ATL’s guide to Work-life balance
for teachers in independent schools
Introduction

Good schools provide a conducive environment for pupil development; pupils in good schools are stimulated by learning and encouraged to fulfil their potential; good schools are happy schools.

However, modern pressures and the perpetual drive to do more have turned some schools into exam factories, characterised by anxious pupils and stressed, overworked staff.

Working hard and achieving is important in maximising personal fulfilment. However, overwork is as unhealthy for the staff as it is for the pupils.

Work-life balance is an equilibrium between the needs of the school and the needs of staff. Schools operate on flexibility and goodwill. Staff regularly perform additional duties or work late for the benefit of the pupils and the school. A good school recognises this and shows reciprocal flexibility to staff.

While of course the primary purpose of a school is to provide the best education to the pupils, employers also have responsibilities to their staff to provide a safe and healthy workplace, including mental health. But it is not just about the employer's legal obligations to their employees – work-life balance benefits all.

ATL, as the largest and most respected professional association in the independent sector, knows from experience how much benefit work-life policies in schools can bring. We aim to raise the profile of work-life balance issues in the independent sector through campaigns and surveys on things like pay and conditions. We provide training on work-life balance issues on our independent school reps training course and at ATL's annual independent schools conference, and we provide legal advice and support to members on individual and collective issues.

ATL's Work-life balance toolkit for teachers working in the independent sector was designed to give you advice and practical tools to help you initiate the discussion on work-life balance in your school. Remember that you do not have to have all the answers – no one does. The important thing is to recognise the issue, initiate the discussion and tackle it collectively with fellow ATL members, other colleagues and management.
Why schools should address work-life balance

If you ask an ATL member working in an independent school what his or her main concern is, the most likely answer you will get is workload. Of course, there are many benefits to working in the sector. However, the expectation to do more and to work longer can affect morale and therefore effectiveness.

The creation of this toolkit partly grew out of a survey of ATL members working in independent schools, which found that:

- 85% have excessive workloads which result in a detrimental impact on their home life
- 60% work more than 50 hours a week
- 35% said their excessive workload leaves them feeling exhausted and stressed on a daily basis
- 30% have no time for a social life
- 64% are expected to perform administrative tasks they feel do not need to be carried out by a teacher.

Teaching is a very demanding job with a high level of responsibility. Excessive workload can lead to dangerous levels of stress, which in turn can adversely affect professional judgement and pupil care. One wrongly judged action could have significant consequences for the pupil and the teacher. And every teacher can think of a colleague who suddenly disappeared from the staffroom due to stress. Members are often left with the nagging doubt: ‘Was there something I could have done?’

While these statements may be true in their own right, a long summer holiday or beautiful location won’t do you any good if you have a nervous breakdown at school. Nor will they compensate for a failed relationship due to the hours you put in.

As ATL members, you can do something about it.

The first step is recognising that work-life balance is an issue for both employers and employees.

The second step is recognising that the solution will be different for everyone. Work-life balance policies need not be expensive for employers, and consultation (see page 14) should allow for imaginative and productive alliances in looking at the issues.

The third step is finding solutions that are appropriate for your school. We all lead busy lives and sometimes it is hard to see beyond your immediate duties. Overcoming that initial hurdle can often be the hardest part.

The advice and practical tools, such as the surveys, in this toolkit are designed to help you take those steps to positively affect your working life and those of your colleagues.
The benefits of work-life balance policies

**BENEFITS FOR YOUR SCHOOL:**

- Productivity – greater loyalty
- Efficiency – greater energy
- Motivation – empowering
- Recruitment – ‘first choice’ employer
- Retention – the best of staff
- Training – engaged workforce
- Reduced absence
- Greater flexibility

**BENEFITS FOR MEMBERS:**

- Responsibility and ownership
- Feeling valued
- Relationships at work and home improved
- Improved self-esteem
- Improved confidence and concentration
- Greater control
- Balance in ‘whole life’
ATL’s principles for addressing workload

- A reasonable balance between teachers’ working and private lives should be a joint objective of teachers and schools. ATL members and schools should maximise the flexibility for teachers to maintain a healthy balance between the demands of their profession and their lives outside school.

- Teachers’ time is a valuable and expensive resource. Many tasks and duties presently asked of teachers in independent schools can be an ineffective use of that time.

- The state sector workload agreement is a useful starting point for discussion in your school but it will not be relevant in its entirety. Independent schools may have different priorities and resources. Teachers will have different workloads and duties, and may be managed in a different way.

- ATL does not believe that a single framework is possible for the sector. Schools and teachers need to develop their own approaches and solutions.

- There should be meaningful consultation, in good time, with all relevant information provided. Ongoing professional dialogue is vital for this to happen, and in some schools this will require creating a forum and/or a procedure for discussion.

- Management and staff should discuss workload in formal consultative settings. Staff should feel the senior leadership team (SLT) is committed to reviewing workload, identifying new ways of doing things, and eliminating unnecessary or low priority tasks, particularly when new demands are being made.

- Staff should be able to raise workload issues with their managers and feel confident that their concerns will be addressed constructively.

- All staff should have regular support and progress meetings with their line manager, at which they have the opportunity to raise workload issues.

- All staff should have access to training and professional development to help them carry out their roles efficiently and to develop their skills and knowledge.

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Teachers need rest periods for their own well-being, as well as to refresh in order to provide the best teaching and care to the pupils.

- Parental expectations and the need to maintain competitiveness are valid concerns for schools. However, overwork and work that undermines teachers’ sense of professionalism and autonomy are equally valid.

