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Performance management

From 1 September 2007, new performance management regulations will be introduced in the state sector. The regulations have been developed by the Government in consultation, and agreement, with the trade unions involved in the social partnership, including ATL.

The purpose of the new performance management regulations is to develop a culture of greater transparency, fairness and consistency where all teachers are supported fully throughout their careers; all teachers have an entitlement to effective professional development. This in turn should contribute to improving pupil outcomes.

By common consensus, the new performance management regulations enhance teacher professionalism and will be of major benefit to individual teachers and to schools as a whole.

So while there is no legal requirement for schools in the independent sector to introduce the new performance management regulations, there is every reason why independent sector teachers should be treated on a similar professional level.

Of course, ATL recognises that every independent school is different and may not be able, nor wish to, adopt the regulations in their entirety. However, ATL believes that every independent school should have a performance management policy and that the policy should be reviewed in the light of this new best practice.

For those independent schools without a performance management policy, now is the ideal time to implement one. Schools can benefit from the shared expertise and learning experience of the state sector and the models and guidance available.

As one of the originators of the new policy, ATL and our members are well placed to assist independent school employers in implementing their policies. ATL can contribute to the school's policy; provide training courses for ATL members; or support and train members to become Learning Representatives to compliment school management in identifying continuing personal and professional development.



fairness



consistency



transparency

Principles behind performance management

Performance management should be an ongoing professional conversation that enables a teacher to develop at each stage in their career, with its success based on agreement, not imposition. This dialogue should start from the beginning with consultation in formulating the school's performance management policy. In the state sector, it is not only integral to the success of the policy but, a statutory requirement that staff and their professional trade union representatives are consulted.

There should be no surprises. A formal meeting each year reviews the previous year and plans the forthcoming year. Objectives should be agreed and documented in a written statement, which should also include the agreed support and training.

Objectives can be individual, team or school based. The number of objectives, and their level, must be reasonable and achievable within the context of the school, the individual teacher's job description and experience.

There should be a balance between the needs of the school and the individual aspirations of the teacher. The former, as expressed for example in a school development plan, may give rise to an objective shared by all teaching staff. The latter may lead to a professional development opportunity unique to one teacher.

Teachers cannot be held responsible for not meeting objectives if the individual professional support agreed at the beginning of the cycle does not happen.

The agreed plan must be moderated at a general level by the headteacher to ensure consistency between staff, and compliance with the school performance management policy and equalities legislation.

Both the appraiser and the appraisee must receive adequate training in order to get the most out of the performance review.

Sufficient time must be set aside for the training and for the review process. It should not come out of existing Planning, Preparation and Assessment time, nor add to the length of the school day. Many state sector schools are using INSET days for the training.

ATL has long campaigned and negotiated in the social partnership to put career development and professional training at the heart of teacher professionalism. Our members in the independent sector can benefit from this success through benchmarking.

The responsibility of providing continuing professional development (CPD) rests with the school. Adequate provision must be made in the form of a CPD budget, with consideration of equitable access for all staff.

In addition to school provision, ATL provides a whole range of short courses for members which cater for professional and personal development, from *Using Your Voice* to *Shaping Your Career*. Nearly all of our courses are accredited by the Open College Network. Full details can be obtained from the training department, by telephoning **020 7782 1582**, or email: **training@atl.org.uk**, or on our website at: **www.atl.org.uk**.

ATL has also established a ground-breaking formal partnership with Edge Hill University that will provide ATL members with further opportunities for professional development. Furthermore, the vast majority of these new accreditation opportunities are free to all ATL members, teachers, lecturers and support staff, and it is provided wherever you live. Edge Hill University accreditation programmes are flexible, innovative and focussed on impact in the classroom. Edge Hill offer both an undergraduate programme and a postgraduate programme of accreditation up to and including an MA in Education. Non-qualified teachers, for instance, could obtain a PGCE on an undergraduate course for as little as £615.



The key issues:

Performance-related pay

The new system does not alter the link between performance and teachers' pay progression in the state sector; it just makes it more open and explicit.

