purpose:
  - context
  - resources
  - outcomes
- Clear specification of the criteria for the plan as determined by:
  - school development plan
  - LEA
  - government initiatives
- Systematic research
- Testing decisions against likely outcomes for individuals and schools.

Deciding when to consult your team will affect:

- the quality of the decision
- the staff's acceptance of the decision
- the amount of time involved in the decision-making process.

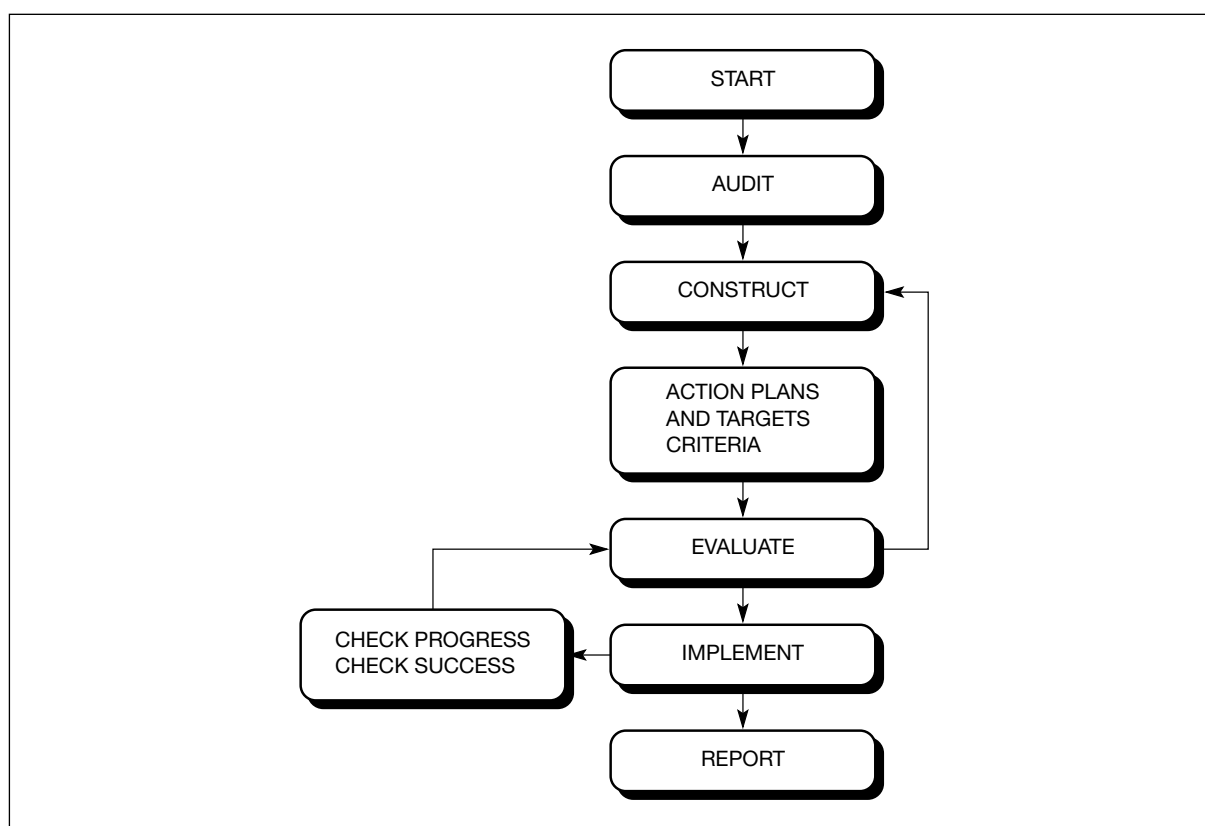
Schools that are improving performance have a collaborative team approach at senior management level, which is replicated among the teaching staff. In schools that demonstrate improvement, staff development is given a high profile and is viewed as an important means of introducing innovation and sustaining curriculum development. While the school improvement literature has placed an emphasis upon teachers working together as members of a team (Fullan and Hargreaves, 1992), the practical realisation of this often proves more difficult to find.

In schools that demonstrate improvement, staff development is not conceptualised as being concerned with meeting individual needs. Instead, it is viewed as having a whole-school focus and collaborative purpose. In such schools, staff development is realised through an overall framework and commitment to school improvement.

In the 'improving' schools individual teachers are encouraged to be learners themselves. Staff are encouraged to collaborate by learning with and from each other.

## THE PLANNING PROCESS

Figure 9.2 illustrates the planning process in practice.



**Fig. 9.2 The planning process**

Co-ordinators and senior managers need to consider:

- policy and aims – starting-point
- audit of existing practice
- constructing an operational plan
- specific action plans against targets
- evaluation process
- checking progress – celebrating success
- implementation of plan
- review and evaluation.

A staff development co-ordinator needs to know and understand strategic and operational planning.

### **Strategic and operational planning definitions**

#### **Strategic planning**

A strategy is a broad statement that relates the overall approach and direction towards the achievement of a mission. Developing and maintaining a strategy involves establishing a framework within which an operational plan can take place. Strategic planning is long-term planning, which takes into consideration the strengths and weaknesses of the organisation and external factors such as government directives.