- Schools should set an example to the pupils that there is a balance in life of working hard and having time to enjoy other pursuits.

- Planning and assessment time are key requirements for teachers. A teacher in a senior school should be allocated no less than 20% of the timetable to fulfil this work. In junior schools, the proportion should not be less than 10%, and part-time teachers should receive proportionate non-contact time. If present entitlements are currently greater than these recommended minimums, these should be maintained.

- Breaks are as important for teachers as they are for pupils. Teachers need rest periods for their own well-being, as well as to refresh in order to provide the best teaching and care to the pupils. It is not healthy for teachers, or any other staff, to be regularly working in their breaks and especially not their lunch hour.

- Every teacher should have a lunch break of a minimum of 40 minutes. Every teacher should have a mid-morning break and, depending on the length of the teaching afternoon, a mid-afternoon break. While there will be occasions when this is not possible, working through breaks should not be the norm.

- Change may take time. In many schools, a substantial increase in resources for additional teaching may be unrealistic. Therefore, we initially need to address workload issues by looking imaginatively at different ways of working, and whether all the tasks required of teachers need to be done by teachers or done at all.

- Lastly, with the best will in the world, workload is an ongoing issue and mechanisms need to be put in place to ensure that it is continually monitored.
One of the disadvantages of working in the independent sector is the long working day. In most jobs or occupations, the number of hours the employee is expected to work is defined in the contract of employment. This is true of the state maintained sector. It is also true for most support staff in the independent sector. Unfortunately, for teachers working in independent schools, hours of work are unspecified, vague, or there is a contractual catch-all clause along the lines of ‘whatever hours the head considers reasonable for carrying out your duties’.

To compound matters, there is often an unwritten expectation that teaching staff in independent schools will undertake numerous extra-curricular activities and lunchtime duties. And, of course, then there are boarding schools.

So if your contract of employment is silent on working hours, your rights and responsibilities may have been set by custom and practice. This may enable you to challenge the introduction of new duties that make unreasonable demands on your time.

As an absolute minimum, there are legal limits to the number of hours that can reasonably be worked as well as legally specified rest breaks.

The Working Time Regulations 1998

The primary purpose of the Working Time Regulations is to safeguard the health and safety of employees by legislating against employers obliging employees to work excessive hours. The regulations cover England and Wales. Similar legislation is in place in Scotland and Northern Ireland and, though there are some differences, the broad principles of the legislation are the same.
Accordingly, Dr Jaeger was entitled to compensatory periods of time off immediately following the period he spent on call. This has been followed in the UK by the 2005 case of Anderson v. Jarvis Hotels plc and the 2010 case of South Manchester Abbeyfield Society Limited v. Hopkins.

Therefore, all time spent at work, including time spent on call, has to be taken into account in deciding whether the working week exceeds the maximum laid down in the Working Time Regulations.

However, where someone is on call but is not required on the premises, the hours on call are not counted.

On call hours are also important in establishing breaches of the national minimum wage. ATL has brought a number of successful cases on behalf of house parents in boarding schools against independent sector employers who are paying less than the national minimum wage. It should be noted that such national minimum wage cases are usually only relevant to support staff house parents, who earn appreciably less than teachers.

In the case of the weekly working hours’ limits, individual agreements are possible between worker and employer excluding the standard 48-hour limit. These agreements will have to be in writing and contain a notice clause. The employer in these cases is not obliged to keep records of hours actually worked by the individuals concerned. No detriment can be imposed on employees who refuse to sign a working hours agreement. It is unlikely that you will be asked to sign such a waiver. If you are, you should seek advice from ATL (tel: 020 7930 6441).

**Rest breaks**

Most workers are entitled to an uninterrupted rest break of at least 20 minutes away from the workstation during the working day if it exceeds six hours. The break should be given during the middle of the period and not at the beginning or end.

ATL recommends a minimum uninterrupted lunch break of 40 minutes. ATL also recommends that teachers have a mid-morning break and, depending on the length of the afternoon teaching timetable, a mid-afternoon break.

**Daily rest period**

Most workers have a right to a daily rest period of at least 11 consecutive hours in each 24.

**Weekly rest period**

Employers must provide a minimum weekly rest period of at least 24 hours in each seven-day period for most workers, although employers can opt for 14-day averaging. The rest period is not required to include Sunday.

**Annual leave**

Workers are entitled to 28 days of paid annual leave, though bank holidays are counted in this total.

**Night work**

Night workers’ hours are limited to eight hours in each 24-hour period, averaged over 17 weeks. A night worker is one who, as a normal course, works at least three hours of daily working time between 11pm and 6am.

**Record keeping**

Employers must keep ‘adequate’ records to show that the average weekly working time limits are being observed. Records must be kept for two years. Employers are only required to make occasional checks of workers who do standard hours and who are unlikely to reach the average 48-hour limit.

However, they should monitor the hours of workers who appear to be close to the working time limit, and make sure they do not work too many hours.
Partial exclusions

The legislation provides for some flexibility from the full rigour of the regulations, firstly to accommodate various sectors of employment and also to cover certain exceptional circumstances. The key ones are:

- residential institutions (such as boarding schools)
- foreseeable surges of activity
- unusual and unforeseeable circumstances beyond the control of the employer (including accidents).

In each of these cases, the worker is not entitled to the standard daily and weekly rest periods or to the daily rest break. However, he or she is ‘wherever possible’ to be allowed to take an ‘equivalent period of compensatory rest’. Significantly, in these cases the limits on working time (see above) will still apply.

