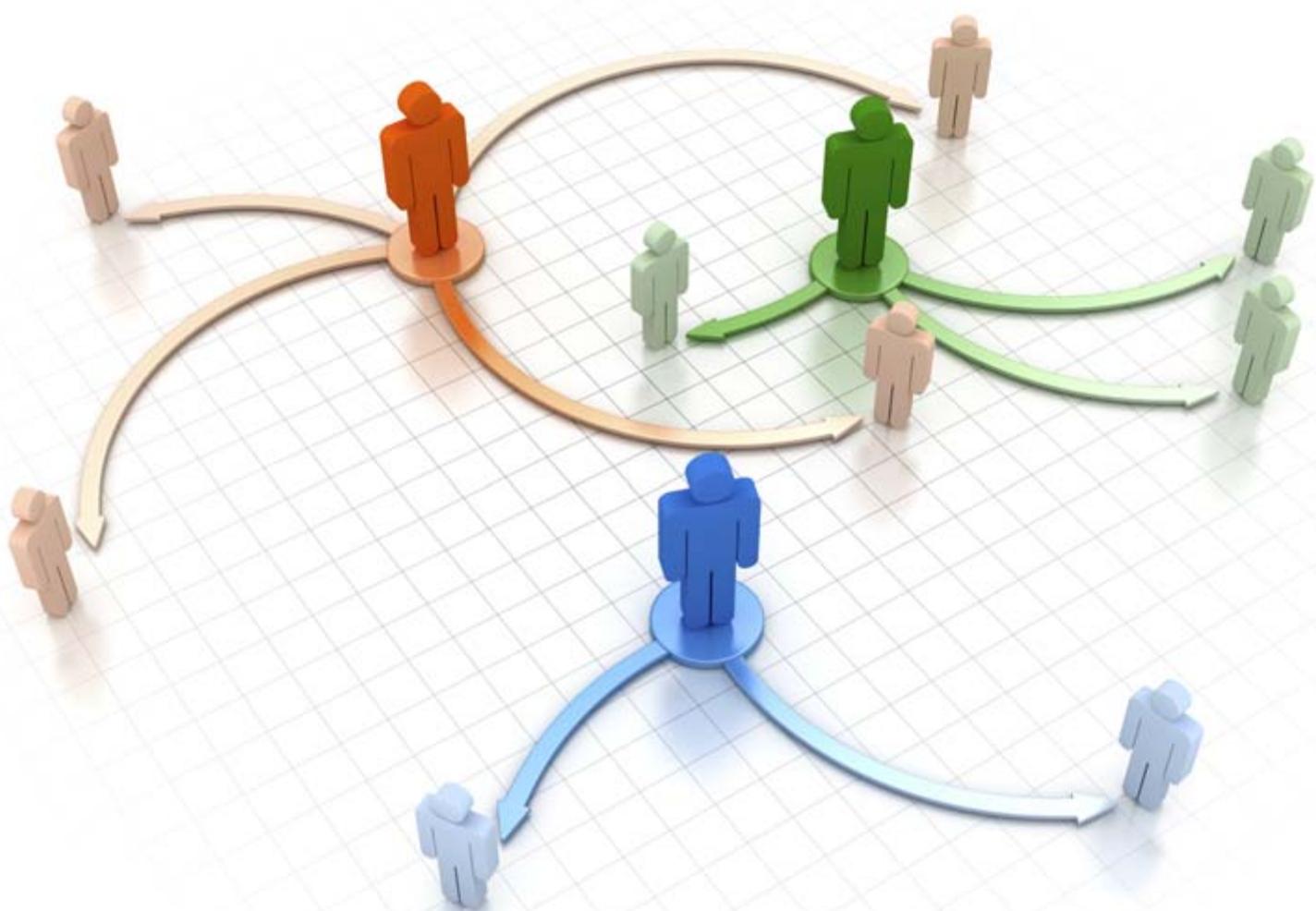


INSIDE SOCIAL PARTNERSHIP: TRANSFORMING THE SCHOOL WORKFORCE (2003-2010)



Debbi Christophers
The Reform Programme

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FOREWORD

“Those who don’t know their history are destined to repeat it”, according to Edmund Burke, generally regarded as one of the philosophical founders of modern political conservatism (the irony is not lost!). Burke had a habit for grasping the essence of the challenges facing social reformers; indeed, his remark that “the greater the power, the more dangerous the abuse” seems more prescient today than at any other time in the last 200 years.

With the benefit of hindsight, it is always possible to look back on a period such as that between 2003 and 2010 through rose-tinted spectacles. But the significance of this moment in the history of education in England and Wales should not be lost, and is apparent from the stories told by those who were inside the Social Partnership.

In the desire of learning from history, Debbi Christophers’ report – *Inside Social Partnership* – seeks to capture the spirit of a golden age in education – the advent of the School Workforce Partnership which was founded on 15 January 2003. The period 2003 to 2010 was, for many, a defining moment in the history of education policy. Arguably, it was the first time that the whole school workforce – teachers and support staff – were put at the centre of the national and local policy development machinery with the aim of securing quality education for all children and young people. And it worked. The Social Partnership secured a programme of profound change in schools that have stood the test of time; turning from concept to reality the goal of building an education team around each child, and creating the conditions and capacity which enabled teachers and headteachers to reassert their professionalism and focus their time on teaching and leading and managing teaching and learning. For the NASUWT, it was also a time of realisation: a time when long-cherished policy ambitions became a reality; a time of improved status, pay and rewards for teachers remaining in the classroom; and a time when the workforce and trade unions were recognised by employers and government as key to unlocking high-quality standards in education.

Dialogue, consultation, participation and shared solution building were hallmarks of that period. It was an incredibly busy time, but a productive period, too, as government, employers and unions worked hand in hand to develop a framework which would ensure and sustain children’s access to educational entitlements – to be taught by a qualified, skilled and committed workforce – and where every child was assured access to support to enable them to realise their full potential.

The programme to transform the school workforce remained a work in progress in May 2010. By that time, much had been achieved, but there was still much to do. Progress had been made in securing entitlements for teachers and headteachers, and further improvements were promised; and, whilst there were also new employment and career development opportunities for support staff and a recognition of the important contribution made by them to the education of children and young people, there was still work to do to ensure they were treated fairly and recognised and rewarded appropriately.

The period 2010 to 2015 brought a halt to progress and a return to old ways of working, where the voice of the profession was excluded from the reform process. May 2010 marked the end of the formal business of Social Partnership working. One of the very first acts of the Coalition Government was to deliberately eschew the concerns and interests of the school workforce, abolishing the Social Partnership structures and, instead, putting ideology before the interests of children and young people. But, despite this, the legacy of the Social Partnership era endured as the changes introduced during that period remained engrained in the culture and practice of schools, defying various attempts by the government after 2010 to abolish these reforms and to turn back the clock.

Many of the contextual challenges and concerns evident prior to 2003 had once again returned by 2015: a deepening recruitment and retention crisis, excessive workload and bureaucracy in schools, and the creeping erosion of entitlements of children and young people vis-à-vis quality education. All of these challenges required a solution that harnessed the potential not only of 23,000 schools but of all staff employed within them. Whilst the landscape for education has altered radically since 2010, particularly with the flush of academies and free schools, many of us continue to believe that by working together we can secure a better deal for pupils and for the school workforce.

Education represents hope for a better future, and an important lesson from our (recent) history is that the spirit of Social Partnership can be the key to unlocking a better future for all.

Chris Keates, NASUWT General Secretary

SOCIAL PARTNERSHIP: AN EDUCATION

Just a day after learning that I was to become Secretary of State of the newly created Department of Children, Schools and Families (DCSF), my education in social partnership began. The next three years until the General Election in 2010 were, for me, a process of continuing professional development – somewhat appropriate given that this was one of the issues I tried to progress within my new remit.

I didn't know a lot about the School Workforce Partnership before taking up the reins at the DCSF, but I quickly understood that it would be critical to the success of my tenure. Establishing this new Department, which would no longer be just about education, but about seeing the child in the round, was one of the key reforms that happened with the transition from Tony Blair to Gordon Brown and I had already been advised by my former Treasury colleagues that if I wanted to drive the cultural change required to bring this ambition to life, engagement with the School Workforce Partnership would be crucial.

With that in mind, the first calls in my new job were to the General Secretaries of the social partners. I was struck immediately by the tremendous sense of collective obligation and cooperation within the social partnership and that – somewhat to my surprise – senior officials within the Department saw the partnership as a help rather than a hindrance. It was clear that keeping its integrity and support would be vital.

A month later I kicked off the process of drawing up a Children's Plan and set up consultation groups across the new Department's wide range of responsibilities, learning from and building on the consultative approach led by the School Workforce Partnership. I felt that what was wanted was the articulation of a collective moral purpose and the Children's Plan provided the opportunity to do that. It gave us a common language about the potential of every child and an understanding of the barriers that got in the way of realising that. Our collective power – education working together with health, youth justice and so on – would be key.