#### **Operational planning**

Operational planning is about tasks and targets and relates directly to the role of a school's teachers and managers: who does what, when and how. It is concerned with making things happen in a short time scale, e.g. how to run a department or team over a period of up to 12 months. Operational planning is detailed. It aims to achieve a particular set of objectives within a given time. A school/department development plan is an operational plan. The planning, implementation and evaluation of professional development programmes at school level should take account of the school's strategic plan, priorities and available resources.

## **STRATEGIC PLANNING**

In order for continuing professional development to be effective, it has to relate theory to practice and provide a framework for action that will improve and develop the management of staff in the school. The school as a whole has a responsibility to develop policies and provide resources for staff development.

Figure 9.3 illustrates the process of elaborating a professional development strategy.

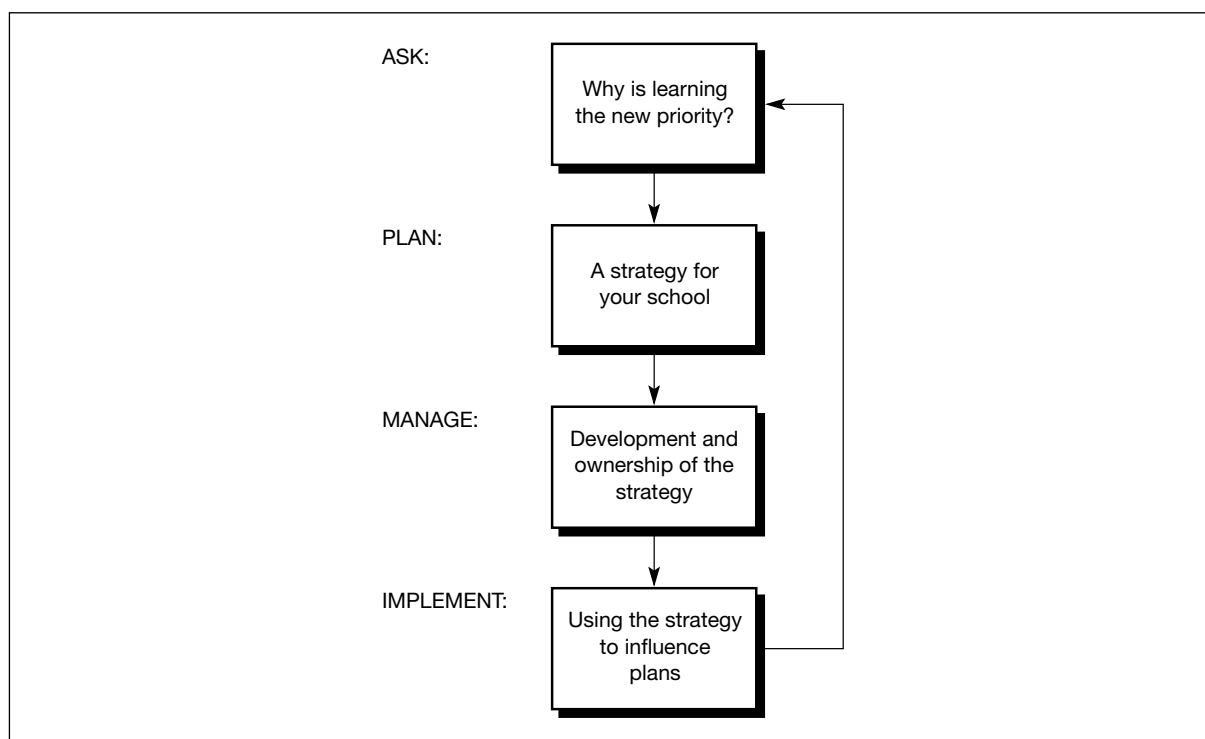
The planning, implementation and evaluation of professional development programmes at school level should take account of the school's strategic plan, priorities and available resources.

## **OPERATIONAL PLANNING**

To be implemented successfully, operational plans for staff development programmes must be headed by the senior management team. Operational plans should:

- set clear and specific objectives for each development activity
- assign responsibility for those involved.

When planning, implementing and reviewing continuing professional programmes, the focus should be on the relevance of the programme to developing pupils' self-esteem and self-confidence.



**Fig. 9.3 Professional development planning strategy**

### Checklist

#### Operational plan

Critically, INSET operational plans should reflect, inform and review policy; the process should include:

- an evaluation brief that will inform policy
- a statement of aims
- a list of performance indicators relating to targets or outcomes that are specific, measurable, attainable, relevant and time-limited, informative, evaluative and stimulating
- detailed questions related to the above
- information arising from the evaluation process that is related to practice
- outcomes that are accessible to all staff
- conclusions that will inform policy.

## RECORDING

Recording the planning process is critical to its success. Table 9.2 is an example of good practice.