Enforcement

As the regulations are essentially a health and safety measure, the working time (and night work) limits are enforced by the Health and Safety Executive. Employers who fail to comply could be prosecuted for committing a criminal offence.

Practical implications of the legislation

So what does it mean for employees working in independent schools? Despite some restrictions, the Working Time Regulations have significant implications for independent schools.

Working time

The restrictive definition of ‘working time’ and its averaging over 17 or 26 weeks (which will inevitably include some school or college holiday within the calculation) prevents most teachers and lecturers from benefiting. Although the employee can select the period to be looked at, the fact that the 48-hour limit is averaged in this way will mean that, during term time, teachers may work considerably longer than 48 hours per week without this contravening the regulations.

Nonetheless, some boarding schools where ‘on duty’ periods are especially onerous may be affected. Note that boarding schools are not exempted from the normal 48-hours averaged limit.

Rest and breaks

While residential institutions, such as boarding schools, are excluded from the normal requirements on rest and breaks, staff are ‘wherever possible’ entitled to claim ‘an equivalent period of compensatory rest’.

ATL believes that it is possible, and therefore a legal requirement, for the vast majority of independent schools to provide compensatory rest. ATL members in boarding schools have successfully negotiated compensatory rest to be taken in blocks of time, at a time convenient to the school.

It is not uncommon for teachers in boarding schools to have less than the legal daily rest period of at least 11 consecutive hours in each 24. This is something that the school must address.

Similarly, the flexibilities (see above) for ‘surges of activity’ and ‘unforeseeable circumstances’ are likely to apply to events such as school trips where short periods of unusually long working hours are required. Again, in these cases, compensatory rest should be given.

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Workload in the maintained sector

Working together with teachers, unions, managers and employers, the government sought to identify positive ways to tackle teachers’ excessive workload in the maintained sector, and to give a better work-life balance. The result was the Workload Agreement, which was implemented in 2003.

In 2009, the agreement was extended to include a provision that teachers would only be required to ‘rarely cover’ for colleagues. This means that teachers in the state sector can only be expected to cover in exceptional circumstances, where cover could not have been arranged. Teachers are not required to cover for absent colleagues where it is a planned absence or an absence that could be foreseen.

Academies and free schools may deviate from the agreement if they wish, although at the time of writing it would appear that the vast majority see the benefits of the agreement to both the employee and the employer, and continue to implement it.

The Workload Agreement

The Workload Agreement states that teachers in the maintained sector should have:

- a reasonable work-life balance (with headteachers responsible for ensuring this)
- a timetable that provides reasonable allocation of time in support of their leadership and management responsibilities
- a guaranteed minimum 10% of their timetabled teaching to be used as preparation, planning and assessment time during the school day
- only to ‘rarely cover’, ie teachers should only be expected to cover in exceptional circumstances, eg for unforeseeable events, and not for planned absences or absences that could be foreseen.

A major part of addressing workload has been the greater involvement of support staff in the delivery of education. In recent years, there has been greater scrutiny of the most efficient use of resources and recognition of the additional skills that support staff can bring.

There has also been an acknowledgement that carrying out routine administrative tasks may not be the best possible use of a teacher’s time. This has been quantified into a list of 21 administrative tasks that teachers in the state sector should not routinely be required to undertake, as set out on page 10.

You may wish to use the questionnaire on the 21 tasks (see page 21 and included in your toolkit folder) to survey your school and to initiate the discussion on the most efficient use of resources.
21 administrative tasks teachers in the maintained sector should not routinely be required to undertake

- Collecting money from pupils and parents; a designated member of the office staff should be responsible for receiving and recording money.
- Investigating a pupil’s absence; teachers will need to inform the relevant member of staff when a pupil is absent from a class, but they should not have to telephone the pupil’s home, for example.
- Bulk photocopying, eg for the use of the whole class.
- Typing or making word-processed versions of manuscript material and producing revisions of such versions.
- Word processing, copying and distributing bulk communications, including standard letters, to parents and pupils.
- Producing class lists on the basis of information provided by teachers; teachers may need to be involved in allocating pupils to particular classes.
- Keeping and filling records including records based on data supplied by teachers; teachers may be required to contribute to the content of the records.
- Preparing, setting up and taking down classroom displays. Teachers will still make decisions about what material should be displayed in their classrooms.
- Producing analyses of attendance figures.
- Producing analyses of examination results.
- Collating pupil reports.
- Administration of work experience; teachers may still need to select placements and support pupils through advice or visits.
- Administration of public and internal exams.
- Administration of cover for absent colleagues.
- Ordering, setting up and maintaining ICT equipment and software.
- Ordering supplies and equipment.
- Cataloguing, preparing, issuing and maintaining materials and stocktaking the same.
- Taking verbatim notes or producing formal minutes of meetings; teachers may be required to coordinate action points if necessary.
- Coordinating and submitting bids (for funding, school status, etc) using contributions by teachers and others.
- Transferring manual data about pupils into computerised school management systems (teachers should not be expected to input initial data electronically).
- Managing the data in school management systems.

The Workload Agreement is clearly a useful benchmark for teachers working in the private sector and one that independent schools are already using in their discussions of tackling excessive teacher workload. At its core is the promotion of best teaching practice and efficient management of resources, which can only be of benefit to schools.
Tackling work-life balance in your school

When you are very busy it can often seem impossible to see beyond the next task. However, sometimes tackling workload in schools just needs someone to start the ball rolling. Overcoming this initial hump is often the hardest thing to do.

Many ATL reps and members have taken the lead in tackling work-life balance in their schools with great success. You and your colleagues will know what works best in your school, and what is practically possible. You don’t need to know all the answers to start asking questions.