Crucial to my growing understanding of the agenda was the day I spent at Banbury School – a local comprehensive doing well, despite challenging circumstances. I spent the whole day there, sitting in staff meetings, observing lessons and talking to the leadership and got a real sense that the task in hand couldn't be achieved within the school day, that many of the challenges young people faced in their learning depended on what happened outside the school environment, and that my challenge as Secretary of State was to bring together schools, parents and all the right agencies and create the links that would put the child genuinely at the centre.

This wasn't going to be easy. There were always some headteachers who felt it was not their job to look at what happened outside the classroom, but the social partners were supportive of the wider vision. That said, there were challenges: we had to be clear that this wasn't about increasing workload through the back door. If the vision embodied in the Children's Plan was to take hold, further action was needed to reduce bureaucratic and workload burdens and I knew that the School Workforce Partnership would hold me to account on this.

Given the rarity of social partnership in British politics, one might question what's in it for central Government. Why get round the table when you can remain at the head of it? But that would be missing the point. The fact that we would engage with social partners substantially ahead of any policy decision making was fundamental and the time spent with senior representatives meant we undoubtedly achieved better policy outcomes. The process and the trust we had meant that when we amended things we did so with the confidence that the profession was behind us and when we made mistakes we discussed them face to face, rather than being publicly lambasted in the press.

It was also helpful that partners weren't competing for access and influence. The principle that nothing was agreed until everybody agreed, required some long and protracted debates, but was key to success. Crucially, with my former Treasury hat on, it meant that when it came to managing pay and budgets we were able to deliver outcomes that were agreed to be fair in spite of the challenging financial climate. We successfully negotiated a three-year pay deal in 2008 that both fitted with Government budgets and was acceptable to the social partners, and it was the stability of the partnership and the strength of its collective bargaining position that allowed the Review Body to take this long-term view.

All this makes social partnership sound like a no-brainer, but of course there are reasons that it's not more widespread. It imposes constraints on all partners – a commitment to collective agreement can be difficult to maintain when partners differ on the detail, but there has to be an acceptance that there is more to gain from being on the inside than sniping from the sidelines. The collective sense of purpose has to overcome any issues that come along and unions have to sacrifice their ability to be bilateral. Finally, it depends on each partner's ability to be able to properly represent their members and where there were challenges – and I know there were – within their memberships, to keep them on board.

For social partnership to succeed, it needs the following in place: a collective sense of purpose that is bigger than individual differences; the willingness of everybody involved to find solutions; individuals being able to deliver on behalf of the people they represent; and, at a personal level, individual leaders have to want to work together.

Despite the significant change within education and children's services over the last five years, a powerful legacy of the School Workforce Partnership remains. Yes, some aspects of cross-school collaboration have gone as schools increasingly compete for students, but the fundamental multi-agency approach that puts the child at the centre persists. Before Labour came to Government, the teaching profession was held in low esteem. Its professionalisation by the end of our term had significantly increased and it had regained the respect of the public, partly as a result of our focus on CPD, but largely as a result of the work of the School Workforce Partnership in freeing teachers to teach.

Education is only really effective when teachers, headteachers, support staff, governors and parents all want to achieve the same outcome. I genuinely believe there is something very particular in education about a sense of collective moral purpose. And evidence shows that planning an individual pathway for each child, with schools and other services collaborating, and teaching being a continuous learning profession, are critical success factors, and the School Workforce Partnership was crucial in enabling that to happen.

Of course, there were things I wanted to achieve that, sadly, remained undone. I wanted to make it impossible for schools to stand outside the system and refuse to work together. I wanted to continue the work on increasing the standing of the profession with an expectation of continued study by all teachers, increase the professionalisation of early years teachers, and deliver national pay and conditions for support staff. I also wanted to go further in incorporating aspects of children's health and safeguarding into the way schools think about every child's progress – again focusing on the whole child, not just their educational attainment.

My tutelage at the hands of the social partnership was not easy, frequently challenging, but always rewarding. Cultural change isn't easy to achieve – there were particular things that would frustrate particular partners (and they would often vent those frustrations!) – but neither is it easy to dismantle. The legacy of the partnership's collective, unrelenting focus on improving outcomes for all children and young people, boosting the professionalisation of teachers and the status of support staff, and increasing standards, is still felt by every child, in every school, every day. And that is something we can all be proud of.

Ed Balls, Secretary of State for Children, Schools and Families, 2007-2010

OBJECTIVES OF THE WORK AND METHODOLOGY

Much has been said about the implementation of the National Agreement – did it achieve its aims of raising standards and tackling workload? What difference did it make to the working lives of headteachers, teachers and support staff? Yet there has been relatively little examination of the people and process that created and delivered it – the Social Partnership (henceforth referred to as the School Workforce Partnership), made up of the Association of Teachers and Lecturers (ATL), the Department for Education and Skills (DfES, now Department for Education (DfE)), GMB, the National Association of Headteachers (NAHT), the National Association of Schoolmasters and Union of Women Teachers (NASUWT), the National Employers' Organisation for School Teachers (NEOST), the Professional Association of Teachers (PAT, now Voice), the Secondary Heads Association (SHA, now Association of School and College Leaders (ASCL)), the Transport and General Workers Union (TGWU, now Unite), Unison and the Welsh Assembly Government. Together, representatives from each signatory made up the Workforce Agreement Monitoring Group – the body created to oversee the implementation of the National Agreement and to embody social partnership in action.

In this study, we will consider what it was about that moment in history, and the people and processes at play, that created and sustained a social partnership over eight years. Through in-depth interviews with the key actors and examination of primary and secondary source material, we will provide an analysis of what brought it about and why and how it worked; look at the legacy it left; and consider what lessons could be taken forward to any social partnership in the future.

This report is intended to give a sense of what it felt like to be part of what was unquestionably a significant moment in the history of education and industrial relations in the UK.

This report is the work of the author and the views expressed may not reflect those of the NASUWT.

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INTRODUCTION: WHAT IS SOCIAL PARTNERSHIP?

Before delving into the detail of the School Workforce Partnership, it is worth considering what is meant by the term "social partnership". A commonly accepted definition is that given by the Copenhagen Centre for Partnership Studies (2002), which describes social partnership as a "tri- or multi-partite arrangement involving employers, trade unions, public authorities (the State and/or local/regional authorities) and/or others (e.g. voluntary sector). Social partnership is usually concerned with areas of economic and social policy and might be based on a binding agreement or declaration of intent. *Social partners* is the term used to designate the representative organisations of trade unions and employers."

That is the broad outline, but within that definition partnerships vary considerably and this report will consider later how what is often referred to as the School Workforce Partnership differs from others across Europe and beyond. As becomes clear, social partnership means different things in different countries and different things to different people.

One might also consider the difference between what Hugh Compston describes as policy concertation, in his book *Policy Concertation and Social Partnership in Western Europe*,¹ and social partnership. Compston describes policy concertation as being "the co-determination of public policy by means of agreement struck between governments, employers and trade unions."

So what is the difference? Compston is clear that policy concertation is formal consultation, not informal interest. But it is not consultation alone, nor is it lobbying. Some argue that policy concertation is more stable where partners participate through some kind of collaborative, inter-organisational network such, perhaps, as the Workforce Agreement Monitoring Group. So in the case of the School Workforce Partnership, one might conclude that social partnership was the *means* by which policy concertation took place.

There is a limited number of public sector models of social partnership in the EU, despite active encouragement through the European Commission's publication of *Partnership for change in an enlarged Europe – Enhancing the contribution of European social dialogue*, in October 2004, which recognised "that successful economies in the 21st century will not be possible without a modern system of labour relations and efficient strategies for managing change proactively." One specific agreement which has a range of things in common with the School Workforce Partnership is the

Swedish School Development Agreement – an agreement between the Swedish teacher unions and employers, renewed every five years and which focuses on "the basic idea of shared responsibility for a better education system and a salary system that would support school development."

What then characterises a successful social partnership and are there common contexts that lead to their inception? What is it that would persuade Governments to share their policy-making prerogatives with social partners and why would trade unions devote so much of their energies to helping Governments produce effective policy? Most successful social partnerships arise as a response to a serious and shared national problem – a "burning platform" – which brings partners together to develop a shared solution. However, there must be a positive sum-game for all involved to keep the partnership going in the longer term. This report will consider the conditions for success and the dynamics of the School Workforce Partnership's collaboration.

Some critics believe that social partnership is a quasi-unnatural state, because it is seen as an act of collusion on the part of the unions in negotiating with their traditional adversary; an idea put forward by Huzzard et al in *Strategic Unionism and Partnership: Boxing or Dancing?*² Others debate whether unions can maintain their individual stance within an ongoing collaborative partnership and this will be considered later.

Sir Brendan Barber (TUC General Secretary 2003-2012) is just one commentator who praises the School Workforce Partnership as an example of a more progressive approach to industrial relations, which "opened up policy decision-making through real engagement with the unions and provided an opportunity to exert influence through genuine dialogue." Many supporters of social partnership argue that it should replace traditional collective bargaining as the standard operating model for employers and unions.

In summary, social partnership is the means by which all those involved in an area of public policy (typically, Government, trade unions and employers) can work together to achieve common aims. In the case of this report, the policy area was education and the specific aims were to raise standards and tackle workload; the period of operation was 2003 to 2010 and, for clarity, this particular social partnership will be referred to as the School Workforce Partnership.