Target	Action	When	By whom	Resources	Monitoring
Organise whole-school INSET	Planning meeting	Term 1	Senior management and staff	LEA	Completed by November
Book guest speaker		Term 1	Headteacher	LEA/ Standards Fund	Completed by October
Set agenda	Circulate to staff for comment	Term 1	Deputy headteacher assessment	School	Completed by November
Compile profiling	INSET: two days	Term 2	Whole staff	LEA	Completed by March
Trail scheme	Years 9–11	Term 3	Selected subject areas	School	Completed by June
Evaluate	Collate information	Term 3	Selected subject areas	School	Completed by June

**Table 9.2 Planning sheet: assessment profiling**

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## Chapter 36

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# RESOURCES

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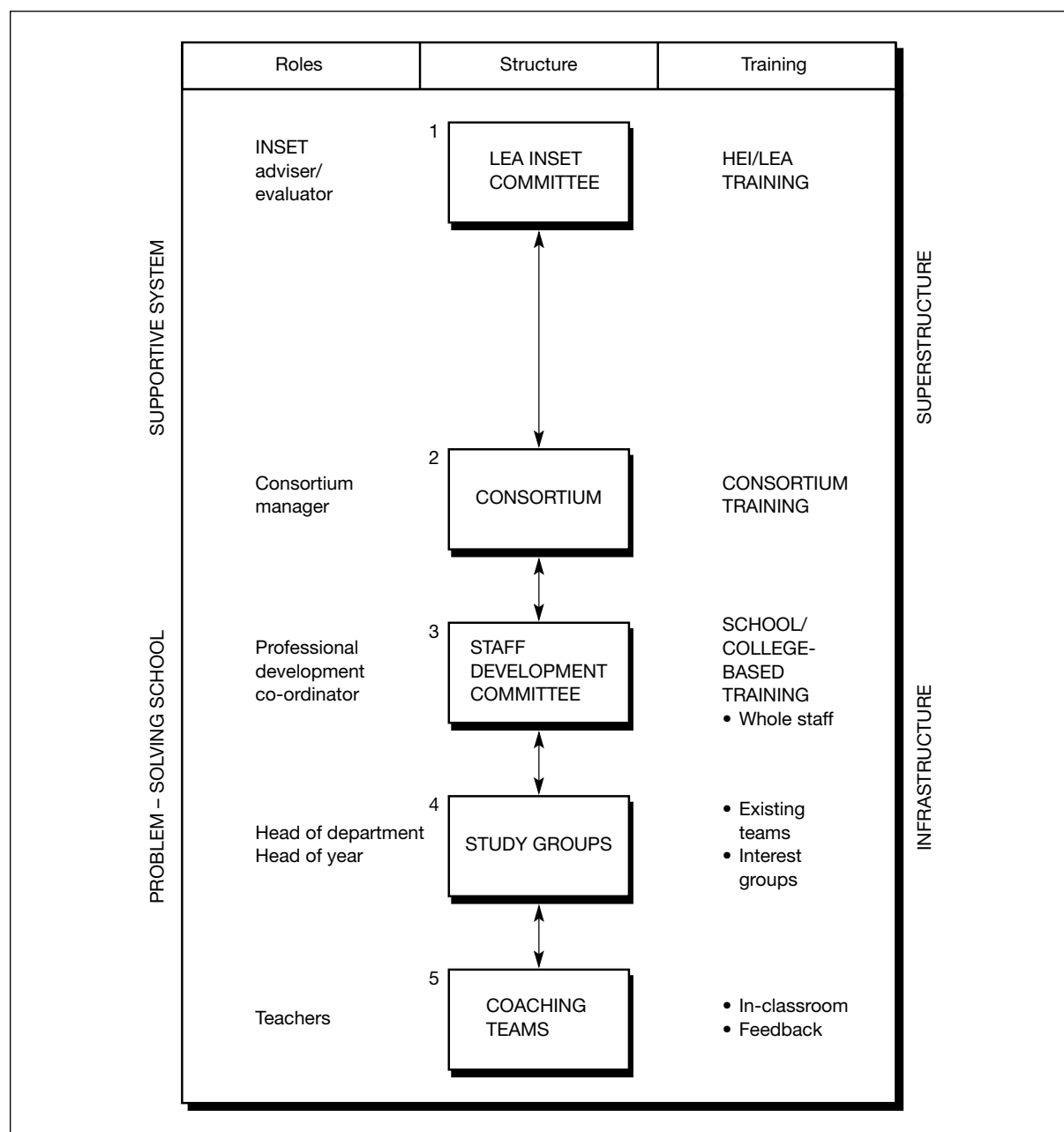
Effective plans require resources if aims, targets and objectives are to be achieved. Funding for staff development is available from several sources:

- **School** – through local management of schools, senior management and governors have delegated control of the allocation of funds. Continuing professional development policies should include a detailed budget indicating funding arrangements related to strategic and operational plans.
- **Local education authorities** will have funds available within their budget for all schools in their area. LEAs will also have expertise in the management and delivery of INSET/continuing professional development. LEAs will work in consultation with schools, HEIs and external agents to support school managers in the development of their staff.
- **Central government** provides funding for professional development through the Standards Fund and national standards for teachers (see Section 7).

If a school is to become a place of professional learning and problem solving for the staff it would seem desirable for the review to link what is planned and offered by the LEA or consortia (superstructure) to structures within the school (infrastructure). The staff development co-ordinator will need to consider the structures for continuing professional development that exist at school and LEA levels. The review process should include suggestions as shown in Fig. 9.4.

## SCHOOL AND LEA ROLES

In most cases schools remain best placed to identify their own development needs and priorities, and therefore a large proportion of the Standards Fund will continue to be devolved to schools. Nevertheless, LEAs also have an important role in supporting schools in raising standards. Since 1998 LEA targets and priorities have been reflected in individual education development plans (EDPs). LEAs need to take account of the EDP and any preliminary planning it has done in making decisions regarding the distribution of devolved funds to schools and, where devolution is not appropriate, decisions on the expenditure of some grants.