Many independent schools operate a pay scale where progression beyond a threshold is assessed on performance. It is possible that more independent schools may adopt such a pay policy in the future, in response to the new age regulations, which enable a possible legal challenge to long pay scales based solely on service.

If you do have performance related pay, we would suggest that ATL members discuss its implications and decide what they want from any new policy. ATL recommends that progression on a discretionary pay scale should be based on clear, transparent and fair criteria.

Classroom observation

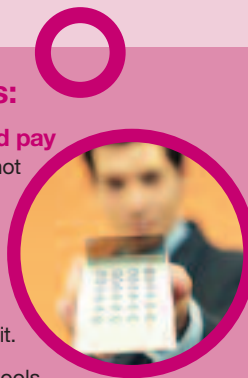
Observation is a central part of evidence gathering for performance management. Unfortunately, many independent schools do not have a lesson observation policy, leading to avoidable stress for teachers, and a lack of rigour and consistency for management.

Under the new regulations, every state school will have to produce a protocol for classroom observation. A model will be provided.

The observer has to be an appropriate professional and oral feedback must be given as soon as practicable afterwards, with a written report within five working days. The overall annual maximum for observation is three hours but the amount should be proportionate to need. An experienced teacher whose classroom performance is not in doubt might need to be seen much less often; a new teacher, or one about whom there are concerns, might need the entire three hours. The limit does not apply to headteachers exercising their right to 'drop-in' (but this observation cannot be used as evidence for performance management).

Continuing professional development

CPD is central to successful performance management. CPD is not a bolt-on extra but an essential part of every teacher's work. CPD can take many forms: observing and discussing others' good practice or collaborative work, for example. Sometimes a short course is useful, and for some academic study might be appropriate.



Union learning representatives



In addition to the opposite training courses, ATL supports and trains members to become union learning representatives (ULRs). A ULR specialises in advising and supporting members with their continuing personal and professional development, working closely with school management to identify ways to improve access and the quality of current provision. Further information is available from ATL's website or by contacting Kate Quigley on tel: **020 7782 1558**, or email: **kquigley@atl.org.uk**.

Mary Bousted, ATL's general secretary, says: "ATL believes that as professional employees, teachers should be entitled to the kind of management which takes seriously their aspirations for professional and career development. For the first time, contractual arrangements in the state sector make this a reality. It will be the responsibility of every teacher to reflect on their work and their professional future, and to discuss the resources they need to improve their performance and to develop as professionals, and it will be the responsibility of every manager to take seriously the aspirations of those they manage."

The new performance management regulations will enhance teacher professionalism. Consequently, ATL believes that the independent sector should be looking to adopt these advancements. Of course, we know that every independent school is different, and not every part will be applicable. However, that should not prevent independent school employers from incorporating best practice, supporting staff, and raising standards of professionalism."

ATL's recommendations for the independent sector

ATL recommends that all independent schools should have:

- ✓ an on-going appraisal system;
- ✓ the right to CPD;
- ✓ protocol for lesson observation;
- ✓ clear, transparent pay progression.

These policies should be developed in full consultation with staff and their trade union representatives.

If your school does not have these policies and procedures, or existing policies could benefit from review in light of the advancement in the state sector, then ATL would encourage you to engage with school management to seek these improvements. As a first step, you may wish to meet with your fellow ATL members and other colleagues to discuss what staff would like to see put in place.

Resources

ATL has negotiated a new set of professional standards for teachers. Whereas a job description describes what a teacher does, the standards describe the expected quality of the work, depending on career stage.

ATL have also been involved in developing a series of Performance Management: How To sheets to help school leaders and teachers through the new performance management arrangements.

Both the professional standards and How To sheets have been coordinated by the Training and Development Agency and are available to download from their website at: **www.tda.gov.uk**.

Further information is available on ATL's website at: **www.atl.org.uk**.

Victory for ATL: Staffordshire School reinstates Head of English

In the last edition of *Independent Teachers*, we reported the sacking of an ATL member, which led to members at the school taking historic strike action.

