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performance
management
work for you

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Foreword	2
Introduction	3
Performance management: how it works	3
Reviewing the past year	3
Planning the coming year	3
How to choose objectives	4
Professional development	6
Monitoring	7
Being observed	7
Reviewing progress	7
What I have done	7
How I know I've made progress towards an objective	8
What if my objectives have not been met?	8
Next steps	8
Illustrated example	9
Conclusion	10
Further information	11
Additional support	12

Foreword

ATL is the education union. This means that ATL concerns itself with all aspects of its members' working lives. Just as we are concerned with the education of our pupils, so ATL is fundamentally committed to the further education of its members: teachers, lecturers and support staff working in all ages and phases of education. It is ATL who understands that our members need to develop their skills, to widen their knowledge base and to engage in life long learning, if they are to be successful in developing their careers and in meeting their aspirations. That is why ATL, in negotiation with government on the revised performance management (PM) policy, to be implemented for teachers in all state schools in England and Wales from September 2007, insisted that, accompanying the objectives set for each teacher in the PM process, had to be a clear statement of the support and professional development that would be available to them in order to meet their objectives.

It is ATL that has put CPD at the heart of government policy for the teaching profession. This emphasis is also clearly evident in the forthcoming requirement that all FE lecturers will be engaged in 30 hours of CPD each year.

ATL has supported the union learning project strongly. We recognise that the concept of members supporting one another in their career and personal development is a brilliant, exciting and innovative concept. And as CPD becomes enshrined in each teacher's and lecturer's professional development, the need for union learning reps (ULRs), able to identify learning opportunities for members and help them gain access to personalised CPD, will become even greater.

That is why ATL has published this booklet, written by Sara Bubb. We want our members to feel confident and empowered as they embark upon the new PM system in schools. This, short and very readable booklet gives teachers guidance on objective setting and on the range of professional development opportunities which should be open to all. It should also support the achievement not only of school wide objectives, but also the personal career aspirations of individual teachers. It will also support ULRs who are working so effectively to make relevant, personalised and effective CPD a reality for ATL members.

Dr Mary Bousted

ATL general secretary

Introduction

Teaching is a wonderful career but it isn't easy and improving your teaching methods isn't just a matter of experience or trial and error. Performance management is the statutory procedure for ensuring all teachers (except newly qualified teachers on induction) discuss their teaching, career plans and how to become more effective. Implemented well, it should make you feel valued, give you a clear picture about your work and help you to develop, but it will take time, skills and commitment on the part of the reviewer and you.

Performance management: how it works

Someone who knows your work will be nominated as your 'reviewer'. You will have one formal meeting each year, which has two parts: reviewing the previous year then planning the next. The following may prove useful prompts for you.

Sara Bubb, the author of this booklet, is well-known for her writing, training and other work in the fields of performance management, induction, professional development and workload.

Reviewing the past year

What's gone well? Looking at the main elements of your job description, your previous objectives and professional development to consider not only what you have done but also the impact of your work. Use evidence from as broad a base as possible. You could, for instance, include:

- feedback from pupils, parents and colleagues;
- an analysis of test results;
- self-evaluation;
- observations of your teaching;
- planning, evaluations and work samples that demonstrate progress, and the impact of assessment for learning.

Use benchmarking data to compare the impact of your work with others in a similar context nationally and locally. For instance, if you're in London, use the *Family of Schools* to compare your work with other schools in your group.

Planning the coming year

Using some of the answers you provided above you then need to think about what you would like to achieve in the next twelve months. You should think about:

- what you would like to improve and why; what's the current picture?
- how does this fit in with the school improvement plan?
- how does this fit in with your career plan and any standards you're working towards?
- how will you know that things have improved in twelve months time?
- what do you need to do to meet your objectives?
- what support from the school, including professional development, would help you?
- how should your progress be monitored?

As an outcome of this meeting a draft performance review statement should then be given to you for your agreement within five days. The completed review statement should be with your headteacher within ten days of your review. During the year, you and your reviewer should keep an eye on your progress towards meeting your objectives and take any supportive action necessary. At the end of the year a formal review of your progress should be held with your reviewer and new objectives should be set for the following year.