**Fig. 9.4 LEA/INSET structure for professional development**

Source: Hall and Oldroyd (1990a)

*The bulk of funds for CPD goes directly to schools in the form of the 'standards fund' and general grants.*

Source: DfEE (2001a)

*When allocating the money to CPD activities, schools are recommended to give consideration to central government initiatives, school needs and individual teacher needs.*

Source: GTC (2002a).

It is worth noting that activities funded through the Standards Fund will not simply replicate or replace those already separately funded from other LEA resources or other government grants, such as the Single Regeneration Budget (SRB) and private finance.

For further information on funding, go to one of the following:

Socrates UK:

[www.socrates-uk.net](http://www.socrates-uk.net)

TeacherNet – the government’s new portal for teachers includes a whole section on continuing professional development, as well as a search facility and a discussion area. This is a comprehensive resource for teachers’ CPD:

[www.teachernet.gov.uk/Professional\\_Development](http://www.teachernet.gov.uk/Professional_Development)

DFES main site:

[www.dfes.gov.uk/index.htm](http://www.dfes.gov.uk/index.htm)

The DFES has a useful page at:

[www.dfes.gov.uk/a-z/THE\\_NATIONAL\\_COLLEGE\\_OF\\_SCHOOL\\_LEADERSHIP.html](http://www.dfes.gov.uk/a-z/THE_NATIONAL_COLLEGE_OF_SCHOOL_LEADERSHIP.html)

Continuing professional development page:

[www.dfes.gov.uk/a-z](http://www.dfes.gov.uk/a-z)

List of home pages for UK departments of continuing and/or adult education:

[www.ex.ac.uk/~PRFChani/ACE/UK\\_CE\\_Depts.html](http://www.ex.ac.uk/~PRFChani/ACE/UK_CE_Depts.html)

National literacy site – professional development section for teachers (part of standards site):

[www.standards.dfes.gov.uk/literacy/prof\\_dev](http://www.standards.dfes.gov.uk/literacy/prof_dev)

Teachers’ International Professional Development – this scheme awards funding to 2600 teachers each year to enable them to witness and experience teaching in other countries. It is organised by the Central Bureau, a division of the British Council; these pages explain how to apply

[www.centralbureau.org.uk/tipd](http://www.centralbureau.org.uk/tipd)

The Institute for Learning and Teaching in Higher Education:

[www.ilt.ac.uk](http://www.ilt.ac.uk)

GTC home page:

[www.gtce.org.uk/homepage.asp](http://www.gtce.org.uk/homepage.asp)

National College for School Leadership:

[www.ncsl.org.uk](http://www.ncsl.org.uk)

Ofsted main site:

[www.ofsted.gov.uk](http://www.ofsted.gov.uk)

Other useful sites are:

[www.instantteaching.net](http://www.instantteaching.net)

[www.shu.ac.uk/bemas](http://www.shu.ac.uk/bemas)

[www.schoolmanager.net](http://www.schoolmanager.net)



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# Executive summary

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This section has provided details on the planning and resourcing of professional development in schools. Key points to consider are:

- Planning is critical to the effective management and implementation of professional development programmes
- Planning involves: plan, act and review
- Planning involves decision making, individually and collaboratively
- Planning should be strategic and operational
- Planning should be recorded
- Resources are available from:
  - school
  - LEA
  - government
  - charitable trusts
- Further information can be found on the world wide web.

The next section will detail how to monitor, evaluate and review professional development.

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# Workshop materials

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## Workshop 9.1

### NINE-STAGE PROCESS

Field (2002, Appendix 1) proposed the following for the development of a portfolio of professional practice. The aim of the nine stage process is:

- to enable teachers to express long-term aspirations
- to generate evidence of competence and development
- to aid the production of a personally relevant professional development plan
- to provide a location and context for evidence of professional development
- the resourcing and provision of relevant and useful INSET opportunities
- to support career development
- to marry professional and academic development.

#### Stage 1 – Identifying needs

- Serves as a needs analysis
- Serves as an indicator of how you can build on existing strengths
- Self-audit against the relevant set of national standards (see Section 7).

#### Stage 2 – Stating aspirations

- Completion of an initial statement, informed by the self-audit
- Enables teacher to indicate to senior staff career aspirations
- Strengths and weaknesses identified.

#### Stage 3 – Target setting

- Targets should be negotiated, not imposed.
- Teachers required to respond to externally imposed policies and requirements
- Targets must relate to teaching and learning.

#### Stage 4 – Finding learning activities

- Attending courses (LEA, HEI, subject associations, other providers)
- Sharing, examining and disseminating practice with fellow teachers
- Observing other teachers
- Being observed by another and receiving feedback
- Reading
- Reflecting
- Taking on new responsibilities
- Being mentored
- Mentoring another
- Experimenting and evaluating new practice.

## Workshop 9.1 (continued)

### Stage 5 – Planning personal development

- Consider your own preferred learning style and particular circumstances when writing the plan
- Use template provided
- A personal, professional development plan should be fully costed (money and time) and approved by the CPD co-ordinator.

### Stage 6 – Logging learning activities

Relevant evidence includes:

- certificates of attendance
- copies of handouts
- observation notes
- minutes of meeting
- records of discussions
- notes from reading.

### Stage 7 – Converting learning into development

- Implement what has been learnt and retain evidence of implementation
- Use planning documents or teaching and learning materials as evidence
- By planning implementation of new ideas, it will become obvious what evidence can be retained.