For a quick summary of activities you and colleagues might want to consider, have a look at the following checklist of actions, many of which will be explained in more detail throughout the toolkit.

Checklist

✓ If you are the school rep or contact, consider calling a members’ meeting to discuss the subject

✓ If there is no ATL rep or contact in your school, decide who can take on the role and email membership@atl.org.uk to let them know. For help in arranging meetings and electing reps, ATL have an organising team who can be contacted via email at organise@atl.org.uk.

✓ Put up the posters contained in this toolkit on your notice board and display them in your staffroom.

✓ Use the post-it notes in the toolkit to advise colleagues of where they can get further support and advice on workload.

✓ Use the surveys to identify and quantify the issues.

✓ Share the results with colleagues.

✓ Find out about other ATL resources, including advice guides and model policies, which might be helpful. Go to www.atl.org.uk for general information or, for advice specific to the independent sector, go to www.atl.org.uk/independentrep.

✓ Consider what professional development might be needed in tackling the issues. Use the learning needs survey (page 21) and contact your ATL union learning rep, or consider becoming one yourself (see page 14).

✓ Build relationships with your headteacher and SLT – use the arguments in pages 2 to 3 to persuade them of the value in having a policy. ATL can support your school in developing policy. There is helpful guidance in ATL’s Working in the Independent Sector, which members can order free of charge via the website. Or if you would like assistance with a policy or procedure, contact ATL’s London office on 020 7930 6441 or via info@atl.org.uk.

✓ Consultation is key to success in tackling workload issues – see page 14 for more on how to consult.

✓ Hunt down information and examples of best practice from other independent schools, particularly those that are similar to your school. These may carry weight with your head or SLT and can be helpful in figuring out solutions. See pages 12-13 for some examples. You could also make contact with other ATL reps and members in your area. For further information, contact ATL’s national official for the independent sector at the London office, tel 020 7930 6441.

✓ Encourage colleagues to join ATL – the more ATL members there are in your school, the stronger the voice you will have. The easiest way to join is online at www.atl.org.uk/join.

Further advice and assistance can be obtained by contacting the London office or by emailing organise@atl.org.uk.
A workload agreement

In this group of well-known independent schools, ATL members negotiated a workload agreement with the employer. The agreement acknowledged the importance of work-life balance and backed up the sentiment by providing additional resources to address the specific issues identified across the schools. The agreement set out key principles for assessing workload and the actions that would be taken at school level.

Initially, the schools prioritised the following areas: pupil registration; pupil assessment and reports; school trips; cover for absent colleagues and exam invigilation. More resources and administrative support were provided.

It was also acknowledged that the pressure of modern-day education means that workload will always be a potential problem. Consequently, workload was added as a standing agenda item for each school’s consultative committee. In this forum, management and staff collectively reviewed all aspects of work.

Workload was also addressed on an individual level, with teachers reviewing their duties and workload with their line managers in their annual reviews.

SLT looks at ‘21 tasks’

ATL members at a large day/boarding school used the first edition of the ATL toolkit to see if teachers’ time could be more productively used by reviewing administrative tasks. Managers responded positively to the initiative and the SLT asked the chairman of the common room to survey teachers about the 21 clerical and administrative tasks using ATL’s survey.

Teachers were asked: which tasks they routinely undertook; whether it was part of a responsibility agreed by the headteacher; whether they considered it to fall within their professional duties; and whether they felt the task could appropriately be passed to someone else. A report was considered by the SLT and additional clerical support was introduced.
A later start
ATL members at this girls’ boarding school raised the issue of work-life balance with their head and, more specifically, returning home late from educational visits. The head was sympathetic to their concerns. It was agreed the trips were an integral part of the pupils’ learning experience and the teachers wanted to provide them. However, it was acknowledged that working the additional hours did leave teachers tired the next day. The head agreed that a system be put in place which allows them to come in later the next day.

Compensatory reduction
At a well-known boarding school, ATL members successfully made the case to the SLT that when asking masters to do something new, such as a Saturday evening duty, they must now offer a compensating reduction in their workload elsewhere. This was in recognition that it is easy to get carried away with an innovative idea that will benefit pupils but, as with any decision, there also needs to be consideration of the implications for staff time. The SLT are now tackling the real decisions of management – prioritising and balancing workload, not just endlessly adding to it!

Improved consultation
In one school ATL members felt a lack of consultation on changes to workload and working practices was creating unnecessary additional stress. Using the toolkit, members considered the advice on consultation and trade union recognition, and concluded that the level of consultation of staff in their school could be improved. Members unanimously agreed that a recognition agreement would help them plan change better and, in turn, help manage their workloads better. Involving other colleagues and managers, they set up a voluntary recognition agreement so that meaningful consultation was carried out in good time, allowing staff input into decision-making.

Designated time for planning, preparation and assessment
ATL members at this prep school in Lancashire discussed workload issues, using the ATL workload survey to get things going. The toolkit was taken to a series of senior management meetings by the key stage 1 curriculum leader and ATL member. As a result all staff were granted planning, preparation and assessment time. This has led to an enhanced spirit of cooperation and togetherness.
Union-led learning with ATL

Many work-life balance issues can be addressed partly through training and development. It stands to reason that if you are doing something new without training, it is likely to take you longer than if you had been shown the best way to do it. This clearly has implications for your workload. The toolkit’s learning needs survey is a good place to start looking at what training might enable you to do your job more efficiently. It provides a snapshot of both individual and collective learning needs in your workplace.