How to choose objectives

Under the 2007 PM arrangements you can have as many or as few objectives as you like and they don't have to relate to any particular area. One objective is enough but you may want to use a model of choosing one to do with teaching, another relating to your other roles within the school and perhaps another about you as a person. This last point is important. PM, and the professional development that goes with it, needs to support and increase teachers' wellbeing, physical and emotional resilience, job satisfaction, sense of achievement and commitment. This is particularly relevant when teaching in challenging conditions.

We are often told that objectives should be SMART: Specific, Measurable, Achievable, Relevant and Time-bound. This is, of course, true of learning objectives in lesson plans or targets on Individual Education Plans but it's easier said than done. For instance, *Improve control* may be too general, and could benefit from being more specific about what needs most urgent attention. *Improve control* could therefore be expanded to *improve control, particularly during transitions, after breaktimes, in independent activities and at tidying-up time*.

It makes sense for individual's objectives to link in with other developments in the school, wherever possible. But be sure that the intended impact is focused on the impact of your development. For example, in a school where the priority was to *improve the quality of teaching in mathematics* an individual teacher's objective was to *participate in training in the teaching of mathematics through school-based courses, self study and observation of other teachers*. This objective is confused with the activity; will participation mean that learning takes place and will there be an impact in the classroom? Not necessarily!

It's useful to think of how you will know whether things are better in a year's time. Aim high but be realistic. These points then become your success criteria, around which you draw up an action plan of what needs to be done and when. When the professional development coordinator has the big picture of everyone's' needs, inset days or training can be organised around common areas.

The table below illustrates the process of setting an objective or success criteria and how progress is to be monitored.

Questions	Examples of answers
What would you like to be better at?	Challenging more able pupils.
Why? What's the current picture? What's the evidence?	Test results, work samples and my gut feeling show that average pupils, and those with special needs, are making better progress in comparison with other classes at this school and others. However, my more able pupils' results were disappointing; they could have done better. Their parents are not as pleased as others. Some of the very able pupils mess around and avoid working.
How does this fit in with the school development plan?	Perfectly. The school endeavours to raise the achievement of all pupils.
How does this fit in with your career plan and any standards you're working towards?	It will help me be a better teacher, and help me fulfill the upper pay scale standards.
How will you know that things have improved?	Higher attainers will be engaged in lessons, will produce good work and will make progress in more than two NC sublevels in a year. As a consequence of their achievement the rest of the class may also improve.
What do you need to do to meet this objective?	Identify pupils with potential for high achievement; I may have missed some. Plan more challenging work. Where possible, set pupils purposeful problems to solve. Raise expectations of what they can achieve. Develop my questioning skills so that I can really get them thinking. Consider organising mentoring by older successful pupils. Look for opportunities for pupils to extend themselves outside school. Get involved in any competitions or projects.
What support from the school, including professional development, will help you?	Time to discuss strategies and resources with the gifted and talented coordinator, including how to use <i>Bloom's taxonomy of questioning</i> . Find ideas from websites such as the London, gifted and talented website (www.londongt.org). Observe two teachers (one in this school, one in a higher achieving school) with a reputation for challenging more able pupils, and discuss strategies.
How should your progress and its impact be monitored?	Keep track and ensure that activities occur by the dates agreed. In the third week of March, the reviewer should observe a lesson and look at the work of three pupils to monitor impact.

Professional development

Once you've chosen the area you want to develop you need to decide how you're going to do it. What budget or time allocation do you have? Whatever there is, it's unlikely to be a fortune so spend it well for maximum impact. Choose something that's going to work for you within your timescale. The range of professional development activities is huge, and includes:

- watching someone teach, such as a teacher, an assistant, a football coach, a learning mentor;
- visiting someone with a particular expertise, or inviting them to the school;
- enrolling on a course or at a conference;
- watching Teachers' TV (www.teachers.tv);
- visiting another school;
- reading a relevant book, paper or document;
- finding someone to observe and coach-mentor you;
- joining an online community e.g. www.tes.co.uk;
- team teach;
- training others;
- trying things out, evaluating them and trying again;
- listening to pupils' views of the area you're trying to develop.

Be creative in selecting the activity that will get you nearest to your goal. What about observing others, being observed, watching a programme, talking to someone? There will be people in your own and neighbouring schools to learn from, so ask if they can be freed up to work with you. Advanced Skills Teachers are ready and waiting to be used in this way, but so are lots of teachers.