We are happy to be able to report that, after lengthy negotiations with the school governors and the new Principal, our member has been reinstated. This is a great victory for ATL.

Peter Cash was dismissed without reason from his post as Head of English at a Newcastle under Lyme School. The dismissal was the final act of the outgoing school Principal, on his last day at school. In total disregard to employment law, there was no notice given or any procedure followed.

ATL officials worked tirelessly behind the scenes to persuade the school to reinstate Peter on the basis of natural justice and the good name of the school. Unfortunately, good advice fell on deaf ears. ATL members concluded that the only way to get the governors to listen was to take the radical step of striking for a day, which they did, supported by their colleagues from the NASUWT.

Stunned by the staff's principled and resolute stand, and coming under increasing pressure from parents and pupils, who were also campaigning for the reinstatement of this popular teacher, the governors returned to the negotiating table. Positive discussions then ensued with the new Principal, Mr Rugg.



Dr Mary Bousted, general secretary of ATL, said: *"This is a victory for fair play and employment rights. We are delighted that the school has seen sense and decided to reinstate Peter Cash."*

"ATL nationally, together with its members at the school, has fought hard for this result. The one day strike showed that the staff would not stand by and allow a colleague to be treated badly."

"There has been solid support for Mr Cash throughout, from current and former pupils, parents and school staff. We hope everyone will now allow Mr Cash to get back to doing the job he loves, teaching children."

Peter Cash added: *"I am delighted to be returning to the school where I have worked for 22 years. I am especially looking forward to working under the direction of the new Principal, Mr Rugg, and to seeing the pupils again."*

"I should like to thank the many individuals who have supported me over the last five months: colleagues past and present, parents past and present and of course pupils past and present."

"I am particularly indebted to Geoff Scargill, ATL regional official, and Dave Murtagh, chair of the common room at Newcastle under Lyme School."



Get active and play a part in your union

The Independent and Private Sector Advisory Group advises ATL's Executive Committee on all matters relating to the independent sector. The next elections to the committee will be held in 2008. Full details will be available from ATL's website at: www.atl.org.uk in due course but if you would like to express an interest in sitting on the committee please contact John Richardson by email: jrichardson@atl.org.uk.

ATL's education and policy department is looking to set up email contact groups of members to contribute to ATL policy in various areas, and they are keen to gain input from the independent sector's perspective.

Email contact groups have been set up for equalities, early years, primary and special educational needs. Members of the group will receive occasional emails and be invited to contribute to consultation responses and other ATL policy work.

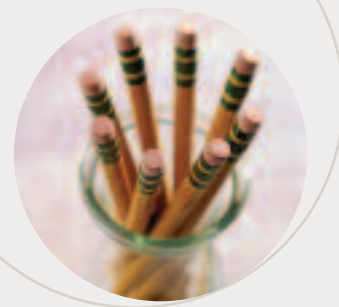
Anyone who is interested in becoming involved should contact Julie Gillespie by email: jgillespie@atl.org.uk.

Independent Schools Conference – advance notice!

The date for the next ATL conference for members working in independent schools will take place on Saturday **17 November 2007**. This one-day, non-residential event will be held in London.

Come and meet your fellow colleagues and find out what is going on elsewhere in the sector. The **Independent Schools Conference** provides a key opportunity for ATL members to share experiences, discuss opportunities and problems, and to contribute to ATL's policy-making process.

The main speakers on the day will be Julia Neal, ATL President, and Jonathan Cook, general secretary of the Independent Schools Bursars Association. The talks will include discussions on the role of the bursar and current issues such as the Charities Act and the Public Benefit test. There will also be seminars on performance management and on *Working in the Independent Sector*, ATL's handbook for independent members. Full details of the arrangements and how to book will be posted on ATL's website at: www.atl.org.uk.



Being an ATL independent rep

The next Being an ATL independent rep course will be held on **Friday 2** and **Saturday 3 November 2007** in Nottingham. Should you be interested in booking a place on this course please contact ATL's training department by email at: training@atl.org.uk.



Delegates being put through their paces on the Being an ATL independent rep course in May 2007.

GET ACTIVE



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