As the education union, ATL is committed to helping its members develop through the course of their careers. This is why members can access a comprehensive range of continuing professional development (CPD) courses and reps courses through ATL, which are free to all members.

Alongside our CPD programme, there is a range of courses for school and college reps, health and safety reps and union learning reps. If you’re our school rep or contact, then you should consider going on ATL’s ‘Being Our Independent School Rep’ course, which will build your confidence and show you all the support available to ATL members. To find out more about these courses, please see the ATL website at www.atl.org.uk.

In addition to the training courses we provide, ATL has a national network of union learning reps. ULRs are members who volunteer to work with staff and employers on new lifelong-learning and professional development opportunities.

ATL ULRs are leading the way in independent sector schools and establishing new partnerships to support CPD and lifelong-learning in the workplace. They make a difference to the availability, quality and range of professional development programmes on offer in schools.

As a trade union and professional association, we believe that the best results are always achieved collectively

Working in partnership with CPD coordinators and headteachers, ULRs help assess learning needs, provide information and advice, and support learning.

ATL provides free training for ULRs. It can be an interesting and rewarding aspect to your working life. If you are interested in finding out about becoming a ULR, please contact organise@atl.org.uk.

Collective action and consultation

As a trade union and professional association, we believe that the best results are always achieved collectively. And nowhere more so than in schools or colleges, which prosper with a collegiate atmosphere.

Acting collectively gives strength and confidence to school staff and it prevents an employer dismissing the issue as being important to just one person. The more people in ATL who speak with one voice, the more legitimacy and influence arguments will have with headteachers and governors.

Information-sharing, meetings and consultation are all key to achieving collective action. This means colleagues consulting colleagues but also management consulting staff. Unfortunately, consultation can be on an ad hoc basis in independent schools. Some managers may even see it as a threat. However, we believe it is a crucial step in addressing workload. Involving staff in decision-making makes them feel valued and gives staff a sense of ownership of decisions.

Stress can often be caused by feeling powerless to influence things and having change imposed upon you. This can exacerbate workload problems and our sense of our ability to cope.
Consultation allows staff to discuss the practical considerations in making something happen. While it is important to review ways of doing things, and to welcome innovative ideas, the resource implications always need to be assessed. You cannot simply pile on one duty after another. Good consultation enables work to be planned.

Most independent schools have some forum for collective consultation, which hopefully provides the opportunity for staff to raise workload and work-life balance issues.

**Employers and consultation**

Some employers confuse consultation with the conveying of information. Consultation should always be meaningful and two-way. An employer should:

- provide the necessary information for staff to make informed decisions
- allow a reasonable time scale to consider proposals
- provide the necessary facilities to consider proposals, such as time for staffroom or union meetings
- consider staff suggestions.

If this does not happen then ATL members should consider how to set up an appropriate forum so that the staff voice is heard. Without this it is unlikely that workload issues will ever be properly addressed.

**How employees can consult**

Consider the following steps:

- organise an ATL member/open meeting to discuss work-life balance issues
- raise the issue at the regular common room meeting
- request a meeting between the ATL school rep/chair of common room/other key staff and management
- use the surveys and short questionnaires in the toolkit to collect members’ views and issues (see page 21)
- have informal discussions in the workplace or brainstorming sessions, maybe during coffee breaks or lunch periods
- formally raise the issues at your school joint negotiating committee, joint consultative committee or other relevant staff committee
- if there is no form of staff/management committee, consider asking for one.

It is for staff and management to decide what structure will work best for your school. ATL supports members in whatever decision you reach as to what works best for you. In general, however, ATL believes that trade union recognition is in the best interests of the staff and the school, and is the most effective way to tackle work-life balance and other issues that impact on members’ working lives.
Trade union recognition

Trade union recognition has many advantages to both employers and employees. An agreement helps provide clarity on what will be consulted on, when and how.

As and when appropriate, it enables ATL to share our expertise in policy and procedure in both the state and independent sector for the benefit of the staff and the school. Some independent school employers will hire HR consultants at great expense to help develop policy and procedure. ATL can provide expert advice and model policies to our members for the benefit of the school. We can advise on the pitfalls associated with introducing or not introducing policy.

Recognition provides the forum to assist in many areas that impact on workload, eg developing things such as family-friendly policies. It also helps forward planning of work, collaborative working and shared ownership of decisions.

The right of staff to be collectively represented by a union or unions of their choice is a statutory right, provided a majority of the staff are in support and certain criteria are met. It is not in the gift of the employer. However, as the purpose of recognition is to improve communication and joint working, ATL strongly recommends that members seek an amicable voluntary agreement with the school. Of over 80 independent schools that currently recognise ATL, only two forced our members to take the statutory route.

Voluntary recognition

Under a voluntary recognition agreement, the two parties agree the areas to be covered by collective bargaining and consultation. This allows the agreement to be tailored to best suit the needs of the school and its culture, and enables both staff and management to influence how it will work.

ATL recommends that staff are consulted on their general terms and conditions of employment, including:

- any changes to existing or revised contracts, policies and procedures (eg pay policy, capability, discipline and grievance procedures)
- physical working conditions, including health and safety
- allocation of work or duties
- trade union membership and facilities for accredited representatives
- arrangements for staff training and development, including mentoring and appraisal arrangements
- workload, including bureaucracy issues.

Recognition provides the forum to assist in many areas that impact on workload
Practical considerations

There are some practical considerations when deciding whether to seek trade union recognition and on behalf of whom. ATL membership has fairly recently been opened to all staff working in independent educational establishments. While our support staff membership is growing, the majority of our members remain teachers. Therefore, if the employer is likely to oppose recognition, then practical consideration needs to be given as to where the strength of the membership lies.