Reading is one of the most individualised, cheap and flexible ways to get ideas, and it's enjoyable and easy and can be done just about anywhere. The TES staffroom and resource bank are used by thousands of people every day for this purpose.

Peer observation, where individuals observe each other for mutual benefit, is an excellent way to develop. Where it works best, schools have invested time in organising it and building a climate of trust. Those taking part need to have a tight focus otherwise it's easy to become overwhelmed. The conversations at the end of the observation are where the real learning begins. You will be reassured to see that everyone has similar problems and no doubt find the different and individual methods people adopt to manage them fascinating. Coaching may help you put things into practice so that your observation of others has an impact.

Whatever you do, make sure it makes a difference; that you improve.

Monitoring

You need to discuss with your reviewer how your progress will be monitored. Data and lesson observations will be useful, but they can only provide part of the picture and won't be suitable for all objectives. For instance, an objective about managing your workload would be better discussed after recording how long you're spending on different aspects of your role. If you're trying to cope better with stress you need to look at how you're handling difficult situations and reducing the causes. Regular discussions will be the best way to monitor progress.

Have you got a Professional Development Portfolio? Teachers need some way of storing all their PM and professional development related paperwork together, such as in an email folder, paper folder or both. All objectives, actions plans, reflections and assessments should be stored here so that you can utilise them throughout your career. It will also aid keeping a record of what you've done and achieved and help when analysing your impact.

Being observed

Now that there is a limit of three hours' worth of lesson observation in any year, it's important to get the most out of it. Most teachers feel uncomfortable when being observed. One way of coping with nerves is to understand why you feel uncomfortable or worried; you can then do something about it. You'll feel better if you're completely prepared so plan with even more care than usual. Be absolutely clear about what you want to show: the progress you've made and the resultant impact on pupils. Have a copy of the lesson plan ready for the observer.

Don't panic if things start to go wrong. Most teachers have some lessons that go well, others that are okay and the occasional disasters. There are many factors that can influence you and how you perform, and even more related to the class you're teaching, such as how individual pupils are feeling etc. But whatever your performance ensure that you have a constructive discussion with your reviewer afterwards.

Reviewing progress

You will be asked to discuss your progress at the end of the PM cycle.

The illustrated example later in this document of how this discussion might be structured may help.

What I have done

Prepare well for this by having records of what you did. Don't forget to include any unplanned actions as new ideas and strategies can arise at anytime. If things haven't gone to plan, or had the intended impact, analyse why. Whatever the reason, learn from the experience for the future so that you can develop into the best teacher possible.

How I know I've made progress towards an objective

Reflect not just on whether you have met the objective but on how far you met it. Most importantly, have evidence of what has improved, and its impact. Analysing why some things worked better for you than others is important in helping you make the best professional development choices in the future; we are all different and learn in different ways. However, it's not always easy to know exactly what helped, because of the complexity of learning and teaching, and development can be gradual and is not always straightforward. That's where your reviewer's knowledge of your work and overview of your progress will help.

What if my objectives have not been met?

One of the key changes contained in the revised PM regulations is that teachers cannot be held responsible if the individual professional support agreed at the beginning of the cycle is not forthcoming. Remember, this does not just apply to formal courses, it could also include agreed coaching and mentoring, additional assistance in the classroom, ICT training and sharing good classroom practice, for instance. Your school's CPD co-ordinator will be able to offer guidance about the most appropriate form of CPD provision. Indeed, they will be provided with the CPD section of all agreed planning meeting reports. **Most importantly, as soon as you have any concerns about the conduct of any aspect of your PM please contact ATL (see 'further advice and support' below).**

Next steps

If your objective is fully met there may be nothing more to do in this area. However, most development needs a bit of attention in order for it to be sustained and it may be that although you've made progress you now want to make more. Discuss your priorities with your reviewer.

Illustrated example

Objective: To manage stress more effectively

What I have done:

- as a result of the coaching received, I am better at setting myself more realistic targets and rewarding myself when I meet them;
- my own health and wellbeing have been improved by walking one kilometre a day, going to an exercise class once a week and mainly drinking water at school instead of coffee;
- I make lists of what needs to be done, with time allocations;
- I spend fewer hours at school, but use them more efficiently;
- I use my diary to timetable deadlines for tasks and I use PPA time more productively;
- I deal more calmly with behaviour issues in the classroom, and spend less time on them.