### Stage 8 – Evaluating professional learning

- Evaluate your personal development plan before your performance development review
- Refer back to your self-audit to assess how you are doing
- Use documentation from the portfolio to help you do this.

### Stage 9 – Measuring impact

- Professional development activities must have a positive impact on pupil learning
- The portfolio encourages teachers to think of impact in its broadest sense:
  - attainment
  - progress
  - motivation
  - stimulation
  - self-esteem.

## Workshop 9.2

### TEACHERS AS A RESOURCE

#### **Observing good practitioners:**

- observing other teachers teaching
- watching a colleague present an assembly
- observing a visiting expert
- shadowing a colleague
- visiting and seeing other schools in action
- taking part in developing a learning community
- observing and working with an artist in residence.

#### **Extending professional experience:**

- leading and contributing to school-based INSET
- rotation of roles/jobs
- developing own professional profile
- co-ordinating/managing a subject
- assuming the role of leader for a special initiative in school
- carrying out action research in the classroom/school
- contributing to a professional publication
- gaining experience of interviewing
- acting as a performance reviewer
- being reviewed
- serving as a governor
- serving on professional committees/working parties
- becoming a union representative
- leading/supervising non-professionals who work in the classroom
- working on extra-curricular activities
- taking part in staff conferences on individual pupils
- working with other professionals such as education psychologists
- working with an exam board or marking exam papers
- networking and sharing with a group of colleagues from another school
- team teaching
- learning through professional practice with others

## Workshop 9.2 (continued)

- developing pedagogy in the context of ICT
- counselling parents
- peer mentoring, e.g. mentoring an NQT
- organising a display in collaboration with colleagues.

### **Working with pupils:**

- taking responsibility for a group of pupils on an off-site visit
- developing teaching skills across a wide age and ability range
- working with pupils on school councils
- working with pupils to present an assembly, play, musical performance or other event
- working with pupils preparing a school year book
- collaborating with peripatetic teachers.

### **Taking time to evaluate your own practice:**

- inviting your peers to observe you
- getting feedback from your own pupils
- analysing class and examination work
- integrating the use of pupil websites and on-line communities into teaching
- using e-mail/video conferencing between pupils in teaching
- negotiating targets and evaluating work alongside pupils
- mentoring individual pupils
- reviewing your marking
- videoing yourself.



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## Section 10

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# MONITORING, EVALUATION AND REVIEW

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The concluding section of this manual focuses on monitoring, evaluation and review. Monitoring and evaluation are critical to the successful implementation of plans at any level. In order to know if the planning for development is successful, the staff development co-ordinator must engage in the process of monitoring and evaluation. This is an increasingly important aspect of the role of all co-ordinators (Day, 1993a) but it is very difficult to do, given limited time and money.

Professional development will only be successful with effective monitoring, evaluation and review procedures. Staff development should be a continuous dialogue. Managers need to identify their role in this process.

This section will describe how to:

- monitor
- evaluate
- review
- measure impact.

# MONITORING PROFESSIONAL DEVELOPMENT

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Monitoring is an essential stage in the planning process. Having implemented a plan, managers will need to monitor its progress. If plans are not monitored, it will not be possible to determine whether objectives have been achieved. Monitoring will also enable managers to obtain the best results from the available resources. The process of monitoring will enable staff development co-ordinators to work towards agreed objectives.

Monitoring will also provide the basis for evaluating practice. Staff development co-ordinators will be able to measure and compare their performance against agreed criteria. Monitoring may also assist co-ordinators in the planning of staff development by providing an insight into the strengths and weaknesses of continuing professional development programmes. Most significantly, monitoring will provide a framework in which staff can reflect on their own practice, an outcome of which is enhanced job satisfaction.

Monitoring is an ongoing activity. Modern and effective CPD is to be based upon ten key principles, highlighted in the National Strategy (DfEE, 2001b, p. 24):

- teacher ownership, and a shared commitment to, and responsibility for (by teachers and schools) development
- professional development should be centred on raising standards
- development opportunities should match different needs
- there should be equality of opportunity for professional development
- new and innovative ways of using time and resources for CPD should be sought
- ICT should be central to CPD
- high-quality CPD depends upon schools being discerning customers
- planning and evaluation are essential components of CPD
- good practice should be shared and disseminated, using ICT.

## PRACTICE

Monitoring is integral to teaching and learning. In the process of planning education, the two questions a school leader needs to ask are given in the following checklist.