Members need to gauge the strength of support amongst all staff and assess the relative strength of ATL membership for both teaching and support staff. Currently, roughly half of ATL’s recognition agreements in the independent sector cover all staff and the other half cover just teachers.

For example, it may be felt that recognition for the teaching staff should be sought in the first instance, with a view to returning to the question of a whole-school workforce agreement at a later date, when ATL membership numbers amongst support staff have increased and the benefits to the school have been demonstrated.

Members also need to consider whether they wish to seek joint union recognition with another union which has a significant presence at the school.

Statutory recognition

A union is entitled to seek statutory recognition for a group of workers where at least 10% of the group are members of the union. A statutory tribunal, known as the Central Arbitration Committee, considers the application from the union and any representations from the employer.

If the union has 50% of the group of workers in membership, the tribunal normally awards recognition automatically. Where it does not, or where there is uncertainty as to whether those members wish their union to be recognised, the tribunal might order a ballot of the group of workers. If a majority of the group votes in favour of recognition, and that majority constitutes at least 40% of the group, then recognition is awarded.

Under statutory recognition an employer must consult on pay, hours and holidays.
You could use the following bullet points to start an initial discussion with ATL members at your school.

**The advantages of a recognition agreement**
- Better communication
- Shared responsibility
- Improved quality of decisions
- Fewer misunderstandings
- Staff involved in decision-making
- Better morale
- Improved goodwill and mutual respect
- Open and frank discussion
- Less conflict
- Improved contracts, policies and procedures
- Better change management
- Better crisis management

**Further help**
ATL can offer advice and support, as well as briefings, model letters to staff/head/governors and a model agreement. The model agreement can be modified to reflect what best suits your school.

If you are interested in exploring recognition further, please contact ATL’s London office on 020 7930 6441, or email info@atl.org.uk.

**Under statutory recognition an employer must consult on pay, hours and holidays**
How you can help yourself

While ATL believes that most workload issues are collective and should be addressed as such, there are some things that can be addressed on an individual basis.

Some of the following useful suggestions come from Managing Teacher Workload by Sara Bubb and Peter Earley of the Institute of Education (Paul Chapman Publishing, 2004).

Quality time
It is important to recognise that different individuals are more productive at certain parts of the day. For the majority of people, this time is early in the day, when they are freshest.

It’s been suggested that about 20% of our time is prime time, and that, used correctly, it should produce about 80% of our most creative and productive work. The rest of our time is likely to be of lower quality, and is nowhere near as productive.

Our creative thinking, and our most difficult jobs, deserve some of our high quality time. For example, important decisions need people’s prime time, not the traditional slot of low quality time at the end of the teaching day. As a consequence, it’s becoming more common now for schools and colleges to timetable team meetings earlier in the day.

In low quality time, we should plan to do things that are easy to pick up after interruptions, eg do simple jobs like photocopying (if you haven’t delegated them) before you leave for the day rather than at the start of the next, when you’re at your freshest.

Procrastination
It also helps to be more aware of how we use our own time. Procrastination is a common time waster.

If we can recognise the problem in ourselves we can begin to eradicate or at least reduce its baleful influence.

If you are in any doubt that you might, on occasion, suffer from procrastination, you should complete the procrastination questionnaire (see page 22 and the forms in your toolkit). If you are a procrastinator, then there are a number of things that might help, such as:

• avoid distractions – talking to colleagues, making tea, etc
• use the ‘one hour’ rule; when sat at a desk rather than teaching, decide not to get up for one hour and only then have a short break
• break large tasks into smaller ones
• give yourself rewards
• tackle the most unpleasant task first
• consider what would happen if you don’t do the task.

Prioritising
One way in which we can improve our time management is to review the way in which we organise tasks. Prioritising is something most of us do without even thinking. However, it can be useful to think again about how you do this when reviewing your workload.

Try listing your jobs in the order of priority in a ‘to do’ list. You could ask the following questions:

• what is the purpose of the job?
• what are the measures of success?
• what are the priorities?
• what resources are available?
‘To do’ lists

‘To do’ lists are useful because they consolidate all the jobs that you have to do into one place. When you have developed a ‘to do’ list, it may make you re-visit your priorities and change the order of importance. In addition, when problems can seem overwhelming, the simple process of putting them in a list helps to give you back some control.

When preparing a ‘to do’ list, write down the tasks that face you and, if they are large, break them down into smaller elements. If these still seem large, break them down again, and do this until you have listed everything that you have to do.

Once you have done this, run through the jobs listed, allocating priorities from very important to unimportant. If too many tasks have a high priority, run through the list again and demote the less important ones. When you have done this, rewrite the list in priority order. If you run up against a deadline for a task on the list, re-prioritise it.

It’s been suggested that about 20% of our time is prime time, and that, used correctly, it should produce about 80% of our most creative and productive work

Attending meetings

Meetings can be notorious time wasters. Held on a routine basis – whether weekly, bi-monthly or monthly – they are often tedious and wasteful. A meeting should be held only when it is the best way to achieve an objective. Ask yourself and others involved:

• what do we want to achieve at this meeting?
• what do we want to achieve after the meeting is over?
• is the meeting necessary, or is it habit?
• what would happen if this meeting were not held?
• who is needed?
• are all of these people needed all of the time?
• could the meeting be held at a more convenient time?

Why not try out the ATL meeting assessor (see page 22 and the forms in your toolkit) to see if you really need to attend that meeting.
About the surveys and questionnaires

Using the surveys
The toolkit includes a number of surveys and questionnaires designed to help you and your colleagues take practical steps to address workload.