¹ *Policy Concertation and Social Partnership in Western Europe: Lessons for the 21st Century*; Edited by Stefan Berger & Hugh Compston (2002)

² *Strategic Unionism and Partnership: Boxing or Dancing?*; Huzzard T, Gregory D & Scott R (2004)

THE SCHOOL WORKFORCE PARTNERSHIP

Landscape and Context

"Education has been the Tories' biggest failure. It is Labour's number one priority." Labour Manifesto 1997³

It is rare for anything from a political party manifesto to be remembered by anyone outside the party faithful, but Labour's mantra of "Education, education, education" was one that remains in the collective memory. To quote more specifically from the Manifesto: "Education has been the Tories' biggest failure. It is Labour's number one priority." The Party recognised that after years of turmoil in education under the Conservatives there was an opportunity and indeed an imperative to bring about change in a major public service.

However, prominent manifesto promises mean significant pressure to deliver. As Chris Keates (General Secretary, NASUWT) recalls: "Labour came in having inherited a major crisis in teacher recruitment and retention that had been built up over 18 years. Teaching was seen as the last resort for graduates, morale was low and workload was excessive. Expectations of the new Government were high and these expectations couldn't be met by working in the old ways."

Mary Bousted (General Secretary, ATL) agrees: "The Social Partnership came at the only time it could have emerged, both because of what had gone before and the renewed emphasis on education."

When Labour entered Government, there was little money in education and no systematic training and development for teachers. Within his first month in office, the new Secretary of State, David Blunkett, together with Ministers Stephen Byers and Estelle Morris, met with the six teacher union General Secretaries offering a "fresh start and a new partnership" to build a better education service. One of their first proposals was to look at how to reduce the level of bureaucracy and paperwork, which was threatening to overwhelm the teaching profession.

At the same time, trade unions had long been campaigning on workload. The NASUWT, through its two national industrial action campaigns – 'Let Teachers Teach' and 'Time for a Limit' – put pressure on the Government to address workload. Action such as this, which culminated in the publication of

Circulars 2/98 and 22/98, forced Government and employers to take these issues seriously.

So the workload issue was on the table early on, but it would take some years for it to be really tackled in any meaningful way. Hilary Emery, who joined the Training and Development Agency in 2007 to lead on school workforce development, recalls "a cumulative build-up of expectations on teachers. There was an overwhelming sense of more and more being expected, so as a result recruitment and retention were getting harder."

Following a recommendation from the School Teachers' Review Body's (STRB) Tenth Report in February 2001, the Department commissioned PwC to carry out a study into teacher workload. This, coupled with the unions' ongoing collective concern about workload and the resultant threat of industrial action, made it clear that action needed to be taken.

At the same time, one former Department official remembers a real sense of crisis about teacher recruitment in early 2001, particularly in London, and this was being reinforced by the unions through the press. When figures were released in January of that year showing a massive decline in graduate recruitment numbers, it coincided with the North of England Education Conference in Bridlington.

In response to the graduate recruitment announcement and the ongoing disquiet, Doug McAvoy (NUT General Secretary, 1989-2004) declared: "We will certainly be looking at protective action for members where there is a choice for the local authority between four-day weeks and placing teachers in the invidious position of having to cover and teach classes for which they are not trained." This added to the constant campaigning and threat of industrial action by the NASUWT.

The findings of the PwC report were published in December 2001⁴ and then built on by the STRB,⁵ which confirmed what was already well and widely acknowledged: that teacher workload needed to be tackled, that teachers were averaging 52 hours per week in term time and that qualified teachers were carrying out a significant number of non-teaching-related tasks.

³ *New Labour because Britain deserves better*, Labour Party Manifesto, 1997

⁴ PricewaterhouseCoopers, *Teacher Workload Study* (December 2001)

⁵ School Teachers' Review Body, *Special review of approaches to reducing teacher workload* (May, 2002)

Given the double pressure of the workload issue and the recruitment crisis, it became clear that the solution was to reduce the demands on teachers' time and make the most of that which was available, therefore freeing teachers to teach by stripping out everything that was not directly related to teaching and learning. There was a sense of building the quantum of support for teaching and learning – led by teachers, but supported by paraprofessionals.

The Government had a two-pronged strategy – one element was to continue to increase its efforts to recruit teachers through incentives and better campaigning via what was then the Teacher Training Agency (TTA), the other was to think in a very different way about the school workforce. It is notable that around this time the DfE policy unit known as “Teachers Group” was renamed the School Workforce Unit.

David Miliband remembers being briefed on three key issues when appointed as Schools Minister in June 2002: a longstanding complaint about teacher workload, teachers' professional development and a debate about “associate teachers”. This last issue was not unfamiliar, as during his time at the Institute for Public Policy Research (IPPR) he had worked on Michael Barber's publication with Tim Brighouse, *Partners in Change*,⁶ which had claimed that the teaching workforce was under strain and called for a radical new plan for professional “associate teachers” to be brought into the classroom. The terminology may have changed, but the issue remained the same.

There is no question that something needed to be done – to halt the recruitment crisis, to address teacher workload and to remove the constant threat of industrial action. And it needed to be done differently.

Public Sector Reform: Critical Success Factors

After 18 years of Conservative rule, it is not surprising that Labour came to power with a commitment to public sector reform. After all, public services are the lifeblood of the Labour Party – even the New Labour variety – and education had already been identified within the Manifesto as the number one priority.

Is there, then, a particular context or set of circumstances necessary to trigger or enable public sector reform and, once that trigger has been pulled, what factors are necessary to secure effective implementation?

Dr Nigel Carr, Director of the Reform Programme, who

was Programme Manager for The National Remodelling Team – the change agency given the task of supporting the School Workforce Partnership with successful implementation of the National Agreement on Raising Standards and Tackling Workload – identified the following as critical success factors for public sector reform:

- workforce reform levers;
- social partnership;
- challenge to the system;
- enabling programme;
- implementation resources;
- mainstream delivery;
- public sector resources.

In terms of levers for reform, at the start of the 21st century a number of significant pressures were driving change in education: pupil assessment, social changes, budget constraints, employment legislation, technological changes and Government initiatives, as well as the critical factors of industrial action, worsening industrial relations and the teacher supply crisis. It was what might be called “a perfect storm”. Those issues that have already been considered: retention issues (workload was cited as the major reason for leaving the profession), recruitment (it was becoming increasingly hard to make teaching attractive); the fact that 30% of a teacher's working week was spent on non-teaching activities; teachers were retiring faster (nearly 50% would reach 60 over the next 15 years) and the need for development of professional support staff – all could be seen as symptoms of the wider pressures above. What that created was an opportunity – and a pressing one at that – for schools to improve the working conditions for the whole staff, be more effective and ensure standards continue to improve.

However, this scale of public sector reform could not be achieved without additional resources – both financial, human and tools to support implementation. Christina McAnea, who during the time of the School Workforce Partnership was Unison's National Secretary for members working in education and children's services, is in no doubt that reform of this type could not be effective without adequate resourcing: “The Government was putting money into public services. It was a period of expansion and it felt like the School Workforce Partnership was genuinely about trying to

⁶ *Partners in change: Enhancing the teaching profession*; Sir Michael Barber and Tim Brighouse (January 1992)

improve things for staff and pupils. This kind of reform could not have got off the ground in a time of austerity." In *Time for Standards*,⁷ Estelle Morris underlined this with a commitment of an extra £12.8 billion annually by 2005-06, as a "necessary but not sufficient condition for change."

Social partnership is a critical success factor for any large-scale public sector reform to be truly effective; ensuring that reform is not "done to" but "done with" those affected by it. It provides a foundation for future cooperation and system transformation, and provides a modern, progressive form of Government/ employer/ trade union relations that has the power to effect significant reform through joint objectives, provider-led reform and a shared vision of the future.

In his chapter for the PSRG Collection, Charles Clarke says that "dysfunctional discourse" characterises the relationship between Government and the professions in just about every public service, and so: "The establishment of a new relationship of confidence is a precondition both for the success of public sector reform and for the survival of respect for the professions in the modern era."⁸

Brendan Barber was eager to see the outcome of this new relationship: "I was very keen to see if there could be a successful model of partnership working in a key public service. It would be a positive point for intelligent trade union engagement and the management of public sector reform."

The Government recognised the importance of the partnership, saying in *Time for Standards*, notably subtitled "reforming the school workforce": "Working together with the Government, the education partners must seize the chance to secure a win-win outcome on pupil standards and teacher workload. This generation has a unique opportunity to get this right. We shall not get a second chance."

Origins of the School Workforce Partnership

This report has looked at the context in which the School Workforce Partnership arose – in particular, the education landscape in the late 1990s through to the early years of the 21st century. Yet this did not necessarily mean that social partnership was the inevitable consequence. Indeed, given the limited history of social partnerships in the UK, it might have seemed a surprising outcome. In this section we will

consider the specific set of events and negotiations that led to the creation of the School Workforce Partnership.

Whilst the National Agreement was signed and sealed on the watch of Charles Clarke and David Miliband, we need to go a little further back to the end of Labour's first term to see its origins.