### Checklist

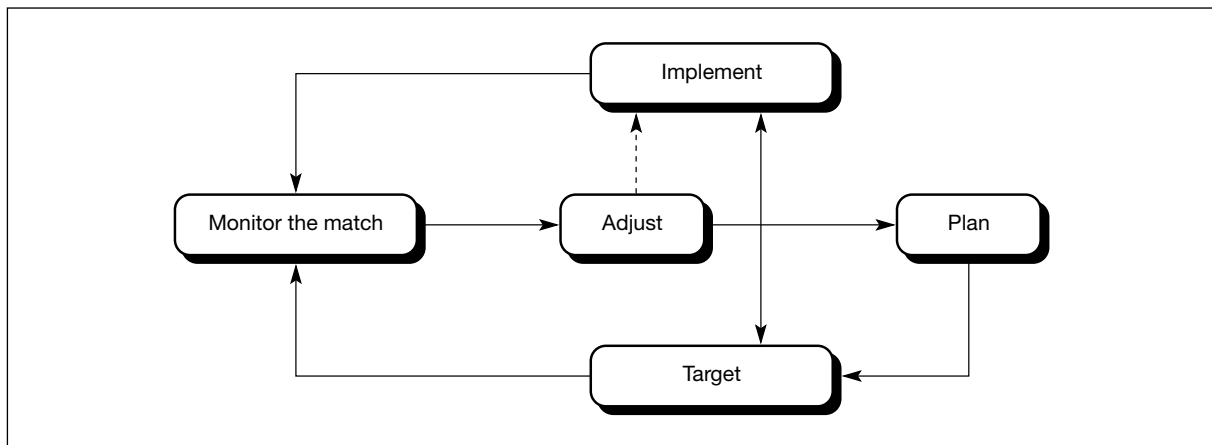
#### Monitoring – key questions

- Who is monitoring what, in which ways and with what effectiveness?
- Who is responsible for adjusting what, in which ways, when and with what effectiveness?

*Source: Hargreaves (1995)*

Figure 10.1 illustrates that, having implemented a plan, co-ordinators and senior managers need to monitor its progress. If plans are not monitored, it will not be possible to determine whether objectives have been achieved. Monitoring is made easier if objectives are:

- clear and practical
- agreed by all members of the team.



**Fig. 10.1 Development planning feedback loop**

*Source: Hargreaves (1995)*

Once objectives have been agreed, the co-ordinator can move forward with confidence. From clear objectives comes a sense of purpose. It may be difficult to obtain co-operation and agreement when deciding on specific objectives. However, it is important to reach agreement with staff if the plan is to work effectively.

Monitoring is an ongoing activity that requires regular progress reports. It should not be left to the end of the year. Monitoring information is needed to enable schools to follow the implementation of the professional development policy. This will include:

- operational information
- financial information
- information on performance.

Monitoring aims and objectives in action is a constant and consistent activity in schools. The following checklist serves to ensure this.

**Checklist****Key questions**

- Who monitors the school in action?
- How is the monitoring carried out?
- How are the governors (and parents) kept informed?
- How is the evaluation carried out?
- Who prepares the final report?

For operational and financial information, staff development co-ordinators need to monitor actual expenditure and operations regularly and to take corrective action. Monitoring of actual spending against budgets is likely to reveal projected over- or underspending. A staff development co-ordinator will need to assess the relationship between individual needs (appraisal targets) and school aims (school development plan). Resources will need to be allocated appropriately and plans monitored according to the most beneficial use of internal and external expertise. The co-ordinator will also need to monitor staff development opportunities available from LEA and government initiatives.

Monitoring will be an ongoing two-way process, assessing need, gathering information, and communicating and recording progress against agreed targets. This activity requires regular checks. A checklist for the monitoring of continuing professional development in schools follows.

**Checklist****Monitoring continuing professional development in schools**

- Performance review – targets
- School development plan
- Resources – funding arrangements
- Internal expertise
- External agents
- LEA initiatives
- Government initiatives.

# EVALUATION

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Whereas monitoring is an ongoing process, a means of checking progress, evaluation acts as an overall check on whether objectives are achieved within the planned timetable. Evaluation should be a collaborative process. The desire to achieve success is motivating; evaluation should focus on success in addition to identifying areas that require improvement. In practice, external and internal accountability are central to educational and management practice in schools. The appraisal of teachers is a key factor in the evaluation process. The introduction of job descriptions and school curriculum policies has given teachers a more precise role definition by which they can evaluate their position in the school.

In addition, governing bodies are required to manage the implementation and evaluation of their own policies. Senior and middle managers must provide evidence to support the efficiency and effectiveness of teaching and management. Evaluation is a component of development planning and a prerequisite for preparing any subsequent plan.

### Checklist

#### What is the purpose of evaluating plans?

- To examine the success of the implementation of the plan
- To assess the extent to which the school's aims have been furthered
- To assess the impact of the plan on pupils' learning and achievement
- To decide on how to disseminate successful new practices throughout the school
- To make the process of reporting easier.

The process of evaluating the impact of a plan on practice is critical to its successful implementation.

### **Checklist**

#### **What is involved in the evaluation process?**

- Asking questions
- Gathering information
- Forming conclusions

In order to:

- Make recommendations.

*Source: Hall and Oldroyd (1990b)*

### **Checklist**

#### **Planning and evaluation**

- 1 Purposes, broad guidelines, aims or objectives for the subject under scrutiny, which are:
  - clear
  - indicators of desired performance or outcomes.
- 2 Questions, which are:
  - unambiguous
  - penetrating
  - useful.
- 3 Information, which is:
  - accessible
  - related to questions
  - not too voluminous to handle.
- 4 Conclusions, which consider:
  - conditions
  - effects
  - assumptions
  - alternatives.
- 5 Reports, which are:
  - concise
  - focused on audience's need
  - likely to inform decision making.
- 6 A good evaluation brief:
  - specifying much of the above.

*Source: Hall and Oldroyd (1990b)*

In contrast to monitoring, evaluation encompasses reviewing the status of a plan's objectives. Through the evaluation process, managers will be able to determine the need to change objectives, priorities and/or practice. Readers should note the importance of evaluation in enhancing the professional judgement of teachers. Evaluation can lead to a change in teachers' perception of their practice. For co-ordinators, the evaluation of key stage/year/department plans can provide the basis for action.