The surveys will help you, your colleagues and managers to identify and quantify the issues. Another advantage is that they enable all staff to participate and help avoid the problem being dismissed as a personal one. The surveys might also help to identify possible solutions. The ATL membership, or staff as a whole, taking part via the surveys also increases the sense of collective responsibility, rather than the onus being on the rep or other individual raising the issue.

If you want to resolve an issue then you have a far better chance of getting the buy-in of your manager if you can present a way forward and, even better, a solution.

So choose the surveys that are most relevant to the issues in your school. Photocopy and distribute them. Remember to include the details of where they are to be returned and provide a deadline.

Workload survey
The workload survey is a general questionnaire for staff covering various issues, giving scope for individuals to identify the areas of major concern.

This may be the survey that you wish to start with, if the issues are not immediately apparent or need to be quantified. It will encourage colleagues to look at what they do and what can be improved.

Common tasks routinely undertaken by teachers survey
This survey highlights the 21 administrative tasks that teachers in the maintained sector should not be routinely asked to do. It provides a useful benchmarking exercise for any independent school.

The 21 tasks survey also raises the question as to whether it is the most efficient use of a teacher’s time to carry out certain administrative tasks.

While certain jobs need to be done, it may be possible to do them more efficiently, freeing up resources/time to be used more productively elsewhere. It could also save the school money!

Learning needs survey
It is self evident that if we are not properly trained to perform certain tasks it is likely to take us considerably longer to do them. Training and personal development help to widen our skills, motivate good performance and can be used to address issues around work-life balance.

Use the learning needs survey to help identify the individual and collective training priorities in your school.

My working week form
An illuminating way to look at your own workload is to audit the amount of time you spend performing different tasks and duties during one working week. This will enable you to see how much work you are doing in addition to the school day and to monitor whether you are taking sufficient breaks.

Use this blank template to record details of your working life over a seven-day period. The aim is to identify how, when and where you allocate time before, during and after your working day.

Try to capture all the tasks you are required to perform including additional duties during breaks, lunch and after school.
For example, you may be required to cover playground duties during breaks or lunch, or be responsible for pastoral care after school.

At the end of each day reflect on the length of your working day, and when and where you undertook your duties. Are you spending too much time at home preparing reports for meetings? Are lunches and break times taken up with playground or other duties? Is the school timetabling lessons or revision classes in the lunch hour? Are commitments to after-school activities preventing you prepare and assess teaching and learning. The knock-on effect of these types of activities will impact on your work-life balance.

**Procrastination questionnaire**

Use this questionnaire to ask yourself if you are a procrastinator and, if so, how much of a problem it is. Though it might be treated as a more light-hearted survey, its results can make you think anew about how you tackle your own workload.

**ATL meeting assessor**

We all know meetings can take up a huge amount of time and many of us wonder if they are effective or even necessary. Use this assessor to help you and your colleagues think about what meetings you hold, when and why.

**Where to find forms and surveys**

The above forms and surveys have been included in your toolkit in black and white to enable easy photocopying. You can also download PDF versions at www.atl.org.uk/worklifebalanceindependent.

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**Drawing up an action plan**

The surveys and questionnaires are practical tools to help you identify and quantify the main work-life balance issues in your school.

Organise a meeting with colleagues to discuss the problem and their general views. This might be an ATL members-only meeting or an open ATL meeting (a good way to encourage non-members to join ATL).

Decide the best way forward. Is the SLT aware of the problem and open to discussing it? If so, the next step can be taken in conjunction with them. If not, the next step will be to assemble concrete evidence of staff concerns, with detail on the specific problem and, hopefully, ways it can be addressed.

Discuss the information with the SLT, prioritise the most important aspects, and hopefully reach an agreement on the action to be taken.

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**Need more help?**

ATL is always on hand to advise and provide support.

- If you would like assistance, please contact the London office on 020 7930 6441.
- Email the organising team at organise@atl.org.uk.
- There is also lots of useful information on the ATL website at www.atl.org.uk, where you will also be able to download or order ATL publications such as *Working in the Independent Sector*. 

Common tasks routinely undertaken by teachers

Please tick in column 1 the tasks you routinely undertake and column 2 the tasks which you feel could reasonably be carried out by another person. Column 3 is for your comments.

<table>
<thead>
<tr>
<th>Task</th>
<th>1</th>
<th>2</th>
<th>3: your comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Collecting money</td>
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<tr>
<td>2. Investigating absence</td>
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<td>3. Bulk photocopying</td>
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<td>4. Typing copies of manuscripts</td>
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<tr>
<td>5. Producing class lists</td>
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<td>6. Record keeping and filing</td>
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<td>7. Classroom display</td>
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<td>8. Analysing attendance</td>
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<td>9. Analysing exam results</td>
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<td>10. Collating pupil reports</td>
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<td>11. Administering work experience</td>
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<td>12. Administering school examinations</td>
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<td>13. Word-processing, copying &amp; distributing bulk communications</td>
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<td>14. Administering teacher cover</td>
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<tr>
<td>15. ICT trouble shooting and minor repairs</td>
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<td>16. Ordering supplies and equipment</td>
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<td>17. Stocktaking</td>
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<td>18. Minuting meetings</td>
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<td>19. Coordinating and submitting bids</td>
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<td>20. Inputting data into computerised systems</td>
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<td></td>
</tr>
<tr>
<td>21. Managing pupil data in computerised systems</td>
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</tbody>
</table>

PLEASE RETURN TO YOUR REP/CONTACT
Training and the opportunity to develop both personally and professionally is essential for the best performance of your role. Please take some time to complete this learning needs survey to help us establish what your training needs are.