In the autumn of 2001, Estelle Morris brought Lord Puttnam (founder of the Teaching Awards), Ralph Tabberer (then-Chief Executive of the Teacher Training Agency) and one of her senior officials around the table to debate the current teaching situation – principally, what was seen as an artificial supply crisis (unwittingly created by her predecessor channelling increased funding into schools), the workload issue and the constant threat of industrial action.

It was this discussion, amongst others, that resulted in a landmark speech given by Estelle Morris to the Social Market Foundation on 12 November 2001, which led to the pamphlet *Professionalism and Trust*.⁹ This articulated many of the key messages which were to underpin the direction of policy and the work of the School Workforce Partnership well beyond Morris's short term in office: the need for teachers to focus on teaching and learning; the necessity for whole school remodelling; the need to tackle teacher workload – all wrapped around a strong standards agenda.

The implication was that some re-engineering of the teaching profession was needed, with the introduction of a new cadre of para-professionals, similar to that in professions such as law and medicine. *Professionalism and Trust* encapsulated the problem and the need for radical solutions. It summed up the "burning platform". There was a sense at both Ministerial and official level of a need to rethink and that Government's traditional methods of problem-solving were not going to work.

The Department's arguably risky strategy was to use the debate sparked by *Professionalism and Trust* to bring the unions around the table to discuss the creation of a joint platform going forward. Given the radicalism of some of the proposals, there is no way that they could have been delivered (at least not peacefully) without the unions being on board. At the same time, the unions could already see a potentially disappointing outcome after the first term of New Labour with its lacklustre progress

⁷ *Time for Standards: Reforming the School Workforce, 2002*

⁸ PSRG Collection, *Effective Governance and the Role of Public Service Professionals, A Chapter*, by Rt Hon Charles Clarke MP (2007)

⁹ *Professionalism and Trust – the future of teachers and teaching*

on public sector reform, so they were keen to prove that they could be good partners. There was also a certain element of weariness with the confrontational nature of the relationship between the unions and the previous Government. Chris Keates recalls: "We were reeling after 18 years of boom and bust in terms of teachers' pay, ineffective teachers' contracts and frequent industrial action. We were going from one dispute to the next – we would get some gains, but they were never sustainable. We needed a new style of negotiation."

Dr Patrick Roach (Deputy General Secretary, NASUWT) echoes this, calling the School Workforce Partnership "a coherent and rational response to a set of deep-rooted long-term problems. There was a pragmatic element and an ethical element, but fundamentally it enabled us to make decisions and make things happen in a practical way; on the ground."

Brendan Barber and the TUC played a significant role in opening up the process with Government, advising that for any such major change to take effect, they needed to take people with them, and acting as honest broker to Chair the discussions between the unions and Government.

There followed over a year of intense discussion and negotiation. David Miliband joined Estelle Morris as her Minister for Schools in early summer, with Charles Clarke replacing her as Secretary of State in October 2002. Widely considered to be the architect of what was to become the School Workforce Partnership, David Miliband was committed to creating a model that worked. His approach was, as he puts it: "To create a positive sum game. First there was the substantive part in terms of the issues – achieving gains for all concerned by enabling teachers to focus on that which would benefit pupils and at the same time reduce their workload. Secondly, there was the process part – to try and create a social partnership model that worked over the long term."

The double act of David Miliband and Charles Clarke worked well. Clarke is a strong supporter of social partnership as an economic model and one which he feels should have been more at the heart of Labour's strategy. As he puts it: "Schools had been wrecked by conflicts with Margaret Thatcher. We had to get back to a more cooperative approach."

Chris Keates recalls an early workforce group that included representatives from business and the Chambers of Commerce, but this was then stripped back to the Government, unions and employers when it was clear no progress was being made. "David

Miliband brought the hard edge necessary for progress."

These intense discussions were focused around what was to become the National Agreement on Raising Standards and Tackling Workload, which had to set out some wins for all parties at the start. Union leaders had to persuade Executives and members; Ministers had to persuade Cabinet colleagues. The big win for Government was the tacit signalling of industrial relations harmony, but it could have all gone horribly wrong.

The biggest risk to the partnership came in the summer of 2002. Up until that point, the NUT had been around the negotiating table with the other unions, but Doug McAvoy's concerns about the role of teaching assistants in supporting teaching were echoed (somewhat more strongly) by the NUT Executive and, once the concept of the social partnership and the Agreement to underpin it was finalised, they had no option but to sign up or pull out.

The longer-term implications of this will be covered later on, but there is no doubt that this also caused a wobble within NAHT ranks, which had always had strong links with the NUT and significant amounts of cross-membership. But the then General Secretary of the NAHT, David Hart, felt they should be part of this important development and, for the time being at least, faced down internal opposition.

Hindsight is a wonderful thing and there is much speculation about why the NUT really withdrew from negotiations, but nonetheless it is highly likely that they expected the partnership to fall apart without them; that they would effectively have the right to veto.

However, Charles Clarke was unequivocal that the partnership would carry on and, indeed, the Government threw its weight even more strongly behind it – symbolised in the photo of the Secretary of State linking hands with the other signatories to the Agreement on 15 January 2003. The School Workforce Partnership was born.

A Shared Vision

A key component of most successful change models is the existence of a "burning platform", in this case, as has previously been identified – teacher workload, recruitment crisis, need for professionalisation of support staff, and so on. Equally important is the existence of a clear vision and, in the case of a programme that relies on a partnership model to make it work, a *shared* vision.

The vision must enable people to imagine what the future will look like once the change has happened and inspire people to work to make it a reality. It cannot just be the absence of the current problem, but a positive vision of the future.

The language of *Time for Standards* is deliberately visionary, talking about “an historic opportunity to make substantial progress towards a vision of a world-class education system for all” and creating “a school workforce fit to meet the challenges of the 21st century.”

Heath Monk, a former DfES official, says: “There was a shared desire to have teachers focused on teaching, schools being more flexible in the deployment of teachers, and the growth of the school workforce would allow that.”

All partners agree that there was a shared vision of the way that people should work and what the role of a professional teacher in schools should be, i.e. focused on teaching and learning. Whilst that now seems almost blindingly obvious, Brian Lightman (General Secretary, ASCL) is clear that: “It was an ambitious vision and there were tensions on the detail. But we were clear that there are always different ways of doing things, as long as the teacher is always in charge of designing the learning.”

Within that overall shared vision, a partnership model relies on there being something in it for all partners. It could not (and would not) be just the case of trade unions and employers selflessly signing up to help the Government achieve its objectives. Therefore, for example, the NASUWT’s prime concern was the conditions of their members, so the elimination of administrative tasks and reduction of cover was key; for ATL and what was then PAT, it was a chance to be a serious player at the table, and for the support staff unions there was the opportunity for higher status, more training and career progression for their members. For the employers, it was a chance to influence the agenda and be part of a collaborative process.

David Miliband is definite about this: “We were very clear about our goals and thought social partnership was the way of achieving them. You’ve got to give something to get something. This was a way of getting steps forward for the education system with people who had the same commitment to that system, but also had interests of their own.”

That shared vision was very powerful. For the trade unions, having one voice with Government was significant – having their logos sitting alongside that of the Department on the National Agreement, WAMG notes and other documentation that followed was a powerful statement that sent a strong message to schools.

Equally significant was when the unions, on a number of occasions, gave joint evidence to the STRB alongside Government, because it did mean that Government had to think and act differently. It was not a question of ceding power, but about thinking how it might be exercised differently.

Transforming the Modern Professional

The National Agreement had at its core an ambition to refocus teachers’ time on the deployment of their professional skills to deliver high-quality teaching and learning. In order to make that ambition a reality, it was clear that there needed to be some re-engineering not just of the teaching profession, but also of the whole school workforce, to allow: “Time for teaching. Support in teaching. Leadership of teaching. These are the key components of a fundamental reform of the school workforce that will free our teachers to develop new models of teaching and learning that will bring about a transformation in school standards.”¹⁰

Charles Clarke says that there was a somewhat “teacherist” view prevailing in education at the time, which ignored the contribution of the whole school workforce to children’s education and development. David Miliband echoes this, setting out their alternative vision, which was “for every professional working in schools to be recognised as a professional, developed as a professional and deploying their professional skills to maximum effect and to the benefit of pupils. That means spending the most time on the higher value elements of their craft.”

A key element of allowing that focus on higher-value activities was the publication of an illustrative list of 25 non-teaching tasks to be removed from teachers that included chasing absence, invigilating exams, managing pupil data and taking charge of the somewhat contentious classroom display – the majority of which would be transferred to support staff, dealt with through better use of technology or, in some cases, eliminated altogether.

¹⁰ *Time for Standards: Reforming the School Workforce* (2002)

School support staff numbers had been growing steadily over the first term of the Labour Government to bring the number of support staff in schools to around 216,000 (full-time equivalent). Yet they were still seen as a largely homogenous, insignificant group in terms of their influence within schools and the wider sector. GMB's National Secretary for Public Services, Brian Strutton, recalls the importance of David Miliband's speech at GMB's 2004 annual conference, where he set out his vision of a whole school workforce and the role of professional support staff in the classroom: "His commitment made us committed and we began to see it as a workforce we should take more seriously."