## **CONSULTANTS: QUALITY OF SERVICE**

In addition to evaluating the professional development programmes, staff development co-ordinators will also need to evaluate the quality of consultants/external agents.

### **Checklist**

#### **Questions to consider when evaluating the quality of a service**

- How satisfied are we with the quality of the programme under existing arrangements, e.g. in terms of general standards of the programme and management?
- How flexible are the consultants – do they meet our individual requirements?
- Would we have more control if we altered the arrangements?

If the responses are negative, revisit the agreed contract (see Section 6) and act to resolve any differences. At the end of this section, Workshop 10.1 provides a grid for evaluating practice.

## **REPORTING**

The final stage in the evaluation process is to write the report. A co-ordinator would have to provide a written report on the evaluation of the professional development programme. It will be important to bear in mind the purposes of the report, including considering aspects of the evaluation process.

### **Checklist**

#### **Evaluation report contents**

- Purpose
- Content
- Process
- Context
- Outcomes.

Before disseminating the report, the writer should reflect to ensure that only necessary and relevant information is presented.



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## Chapter 39

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# REVIEW

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To enhance the personal and professional lives of teachers, professional development needs to be clear and useful. The key question central to the review process will be: 'What does professional development bring to a professional career?'

Schools should move towards seeing themselves as learning organisations. Staff will feel valued when their managers assist them in their training and development. Schools as organisations should identify and meet the needs of individuals. A review must include all aspects of professional development, as detailed in this manual.

### Checklist

#### Key areas for review

- Time and financial resources
- Access to appraisal data (for needs identification purposes) and links to professional development
- Clarity between individual needs and those of the school development plan
- Systems for identifying the training needs of both teaching and support staff
- Systems of communication and dissemination of INSET provision and outcomes
- Systematic evaluation of professional development to inform processes of development planning
- Flexibility of existing training service provision (e.g. links to local education authorities)
- Roles of deputy head(s)
- External initiatives (e.g. national standards)
- Teacher attitudes
- Culture of lifelong learning
- Monitoring INSET provision
- Evaluating INSET to determine its impact on improving subject teaching and raising standards of pupils' achievements
- Attention to dissemination and to follow-up activity, to sustain the momentum of training, to broaden expertise and to share good practice.

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## Chapter 40

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# MEASURING IMPACT

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It is clear from Graham et al. (2000, p. 29) that the focus for CPD is dual – in that it should be intended to benefit the individual and the school in the following ways:

Aspects of impact	
Individual	School
Promotion	Recruitment
Motivation	Retention
Morale and job satisfaction	Participation in innovation
Sense of correctness	Development plans
Personal growth	Pupil assessment scores
Qualifications (professional)	

More specifically, professional development will impact upon others. Professional development should have a positive impact on learners. As Field (2002, pp. 40–1) states:

*The positive outcomes of professional development might include:*

- a) improved attainment scores*
- b) improved rate of progress*
- c) increased interest and/or motivation*
- d) improved pupil autonomy*
- e) improved pupil social skills and behaviour*
- f) improved pupil attendance and punctuality.*

Frost and Durrant (2002) through research and practice have devised a framework that can be used to measure the impact of teacher-led development work, as outlined in the following checklists.

### **Checklist**

#### **Factors that can affect the impact of development work**

The factors are set out under the headings of 'focus', 'context' and 'process'.

##### **The focus of the development work:**

- relevance to the teacher
- relevance to the school development plan
- relevance to improving teaching and learning
- degree of leverage.

##### **The context of the development work:**

- synergy in relation to other policies, agendas and initiatives
- the interests, values and aspirations of key protagonists
- the structure and quality of leadership in the school
- the structure and quality of external frameworks of support and challenge
- organisational structures and processes within the school
- the organisational culture(s) within the school.

##### **The process of the development work:**

- the quality and appropriateness of information and evidence on which proposals for change are based
- the effectiveness of presentation and dissemination of information and evidence
- the extent and intensity of the participation of relevant members of the school community
- the quality and appropriateness of strategic action plans
- the effectiveness of leadership and support
- the effectiveness of co-ordination between development activities
- the effectiveness of monitoring and evaluation of the development work in progress.

## **Checklist**

### **Impact on teachers**

The impact of teachers' development work on themselves and their colleagues is set out under the headings of 'classroom practice', 'personal capacity' and 'interpersonal capacity'.

#### **Classroom practice:**

- the adoption of new practices by the teacher
- the adoption of new practices by the teacher's colleagues
- the improvement of the effectiveness of established practices on the part of the teacher
- the improvement of the effectiveness of established practices on the part of the teacher's colleagues.

#### **Personal capacity:**

- increase in pedagogical knowledge and skills
- increase in professional knowledge (e.g. micro-political literacy)
- development of new strategies for professional learning (e.g. engaging in enquiry)
- development of personal attributes (e.g. reflexivity, emotional intelligence, self-awareness, self-confidence)
- enhanced clarity of purpose and commitment.

#### **Interpersonal capacity:**

- enhanced level of participation or involvement
- the development of skills in building and maintaining professional relationships.

## **Checklist**

### **Impact on the school as an organisation**

The impact on the school as an organisation is set out under the headings of 'structures and processes' and 'culture and capacity'.