**Name**

In the last two years what training opportunities have you had?

### What type of training opportunities would you like?

1. Subject-specific training
2. ICT skills
3. Leadership skills
4. Communication skills
5. Classroom-based skills
6. Pastoral skills
7. Other (please indicate)

### What stops you undertaking training?

1. Time
2. Cost
3. Lack of information
4. Lack of confidence
5. No management support
6. Childcare problems
7. Travel/location
8. Other

PLEASE RETURN TO YOUR REP/CONTACT

Details of ATL’s training and development courses are available at [www.atl.org.uk](http://www.atl.org.uk)
### My working week

<table>
<thead>
<tr>
<th></th>
<th>Before school</th>
<th>Morning break</th>
<th>Lunch</th>
<th>Afternoon break</th>
<th>After school</th>
<th>Other/comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Examples:</strong></td>
<td>7.30-8.30am Preparing report for staff meeting</td>
<td>10.30-10.50am Meeting with support staff/dept meetings</td>
<td>12.00-1.00pm Playground duty/lunch club</td>
<td>2.20-2.40pm Photocopying resources</td>
<td>3.30-5.30pm After-school clubs/staff meetings</td>
<td>7.30-9.30pm Planning/marketing/assessment/school events</td>
</tr>
<tr>
<td>Monday</td>
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<td>Tuesday</td>
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<td>Sunday</td>
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</tbody>
</table>
Procrastination

Sometimes we waste time procrastinating rather than getting on with the job. In order to assess yourself as a procrastinator, score yourself depending on how strongly you think these statements apply to you.

Do you:  strongly agree (4)  mildly agree (3)  mildly disagree (2)  strongly disagree (1)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I can always find a reason for not tackling a task that I don’t want to do.</td>
<td>4</td>
</tr>
<tr>
<td>2. I need an imminent deadline before I get on with such a task.</td>
<td>4</td>
</tr>
<tr>
<td>3. I put off tackling people if I think it’s going to be unpleasant.</td>
<td>4</td>
</tr>
<tr>
<td>4. There are too many interruptions and crises in teaching to allow me to accomplish anything that takes sustained effort.</td>
<td>4</td>
</tr>
<tr>
<td>5. I like to tidy everything up before I get to grips with a task.</td>
<td>4</td>
</tr>
<tr>
<td>6. When I know an unpopular decision has to be made, I tend to sit on the fence.</td>
<td>4</td>
</tr>
<tr>
<td>7. I try to get other people to do the parts of my job that I don’t like doing.</td>
<td>4</td>
</tr>
<tr>
<td>8. My non-contact time is rarely used for marking or preparation.</td>
<td>4</td>
</tr>
<tr>
<td>9. I am under too much pressure to deal with difficult tasks.</td>
<td>4</td>
</tr>
<tr>
<td>10. I often neglect to follow up what has been decided at a meeting.</td>
<td>4</td>
</tr>
</tbody>
</table>

Total score

Procrastination quotient scoring

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 20</td>
<td>You are not a procrastinator.</td>
</tr>
<tr>
<td>21 – 30</td>
<td>Although it is not a major problem, you do tend to put off tasks; paying some attention to this area should help you improve your time management.</td>
</tr>
<tr>
<td>30+</td>
<td>You have significant problems in procrastinating, and need to explore this further if you are to manage your time better.</td>
</tr>
</tbody>
</table>
A meeting should be held only when it is the best way to achieve an objective. Look for the basic reason for holding the meeting. Ask yourself and others involved:

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Partly</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Was the meeting necessary?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Were the objectives of the meeting clear?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Were the objectives of the meeting achieved?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Could the information have been imparted in a more efficient way?</td>
<td></td>
<td></td>
<td>Possibly</td>
</tr>
<tr>
<td>5. Did I need to be at the meeting?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. What percentage of the meeting was relevant to me?</td>
<td>All</td>
<td>Some</td>
<td>None</td>
</tr>
<tr>
<td>7. Could the meeting have been organised so that I attended only the part relevant to me?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Were all the other attendees needed all the time?</td>
<td></td>
<td></td>
<td>Possibly</td>
</tr>
<tr>
<td>9. Could the meeting have been shorter?</td>
<td></td>
<td></td>
<td>Possibly</td>
</tr>
<tr>
<td>10. If it is a regular meeting, could it be held less often?</td>
<td></td>
<td></td>
<td>Possibly</td>
</tr>
</tbody>
</table>

Record any comments and your next actions here:
Excessive workload and long hours are critical issues for most teachers in the independent sector. While there is never going to be a magic wand to change things overnight, a start can be made by looking at what work teachers do and identifying areas where improvements could be made. Please give as much detail as you can.

1. What percentage of your day do you spend on routine administrative tasks?

2. Are there routine administrative tasks that could be done by someone else?

3. If so, what are they?

4. How often do you provide cover and what notice are you given?

5. How often do you attend meetings?

6. Could some meetings be time limited, or not held at all?

7. How often do you write reports?

8. What pastoral work do you do and how often?

9. Do you invigilate external exams?

10. Please estimate the percentage of the timetable you have for planning, assessment and marking.

11. Is workload a standing item on the agenda of your school’s meetings?

12. Have you raised workload issues at school and, if so, what was the response?

13. What practical measure could the school introduce to assist with workload?

14. If you did have a magic wand what one thing would most assist your workload?

15. Finally, any other comments?

www.atl.org.uk/worklifebalanceindependent