The inclusion of the support staff unions in the School Workforce Partnership was an important statement about the role of support staff in schools, symbolising their role in supporting teaching and learning and as valuable members of the team. Charles Clarke says that a key role of the social partners was to agree how best to use all the resources within a school in order to get the best outcomes. He says it was the antithesis to the NUT's popular bumper sticker of the time, which stated, "If you can read this, thank a teacher", because, in fact, there are many more people in schools who contribute to pupils' educational achievements, as well, of course, as their parents and family.

Yet it was not all plain sailing. As indicated earlier, the nature of the 25 tasks caused some debate, particularly in primary schools where the shift was more radical, and the NUT, despite seeking to claim responsibility for originating the list, voiced worries about inappropriate deployment of support staff as its central concern about the National Agreement.

Additionally, there were concerns within the teaching profession about how an increase in professional autonomy, whereby teachers were trusted how and what to teach, could exist within a national legislative framework. If teachers were to be in charge of pupils' learning, then why could they not decide for themselves if it was a good use of their time to put up a classroom display? Likewise, if headteachers were to be free to "remodel school staffing, the organisation of the school day, school week and school year", as cited in *Time for Standards*, how could they do this if they had to ensure 10% planning, preparation and assessment (PPA) time, as well as the implementation of the other contractual changes? As Charles Clarke

says: "The professionals themselves need to be the agents of change, to take command of that process rather than being pressed into it."¹¹

This tension between local and individual autonomy and national legislation rumbled on, albeit fairly quietly, but nonetheless there is a widespread acceptance that a greater professionalism among both teachers and support staff is one of the lasting legacies of the School Workforce Partnership. Deborah Simpson, Principal Professional Officer at what was then PAT, believes that: "It refocused teachers on their professional standing and created a more confident self image." Mary Boustead agrees that: "The professionalism of teachers has greatly increased. It has changed practice and shifted the paradigm."

School Workforce Partnership in Practice

We have considered how the School Workforce Partnership came about and what it meant in principle, but what did it look like in practice?

What is unanimously agreed upon is the level of time, resource and commitment required to drive the partnership forward on the part of the Government, unions and employers. One official has described how, in 2002, before the partnership was fully formed, bilateral and multi-partite meetings were held almost daily to hammer out the detail of the National Agreement and to keep everyone, in the words of David Miliband, "on the bus".

From 2003, formal meetings were reduced to once a week, but they took up the best part of a day and required huge amounts of work, in terms of preparation, follow-up and out-of-meeting negotiation. Anita Jermyn, representing the employers through NEOST, says that "the Workforce Agreement Monitoring Group (WAMG) became almost a lifestyle – it was very intense." Particularly for the smaller unions, that time commitment, often by the General Secretary, was a huge challenge, but as Mary Boustead says: "I never wanted not to be around the table, because you only have to consider the alternative. It tied the unions into the reform agenda and gave teachers a voice. The prize for our commitment was that we got things done."

The Department provided the Secretariat, supported first by the National Remodelling Team and later by the Training and Development Agency (TDA). In recognition of the nature of the partnership, meetings took place not

¹¹ PSRG Collection, *Effective Governance and the Role of Public Service Professionals, A Chapter*, by Rt Hon Charles Clarke MP (2007)

only in Sanctuary Buildings, but also in other settings, including the offices of the NASUWT and ATL, as well as external offices hired by the DfES – a significant departure for officials and an important one. Patrick Roach says that: "Social Partnership was co-produced right down the line; from how decisions were made, to planning activity, communications and dissemination, right through to where we would meet and sharing the costs of the process between the partners."

The partnership was very evidence-driven and once the National Agreement was in full implementation mode, huge volumes of data from the field had to be collated and presented by the NRT/TDA and pored over by the partners.

There was a formal and informal structure. All decisions were taken by consensus and that consensus was always, if slowly, reached because of all the effort made to pre-empt and work through any issues ahead of the meetings. Dame Pat Collarbone, Director of the National Remodelling Team, believes that the level of work between meetings was crucial: "There was a lot less blood on the carpet than there might have been!"

It was undeniably a highly managed model and John Bangs (Former Head of Education, NUT) in his essay "Social Partnership: The Wider Context" suggests that "very few social partnership agreements involve the detail and relationships which exist within the SPA [Social Partnership Agreement]. The SPA has redefined the meaning of Social Partnership away from the meaning commonly understood in the rest of Europe."¹²

Heath Monk contrasts this new consensual way of working with what had gone before: "My experience of meetings before the social partnership was that it was all very scripted with set-piece presentations and the Department having pre-determined the outcome. The social partners got into the issues in a much more fundamental way."

Alan Johnson (Secretary of State for Education and Skills, 2006-7) outlines what he sees as the essential nature of social partnership: "A genuine social partnership is a two-way process – decisions are made together. Everyone involved [in the School Workforce Partnership] felt that it was a genuine partnership, so as the Government it was important that we exposed our arguments and ideas to the unions and listened to their feedback. Even when we didn't like it!"

Partners had to accept that the Government had a

mandate to govern and would set the direction of travel and, in recognition of that, it was agreed that the arbiter would be the Minister for Schools – something that was only resorted to on three occasions, but was a potential risk for the unions and employers. However, there was a clear escalation procedure, which was about getting people in the right place by people working together both nationally and locally, so formal dispute resolution was rarely required.

There were two other key operating principles underpinning the partnership. First, that nothing was agreed until everyone agreed, which inevitably made for a slow and protracted decision-making process, but did make implementation easier at a local level. Hilary Emery is clear on that: "What was powerful was how we reached agreement and then went out and did it. It was the thrashing through that got you to agreement. We would never have got the uptake from schools without having had that forum in which to argue the nuts and bolts." Second was that all discussions were confidential – something which the NUT criticised the partners for, saying that it meant that their voices were "muffled" as a result – but was crucial in keeping the partnership together.

The quid pro quo was a level of concertation with Government rarely seen before. As Brendan Barber says: "My impression of the Social Partnership is that it was very impressive. The level of engagement was very intense. There had never been that access to policy thinking in the Department."

Various partners describe how the shape of WAMG changed over time, with some feeling that some momentum was lost once the phased activity and clear set of milestones of the National Agreement had passed. Others have said that once the austerity measures began to kick in during 2008 it began to feel less like progress was being made and that some level of set-piece policy presentation returned. However, those presentations were also about reaching towards new parameters and exploring other areas of Government policy; even if the impact of the legislative change of the earlier years was not enacted, there is little doubt that WAMG's reach was greater than it had been in 2003.

Nonetheless, there is unanimous agreement that even when it got difficult, partnership was far preferable to the alternative. Hilary Emery says: "I loved it. I loved the challenge of helping to make it work. [The School

¹² FORUM, Volume 48, Number 2, 2006

Workforce Partnership] was one of the most difficult, frustrating, challenging and satisfying things I've ever had the pleasure to work on. Policy we saw during that period was better policy as a result – more effectively implemented and with greater impact."

The Dynamics of Collaboration

With or without social partnership, collaboration is central to the way in which public policy is made. Partnership is about sharing responsibility and overcoming those barriers presented by inter-organisational silos, sectoral boundaries or public/private sector differences of language and approach. There is a shared notion of working together for the common good, which underpinned the existence of the School Workforce Partnership.

In *Markets, Hierarchies and Networks*, Thompson et al suggest that all collaborative relationships derive from one of three governance forms: contracts, partnerships or networks.¹³ Yet in some ways the School Workforce Partnership could be said to accommodate all three – a binding contract in the form of the National Agreement, failure to deliver on which would have led to significant consequences; an informal network in the sense that it was grounded in relationships between key individuals and, of course, partnership, which is often described as collaboration through "joint decision making and production."¹⁴

But there is a reason why it was called the School Workforce *Partnership* – Partnership delivers what Huxham calls "collaborative advantage", i.e. the whole is greater than the sum of its parts.¹⁵ Through social partnership, Government, employers and unions were able to achieve more for their beneficiaries than could have been achieved individually. There was also a commitment to working together in the long term, not just making one-off joint decisions.

But partnership, particularly one as complex and involving as many different players as the School Workforce Partnership, is rarely straightforward. Within the collective will and shared vision, there will always be individual perspectives, priorities and power struggles, which lead to an interesting and sometimes challenging dynamic between partners. Partners within WAMG acknowledge that they often had competing, if not conflicting, interests.

The nature of traditional industrial relations is that unions and employers negotiate together to reach (or not reach) agreement. However, in WAMG, not reaching agreement was not an option. It was, as one partner put it: "Reach agreement or get off the bus." This could make it difficult for those who would traditionally have been on opposite sides of the fence. It also led to a very slow decision-making process due to the underpinning WAMG principle of "nothing is agreed until everything is agreed by everybody". The definition and guidance around what constituted "rarely cover" is an example cited by many partners as a case in point.

Various partners recall difficult moments when people could have questioned whether the partnership could continue. The introduction of Teaching and Learning Responsibility (TLR) payments created internal and external concern; as well as the debate around rarely cover, the notion of cover itself – particularly the use of support staff in that regard – was much more contentious than the introduction of PPA. The greater use of teaching assistants overall caused tension for those with members who secured a lot of their income through short-term supply work. People were also concerned at the introduction of performance management arrangements, which replaced a rather arbitrary system.