How I know I manage stress more effectively:

- I'm less tired and my blood pressure has gone down (from 150/95 to 135/80);
- pupils and colleagues say that I appear happier.

Next steps:

- although I try to distance myself, pupils' out-of-school problems still worry me;
- I think I'm in a good position to help others manage their stress.

Conclusion

Used intelligently and creatively, PM should be an ongoing professional conversation. PM should provide you with the chance to reflect, celebrate achievements, solve problems and move forward. Make it work for you by investing in yourself. If you do thousands of children and young people will benefit as well as you.

The revised PM system that comes into effect in September 2007 will affect all teachers and headteachers in schools, Pupil Referral Units, and those centrally employed by local authorities (LAs). It will support teachers' continued professional development, with the revised standards for teachers providing a backdrop, and will help to secure better outcomes for pupils.

Commenting on the new PM system, Dr Mary Bousted, ATL general secretary, said:

"The revised performance management arrangements are another building block to a confident, empowered teaching profession. One of the most important aspects of the revised arrangements is the emphasis on effective CPD provision which is tailored both to the needs of the school and to the professional development of the individual teacher".

In this publication, Sara Bubb, provides her own advice about how you as a teacher can make the revised PM system work for you. ATL wants you to succeed and we hope that this publication gives you some very practical tips about how to do so. A wide range of further advice and support is available to you.

Further information

This guide should be read alongside the following:

- *Performance management: Guidance for ATL representatives* (ATL product code PM1), that has been sent to all school representatives with the advice and support they need to enable them to consult with your school management about both the school PM policy and the lesson observation protocol required by the revised PM system.
- *ATL Education and training programme: January to September 2007* (ATL product code TM1), that sets out the training courses available to members to enhance their skills and support their professional development. For further information about ATL training courses please email the training department at: training@atl.org.uk.

Both publications can be ordered by calling our publications despatch line on the following number: 0845 4500 009. We are also continually updating our resources on the ATL website at: www.atl.org.uk.

The revised PM regulations and guidance are also available on the Teachernet website at: www.teachernet.gov.uk. The Training and Development Agency for Schools is supporting implementation and will be providing workshops this term and guidance and other support for schools, governors and LAs throughout the current school year.

Additional support

There are a range of key contacts at ATL who are available to provide you with further advice and guidance, both to help you to succeed, but also to support you if you are concerned that the outcomes of PM may not be positive for you. Should this be the case the sooner you contact ATL the more effectively we will be able to support you.

Your school representative should always be your first point of contact, in particular if you are concerned about the operation of any aspect of your school's PM policy and lesson observation protocol. School representatives have all been sent the revised regulations and supplementary ATL guidance for representatives. If there is not an ATL representative in your school then you should contact your **local branch secretary** who will be able to provide you with similar advice. If neither of these are able to help contact ATL on 020 7930 6441.

ATL also now has a network of over 100 **ULRs** working in schools and colleges to help improve INSET days, as well as in branches to organise learning events, ensuring equal access to work and non work related learning for ATL members. ULRs are trained and accredited by ATL to:

- promote professional development, lifelong learning and training in schools;
- speak to you confidentially, one-to-one, about your professional development and lifelong learning needs;
- provide information and guidance about learning opportunities, including CPD, ICT and lifelong learning courses;
- form partnerships with employers and other unions;
- organise learning and training events in schools by distributing information and identifying local resources.

To find out if there is a ULR near you, please email us at: ulr@atl.org.uk.

Most importantly, remember you are not alone. As well as the ATL support outlined above, don't forget the support available within your own school, ranging from your reviewer, to your school CPD co-ordinator to your own colleagues.

ATL. The education union – led by education professionals from across the sector and throughout the UK.

ATL recognises the link between education policy and our members' conditions of employment. Our evidence-based policy-making enables us to campaign and negotiate from a position of strength. We champion good practice and achieve better working lives for our members.

We help our members, as their careers develop, through first-rate research, advice, information and legal support.

Our 160,000 members – teachers, lecturers, headteachers and support staff – are empowered to get active locally and nationally. We are affiliated to the TUC, and work with government and employers by lobbying and through social partnership.

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