#### **Structures and processes:**

- more effective structures for deliberation and decision making
- improvements in the structure of leadership
- greater degree of shared leadership
- more collaborative working patterns.

#### **Culture and capacity:**

- increase in the use of evidence
- improved collegial relationships
- improvements in the quality of professional discourse
- high level of consistency in practice
- greater levels of coherence in beliefs and values.

### **Checklist**

#### **Impact beyond the school**

- Contributions to debate with the research community
- Contributions to policy formation or critique of policies
- Dissemination of evidence-based practice
- Collaborative development work with other teachers and schools
- Improved levels of social capital in the local community.

### **Checklist**

#### **Impact on pupils' learning**

The impact on pupils' learning is set out under the headings of 'attainment', 'disposition' and 'metacognition'.

##### **Attainment:**

- improved test results
- learning in other curriculum areas (e.g. citizenship)
- discernible increases in subject knowledge, understanding and skills
- improvements in transferable and key skills.

##### **Dispositions:**

- the development of more positive attitudes to school and particular subjects
- increased motivation to learn
- increased confidence and self-esteem
- improvement in the quality of relationships.

##### **Metacognition:**

- development of self-awareness
- increased capacity to reflect on and evaluate their own learning
- more able to take responsibility for their own learning.

## **Checklist**

### **Evidence of impact**

The gathering and use of evidence plays a key role in maximising impact.

- Evidence generated for other professional purposes is analysed to determine impact (e.g. assessments of pupils' work)
- Monitoring and evaluation is part of the framework of support and challenge for development work provided by senior staff or external agents
- Evidence is gathered deliberately and systematically to inform and sharpen the development work
- The gathering of evidence of impact and collaborative reflection on it helps to build organisational capacity.

After the gathering of evidence on the impact of professional development, the next stage for practitioners and managers/team leaders is to work together on identifying SMART targets for action (see Workshop 10.2).

Remember: *professional development should make a difference.*

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# Executive summary

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This section has provided details on the final stage of developing and implementing professional development in school: monitoring, evaluation and review. Key points to consider are:

- Monitoring and evaluation are critical to the successful implementation of plans at any level
- Monitoring is an ongoing process, integral to teaching and learning: it should not be left to the end of the academic year
- Evaluation is an overall check on whether objectives are achieved within the planned timetable
- Review should answer the question ‘What does professional development bring to a professional career?’
- Professional development should make a difference.

*There is a great difference between knowing a thing and understanding it.*

*Source: Charles Kettering*

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# Workshop materials

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## Workshop 10.1

### EVALUATING PRACTICE

The following grid will assist staff development co-ordinators in evaluating practice. Use it to evaluate your professional development policy.

<div style="display: flex; align-items: center; justify-content: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg);">STEPS</div> <div>SCOPE</div> </div>	DURING		AFTER	
	Monitoring	Formative evaluation	Summative evaluation	Review
1. Questions (from objectives/targets)				
2. Information (gathered by observation, review etc.)				
3. Conclusions (based on criteria for judging)				
4. Recommendations (to inform decision making)				

*Source: Hall and Oldroyd (1990b)*

## Workshop 10.2

### ESTABLISHING AGREEMENT ON GOOD PRACTICE

**Purpose:** To establish agreed perceptions/indicators of good practice in teaching/learning through building a common list of questions/statements

**Materials:** A flipchart with prepared headings and a pen

**Grouping:** Professional Development Management Team,

**Time:** 1 hour

- Decide on the goal for INSET this term
- Specify objectives that are SMART
- List questions for:
  - monitoring
  - evaluating
  - review.
- Devise a time reporting plan for completion of monitoring, evaluation and review of professional development activities.

## Workshop 10.3

### EVALUATION OF TEACHING AND LEARNING

**Purpose:** To consider what sort of information is required for the evaluation of teaching and learning

**Time:** 1 hour

**Materials:** Flipchart with prepared headings and a pen for each group

**Groupings:** Initially 15 minutes are spent working individually. Then move into groups of three to six to negotiate common lists of questions or statements. In a small school, this can be done by the whole staff. In a larger primary school, each group should include teachers from Key Stages 1 and 2. In secondary schools, groups should be made up of staff from different departments faculties and different pastoral teams.

Each group will need to appoint a 'scribe' and someone to feed back to the whole staff in the next exercise. The lists of agreed questions or statements should be written up on a flipchart sheet for feedback to the whole staff.

It is suggested that the following headings are used both for group flipcharts and the master flipchart.

Learning environment	Management of learning	Pupils' responses	Effectiveness of pupils' learning

#### Information needed to inform evaluation

- In relation to the organisation of the learning environment, make a list of questions or statements designed to elicit how stimulating, encouraging and supportive of learning (including independent learning) an area or classroom is
- In relation to the management of learning, make a list of questions or statements designed to elicit how well matched learning opportunities are to the needs of all children and the range of supportive techniques used to enable pupils' learning
- In relation to pupils' responses to opportunities for learning, make a list of questions or statements designed to indicate the level of pupil involvement in learning activities (depth and extent of involvement)
- In relation to the effectiveness of pupils' learning, make a list of questions or statements which will elicit whether learning outcomes match planned intentions, whether thinking/skills/competencies have been developed and whether pupils are aware of/help to monitor their own progress.

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