It was also difficult for traditional power dynamics and allegiances to be completely overcome. Charles Clarke believes that: "Central Government shouldn't have the power to intervene directly in schools and therefore if any power was given up by us, it wasn't a power that was ever exercised. Government has influence, but not power." Nonetheless, a lot of power sat with the Department always chairing the partnership, and officials are clear that they were there to help deliver Ministerial objectives through the School Workforce Partnership. However, the partnership enabled them to deliver more of the Government's agenda, in part because the period of relative industrial peace allowed the Department to get on with other things, but also because the partnership was engaged in a raft of policy-related discussions which would not have happened otherwise, meaning that the Government was effectively co-developing education policy across the peace with unions and employers.

¹³ *Markets, Hierarchies and Networks: The Coordination of Social Life*; G Thompson, J Frances, R Levacic and J Mitchell (1991)

¹⁴ *Governing Public-Private Partnerships: Analysing and Managing the Process and Institutional Characteristics of Public-Private Partnerships*, E-H Klijn and G R Teisman from *Public-Private Partnerships: Theory and Practice in International Perspective* (2000)

¹⁵ Various essays/articles by C Huxham and S Vangen

Tension between the headteacher and teacher unions was inevitably a factor in the collaborative dynamics. Traditionally, Government had always tended to listen to the headteacher voice but, particularly with the size of the NASUWT, who took a major role in driving forward the partnership, the teacher voice was equally vocal, if not considerably louder.

Chris Keates explains the challenge: "The NAHT were used to collective bargaining and a culture of headteachers having a veto on what went forward. In the Social Partnership nobody had a veto. This was very difficult for the NAHT to sell within its own organisation."

There were some tensions around elements of the legislation. Headteacher unions felt that the teaching unions were trying to tie them down too much in areas where they wanted to retain the headteachers' decision-making power for their members – the 25 tasks and rarely cover being prime examples. As a general rule, headteacher unions wanted a minimalist approach to guidance, where the teaching unions wanted stronger management. This led to extended negotiations on matters that arguably should not have been in the room, but were not necessarily about the detail itself, but as an example of a wider principle.

It was an interesting dynamic for the smallest representative body – what was then the PAT – as well. As Deborah Simpson puts it: "In theory, we had an equal say, but in practice we probably didn't. However, as a non-TUC body, this was a forum for us to both have a say and be in the know. And everybody had input, because everybody had to sign everything off."

The support staff unions were also new to the education table and, as Christina McAnea describes: "To begin with, the Department was very unclear about what to do with us. They would make all sorts of assumptions about what support staff would do – assuming they could just give them more work without any impact on workload or status. This changed over time, but it was a learning process for everybody."

However, the visible collaboration at national level on WAMG was of fundamental importance, because it was modelling a way of working that was then mirrored through local WAMGs and echoed at school level through a whole school conversation alongside a School Change Team, which embodied David Miliband's call for "no class division in the classroom". The partnership was able to continue despite the various external challenges and internal tensions, because it was able

ultimately to persuade the profession that the direction of travel was the right one, and that a united front made the partnership stronger.

Individuals, Leadership and Representation

One of the fascinating aspects of any inter-organisational partnership is the way in which it is built as a collaboration of bodies (organisations), but is enacted by a collaboration of *bodies* (people). The WAMG was run on a day-to-day basis by a collection of individuals – yet the role of those individuals was to represent their own organisation's perspective and act as the voice of their members.

Lowndes and Skelcher, in their book looking at multi-organisational partnerships, draw on an example of a partnership involving a regional Government Office and cite one civil servant who described the process of building trust and infrastructure for more formalised collaborative activity: "I have meetings with X on bridges and pavements in the city – he says what the council can do and I say what we can do, then we put it together. Individuals not institutions is what it's all about – individuals can work together and understand what it's all about."¹⁶

The individuals within WAMG had to perform a difficult balancing act. They needed to represent their organisations and their members, but they also needed to develop and exercise the individual capacity to work across boundaries, reconcile tensions and work effectively with peers to drive forward collaboration.

No matter how committed individual members were to the partnership, this would not be valid without the support and backing of their membership. Almost all partners remember difficult conversations with their Executive. Mary Bousted recalls numerous challenges: "On several occasions I had to speak against motions to withdraw from the partnership – they were never passed, but there was not an uncritical approach to social partnership within ATL. We had to be clear to our members that this is not something that is being 'done to' us. It was our Agreement that we democratically signed up to."

Nigel Carr recalls how almost every conference season at least one partner had a motion opposing the National Agreement or asking for additional support. This created nervousness around the table, but at the same time validated the process because it meant that the partnership took place in the context of a publicly

¹⁶ Lowndes V and Skelcher C (1998) *The Dynamics of Multi-organisational Partnerships: An Analysis of Changing Modes of Governance*, Public Administration, vol 76, no 2

democratic discussion where representatives needed to pay heed to what their members wanted and bring that back to national WAMG.

Patrick Roach recalls how WAMG members became daily advocates for the partnership: "It wasn't just the formal set-pieces at conference, but every time we went out and met anybody, we were advocating for the partnership. It was a relentless process of explaining and educating, and work to persuade people took place every day."

Internal movements, in particular elections, had an impact on the dynamics within the partnership too. Internal elections played a major part in the NUT's decision not to sign up and the NAHT's to later pull out. Events within individual unions affected how they acted with respect to the School Workforce Partnership – this could lead to challenge, but also meant that the partnership was able to address concerns raised through the democratic processes of individual unions, meaning implementation was smoother on the ground, because issues were headed off at national level.

The challenges for NEOST were not the same as for other partners, as its role in terms of member representation is different. Its role is to put information out and support local authorities rather than monitor and enforce implementation, and this led to some areas of contention with the other partners whose approach was much more hands-on.

Representatives at Ministerial level changed numerous times over the course of the partnership and partners recall how those different individuals put their own stamp on things. David Miliband was very hands-on with the partnership during his tenure and his focus was on creating an effective model, which would then drive through the ambition of raising standards and tackling workload. Hilary Emery recalls how "Alan Johnson was much less involved with the detail, but very good on process; while Ed Balls saw it as a key vehicle for taking forward Every Child Matters." Chris Keates agrees, but emphasises how Ed Balls was "the first to put Social Partnership on the tin. He wasn't afraid to articulate that and his support strengthened the partnership." Indeed, Balls was so committed to the partnership that he sought to enact legislation, through the ASCL Act, to ensure compliance, and, on the eve of the 2010 General Election, published his *Teachers' Guarantee*. As subsequent Ministers came through, they saw the School Workforce Partnership as a vehicle for their own policy areas, so perhaps it is through Government that the tension between individual and organisational representation can most clearly be seen.

Breaking with Tradition

Whilst unions have to work with Government to try and win support for their policies, the traditional relationship between unions and Government is typically oppositional – particularly in the late 90s/early 2000s after a long period of Conservative rule. Alan Johnson, a former General Secretary of the Communication Workers Union, feels that in the UK, trade unionism has always been about uniting against the boss and this has never really changed, so, taking this to its natural conclusion, the highest level of boss is Central Government, to which unions are inevitably opposed.

The crucial factor which enabled the School Workforce Partnership and a more progressive union/Government relationship was the intersection of what the Government and unions wanted in terms of practical reform.

David Miliband says: "I felt that the traditional relationship between teacher unions and Government was not productive – for teachers, Government or pupils." This belief led to the creation of the School Workforce Partnership. It was about Government saying to the unions that it would work with them in a very different way – as partners.

Mary Bousted is clear that: "It was a new role for trade unions – moving beyond our traditional oppositional role to more constructive agreement." Chris Keates echoes this: "It made us articulate much more clearly what we were for, not just what we were against."

Of course, this new arrangement was not without its difficulties and it was particularly tricky for NEOST who, as the employers, would have traditionally been on the opposite side of the fence. This probably meant that they agreed to policies they would traditionally have opposed in order to keep the partnership together.

The NUT refusal to sign up has been said by many to be as a result of not wanting to take part in this new kind of collaborative union/Government relationship. What this meant is that the partners could be said to have effectively replaced their traditional enemy (the Government) with a new one (the NUT).

The UK and Europe

This is not a fully comprehensive nor academic study, but it is worth making reference to some of the differences between the School Workforce Partnership and other social partnerships across Western Europe.

In Stephen Boyd's research on European social partnership models, carried out to inform thinking on

the development of a Social and Economic Partnership in Scotland, he found that "social partnership continues to be the norm in Western Europe and commonly involves concertation in employment policy. Significantly wider policy concertation occurs only in Austria and Ireland."¹⁷ He found very little in the UK, but the work predated the School Workforce Partnership and Agenda for Change, which came into operation on 1 December 2004 around an agreement between the unions, employers and Government to harmonise pay scales and career progression across traditionally separate pay groups in the NHS.

As a general rule, Boyd concludes that social partnership seems most active and all-encompassing in smaller countries. The partnership agreement in Ireland covers most of the economy, wage levels, workplace issues and social inclusion. In Austria, which seems to have the most embedded system, social partnership is more of an ongoing method of policy making, rather than a one-off that focuses on a particular sector or issue.

One of the partnerships which draws most comparison to the School Workforce Partnership is the Swedish

School Development Agreement, about which Colin Brock says: "The decentralisation of schools and the five-year school development agreement have given teachers an increased influence over the development of the school and, at the same time, an increased responsibility for its development."¹⁸

John Bangs feels that what was lost by the School Workforce Partnership was "a major opportunity to establish a social partnership model of the Scandinavian countries at the time. It could have shifted industrial relations inside the education sector to an embedded structural dialogue that subsequent Governments would have found harder to ignore."

Heath Monk agrees that this would have been the ideal outcome, but feels that Sweden has the advantage of a much more stable political system, having been dominated by the Social Democrats for the vast majority of the last 100 years, and a more stable education system, less subject to the whims of individual Ministers and the constant arrival of new initiatives.

¹⁷ *Partnership Working: European Social Partnership Models*, Stephen Boyd, STUC, August 2002

¹⁸ *Education in a Single Europe*, Dr Colin Brock and Withold Tulasiewicz, 2002

ISSUES AND ACTION

Transforming the School Workforce Pathfinder

As a precursor to the wider rollout of workforce remodelling and to test out some of the ways in which schools might reduce teacher workload, in spring 2002 the DfES launched the Transforming the School Workforce Pathfinder Project (TSWP) – a pilot project in 32 schools with a further nine comparator schools. The aims were to secure reductions in the weekly hours worked by teachers and to increase the proportion of those hours spent on teaching or directly related tasks.

These aims were supported by change management training, overseen by a team from the London Leadership Centre led by Dame Pat Collarbone, together with the following resources to initiate new working practices: consultancy support, funds for additional support staff, provision of ICT hardware and software, funding the bursarial training of school managers and providing schools with capital build resources.

The success or otherwise of the Pathfinder has tended to arouse controversy due to the additional resources that the schools received, which would not then be replicated across the country. Charles Clarke says this is because “‘Pilot schemes’ are still seen as somehow apart from regular public services, so the issue becomes finding funds to extend the pilot rather than turning the positive lessons learned from the pilot into regular professional practice... So the commitment from both Government and the profession, in each area, should be together to learn the lesson of the pilots and then to apply it to transform professional practice.”¹⁹

Caroline Coles, former headteacher of Horton Lodge, one of the Pathfinder schools, supports this and is adamant that the money was not the most important thing: “We weren’t just given money, we were given licence. We were given permission to do things that we couldn’t do within the parameters of the local authority. We were given the right to explore different territories and to do it rapidly.”

Heath Monk agrees: “TSWP was like a practice run – a lot of ideas ended up in the later guidance. It went from being something that cost a lot to something that would save money and create efficiencies.”

So what kind of things did the Pathfinder schools do? Schools had funding to appoint additional support

staff, but the project evaluation concluded that more important was how schools changed the role of support staff and raised their status.²⁰ For example, at Park Vale School, a full-time bursar was appointed which improved management and access to financial data and created a more efficient line management system for administrative staff. In the small schools cluster there was strong evidence that the role of teaching assistants developed in ways that enabled teaching headteachers to have time to lead and manage the school.

In order to review and reduce workload, teachers were encouraged to question their roles, and schools gave examples of tasks that were transferred to others. At Meadow School, “Planning became more efficient with guaranteed meeting time in the working day, but it is how teachers began to question their role and work-life balance that can be seen as a major breakthrough.”

Some schools looked at altering the school day, restructuring the school week or reconfiguring a particular day, and ICT was also used to reshape learning. Schools also road-tested the idea of Change Management Teams. These teams were made up of staff from all levels and they were encouraged to engage in “blue sky thinking”.

Despite the relatively short timeframe, the formal evaluation found that the Project had made an impact on reducing teachers’ working hours. It also made the role of support staff more prominent and effective. There was some controversy, largely fuelled by the media, about initiatives such as providing dog-walking or ironing services for teachers, but these were isolated and largely insignificant incidents. There were concerns, though, about the sustainability of some changes that had come as a result of extra resources. This was something that would need to be addressed by the School Workforce Partnership in the national rollout of workforce reform.

The National Agreement

The National Agreement on Raising Standards and Tackling Workload was the central hub around which the School Workforce Partnership revolved. The School Workforce Partnership would not have existed without

¹⁹ PSRG collection, *Effective Governance and the role of public service professionals*, Chapter by Rt Hon Charles Clarke MP (2007)

²⁰ *Transforming the School Workforce Pathfinder Evaluation Project*, February 2004, Hywel Thomas et al

the Agreement, and vice versa. The Agreement brought the partners together and kept them there over the following eight years, and its significance for both the partnership and the wider education landscape cannot be underestimated.

As it says in the introduction to the Agreement itself:

"This document represents an historic National Agreement between Government, employers and school workforce unions to help schools, teachers and support staff meet the challenges that lie ahead. It promises joint action, designed to help every school across the country to raise standards and tackle workload issues."

This was a bold statement of intent, at the same time recognising the significance of both the Agreement and the partnership that brought it about.

Signatories to the Agreement were: ATL, the NASUWT and PAT (now Voice) representing teachers; NAHT and SHA (now ASCL) representing headteachers; GMB, TGWU (now Unite) and Unison (representing school support staff); NEOST representing employers; the DfES and the Welsh Assembly Government.

Deciding who the signatories would be was not without debate. Judith Bennett, former Chair of the National Governors Association (formerly National Governors Council), says: "We felt that governors should have been one of the signatories to the National Agreement. The argument was that NEOST was there to represent employers, but if we had been a signatory it would have been easier to sell it to governors and they needed to be on board if it was successfully to be implemented in school." Chris Keates feels that, on reflection, the Local Government Association (LGA) should have been around the table, but at the time the signatories were felt to be the right ones.

The Agreement is set in the context of the need to find new ways of raising standards, in particular by supporting pupils who need the greatest help and relieving teachers of "the shackles of excessive and inappropriate workload". It is made explicit that raising standards and tackling workload are interdependent and that schools would also need to deploy more support staff in extended roles – money for which was dependant on and delivered by the autumn spending review.

A seven-point plan was set out to create time for teachers, headteachers and standards, which it is worth summarising here:

- progressive reductions in teachers' overall hours;

- changes to teachers' contracts so that they would:
 - not routinely undertake administrative and clerical tasks;
 - have a reasonable work/life balance;
 - have a reduced burden of cover for absent colleagues;
 - have guaranteed PPA time;
 - have a reasonable allocation of time in support of leadership and management and, for headteachers, dedicated headship time.
- an attack on unnecessary paperwork and bureaucracy;
- reform of support staff roles;
- recruitment of new managers, including business and personnel managers;
- a national change management programme;
- monitoring of progress by the signatories.

The plan makes clear that promoting the Agreement was a shared responsibility between Government, headteachers and leadership teams, teachers and support staff, local education authorities (LEAs) and school workforce unions, but a significant share lay with the Government in terms of articulating the vision, freeing schools from bureaucracy and, crucially, ensuring that resources were available to deliver the necessary workforce reform.

What is critical is that the Agreement was not just a statement of intent, but a plan of action that was enshrined in legislation through changes to the School Teachers' Pay and Conditions Document (STPCD), which sets out the statutory requirements for teachers' pay and conditions for maintained schools in England and Wales, and which schools and local authorities had to abide by.

Implementation of the changes was to be phased in the following way:

Phase one – 2003

- Promote reductions in overall excessive hours;
- Establish monitoring group;
- Establish new Implementation Review Unit;
- Routine delegation of 24 non-teaching tasks;
- Introduce new work/life balance clauses;
- Introduce leadership and management time;
- Undertake review of use of school closure days.

Phase two – 2004

- Introduce new limits on covering for absent teachers (initially 38 hours/year).

Phase three – 2005

- Introduce 10% guaranteed professional time for PPA;
- Introduce dedicated headship time;
- Introduce new invigilation arrangements.

These were unquestionably substantial and significant changes and so the phasing was important. It meant that schools had a clear timetable to stick to and could expect appropriate guidance to accompany each phase. The changes were also phased to build in complexity, starting with those that were perceived to be easier to implement and giving schools three years to bring in what was anticipated to be the most challenging change – the introduction of 10% guaranteed PPA time.

Early tasks for the WAMG were to:

- consider details of the change management programme and arrangements for collecting evidence;
- establish how quickly progress can be made on reducing the limit on cover to below 38 hours;
- establish regular liaison with the Implementation Review Unit;
- review circulars 2/98 and 22/98, to agree revised text, implementation strategies and timescales;
- contribute to a review of the use of school closure days.

If the Agreement itself was historic, it also heralded a completely new way of working for the Department and its new partners. It was a highly efficient, almost military-style operation. Officials recall weekly meetings with the Minister for Schools (David Miliband and later Jacqui Smith) where progress was monitored using a traffic-light system and any issues were escalated to ministers. Officials were also able to draw on support from the unions when there were implementation problems in individual schools, which was a very different dynamic to the norm and aroused some suspicion from other policy areas within the Department.

In order to provide the detail on implementation progress at school and local authority-level, and to support schools with the change management necessary for this level of reform, a change agent was appointed in the shape of the National Remodelling Team (NRT). Headed up by Dame Pat Collarbone, who had led the TSWP, supported by a mix of educationalists and consultants, its role was to support schools, local authorities and the School Workforce Partnership.

The NRT was initially created as a division of the National College for School Leadership (NCSL), but with its own location, branding and ways of working. Despite its appointment by the partners, the NRT had to earn the right to become the implementation vehicle for the National Agreement and this took time. Nigel Carr, who was the key figure within the NRT for managing the relationship with the social partners, describes the journey as: "In year one, WAMG knew more than we did about what was going on in schools and they told us. By year three, we knew more detail about what was going on and we were able to report back to them."

As a change agent, the NRT was very much a support mechanism. Mary Boustead describes it as "the field force of the Social Partnership, which gave us information on implementation progress and therefore informed what guidance was needed." WAMG governed the actions of the NRT and, as Nigel Carr puts it: "They were the worst steering group because they were all over the detail, but they were the best steering group because they were all over the detail."

The NRT's key roles were to train the field force of Local Authority Remodelling Advisors, Consultant Leaders and Union representatives who were responsible for directly supporting schools, to provide detailed information to WAMG on implementation progress, and to support them with the delivery of guidance notes and resource packs created by the social partners. A "war room" was set up to track progress, which highly impressed Michael Barber from the Prime Minister's Delivery Unit on a visit to the NRT's headquarters at Alfred Place in London. The level of detailed information was unprecedented.

WAMG itself ran a "helpline" for schools and questions were divided up for partners to respond to. Dealing with queries was a time-consuming process, particularly for the smaller unions, but one which partners committed to as a key part of their role in driving and supporting implementation. Patrick Roach acknowledges that the telephone helpline tested everyone's mettle, but dealing with the challenges faced built an extraordinary degree of confidence between partners as they had to trust each other to answer on behalf of the partnership.

In spite of not being signatories to the Agreement, governors' organisations were invited to attend WAMG meetings regularly. Judith Bennett recalls that individual governors often regarded the National Agreement with suspicion and that there were particular concerns in primary schools, which were not

so used to deploying support staff and could not see how they could implement PPA time.

One solution was for the NRT to work with the governors' organisations – at that time NAGM and NGC, as well as the coordinators of governor services – to produce a series of guidance packs to support governing bodies with implementation by focusing on what the National Agreement meant for them. This then enabled the NGC to go out and sell it to governors. As Judith Bennett says: "We had to make it work, because if there was a problem in a school it would end up on the governors' table and it would be far better to be pro-active than reactive."

Research carried out by Ofsted at the end of 2004 on progress of implementing the first phase of the National Agreement found that the majority of schools had made good progress in transferring the specified administrative and clerical tasks, but that the implementation of the other two objectives had been slower.²¹ Progress tended to be faster and easier in secondary and special schools, and particularly difficult for the smallest primary schools.

A year later things had moved on and Ofsted found that "most schools in the survey are beginning to understand the potential of the remodelling agenda to improve the quality of education and raise standards. Nearly all schools have made at least satisfactory progress in restructuring their workforce, allowing a greater focus on improving the quality of teaching and learning."²² The majority had met the requirements of phase 2 and were well-placed to implement the phase 3 requirement to provide PPA time. The changes that were proving most challenging were the provision of leadership and management, and dedicated headship time. By 2009, the DCSF publication *Securing our Future: Using our Resources Well* is clear that "the National Agreement and remodelling have led to a transformation in the schools workforce."²³

Considering the scale and significance of the contractual changes, implementation went relatively smoothly, perhaps because, notwithstanding some specific challenges, headteachers and school teams were able to see the benefits of the change and the potential of workforce remodelling to enable a greater

focus on teaching and learning. This is backed up by a survey carried out by the NRT between July and December 2004. Based on information from 1,211 questionnaires, 81% of respondents firmly believed that remodelling would improve standards and nearly a third felt that it would improve standards "considerably".

The short- and long-term impact of the National Agreement will be considered fully later on, but at the time of writing, there is almost unanimous agreement that PPA was its greatest success.

Caroline Coles, former Head of Horton Lodge, joined the NRT as a National Advisor, following her school's participation in the Pathfinder, and was responsible for leading the support for PPA implementation. She recalls a complex process of training local authority remodelling advisers, union representatives, governors and headteachers, backed up by case studies, a helpline and a WAMG guidance pack: "Despite the challenges, it worked because it was a policy that teachers loved, the unions backed and the Government wanted. It was tough for some headteachers, but because it wasn't a one-size-fits-all solution they were able to grasp it as a problem they could solve in their own way to suit their school. It is now completely embedded in schools and teachers will protest if they don't get their PPA time."

Mary Bousted agrees: "The achievements of the National Agreement were immense. It has changed practice and shifted the paradigm. The legacy is there every time a primary teacher gets PPA time."

The Remodelling Process

Time for Standards set out a vision of a world-class education system that would require transformational change. It put forward a restructured teaching profession and a reformed school workforce. It recognised, however, that: "Changing organisational behaviour and culture is not easy. Research has shown that organisations seeking to transform themselves need to develop the capacity for questioning existing structures to create a vision of what they might achieve; and they need the ability to recognise and deal with barriers to change."²⁴

It was therefore decided that a national change management programme was needed to support the

²¹ *Remodelling the School Workforce Phase 1*, Ofsted, December 2004

²² *Remodelling the School Workforce – A report from Ofsted*, December 2005

²³ *Securing our Future: Using our Resources Well – a discussion paper on the better use of resources in schools*, DCSF (2009)

²⁴ *Time for Standards – Transforming the School Workforce*

delivery of workforce reform. This process was known as “remodelling” and the change agent responsible for training schools in and supporting rollout of that process was the NRT.

The NRT was led by Dame Pat Collarbone who, together with colleagues at the London Leadership Centre and management consultants, led the TSWP. The TSWP helped roadtest the remodelling process on 32 schools before the wider rollout.

The objectives of the remodelling process were to:

- focus teachers’ time and energies on teaching and learning;
- refocus time-consuming, non-teaching activities;
- facilitate the use of new technologies to improve efficiency and effectiveness;
- assist headteachers and School Change Teams to optimise the use of resources to meet contractual changes;
- learn and share innovative practices within and between schools;
- enable schools to deliver solutions to workload issues appropriate to their individual context and circumstances;
- encourage school leaders to take control of and lead the change agenda appropriate to its situation, taking account of appropriate Government initiatives;
- quicken the pace of the implementation of the National Agreement to raise standards and tackle workload.

Schools were trained in the change process and a range of tools and techniques that were designed to build sustainable change, driven from within each school. To support this frontline delivery, a “remodelling field force” was built comprising over 1,000 trained local authority remodelling consultants, around 100 core/regional NRT resources, 85 regional remodelling trainers, over 2,000 trained local WAMG members, over 1,000 trained union and association remodelling advisers, nearly 300 National Agreement remodelling champions and, later, over 150 extended schools remodelling champions.

Dame Pat Collarbone describes how the remodelling process created the environment for National Agreement implementation in a way that was very different to what had gone before: “Remodelling was about getting people to do things differently by working *with* them not doing *to* them. It was about giving people the authority and the process to enable

them to come up with their own solutions. This was very different to the usual way of working in schools – heads were used to just implementing directives with no process behind it.”

She is also clear that the role of the Social Partnership in supporting remodelling was fundamental: “Remodelling was the Social Partnership’s way of getting things done and they supported it through their notes and resource packs and through the training up of their members. We reported in to WAMG and this gave it coherence and credibility.”

Despite a structured change management process, a key principle of remodelling is that there is no one-size-fits-all solution. Remodelling depended on what priorities schools themselves identified, taking into account local conditions. This sat well with headteachers, who are naturally resistant to being told both what they must do and how they must do it. Naturally, there was apprehension from some schools at first – for many, it was a very different way of working – but as momentum built and they saw the potential of building a change team, they began to get excited.

Deborah Simpson, WAMG’s representative from what was then PAT, is a remodelling enthusiast: “The remodelling process had a huge impact. It rolled out a model for change that was new to teachers and helped fill gaps in their skill sets. It gave people a framework, so people knew they were doing it right, but could adapt it to their own conditions. The NRT had a dual function – rollout and monitoring – the like of which we’d never had and meant that we could base decisions on fact.”

Heath Monk agrees that: “Remodelling was a big shift in approach from the Department just handing out money to a process to enable change. The idea of cross-functional teams was new and the best schools saw it as an opportunity to have a whole-school conversation. But there were others who just did it because they had to and others who simply ignored it.”

Chris Keates is clear that remodelling was not an end in itself: “It should be seen as the context in which new strategies are delivered, rather than as yet another initiative.” This was important as the intention was to build capacity in schools that would equip them to deal with the inevitable new priorities and initiatives that would come both centrally and locally.

This was backed up by the findings of the National Foundation for Educational Research which found that LEA remodelling advisers “expressed particularly

positive views about the adaptability of the NRT training materials to meet local demand” and that the process was considered “fit for purpose and provided enough flexibility to be adapted to the needs of the local setting.”²⁵

It also meant that schools got much better at managing change so, as Hilary Emery describes, “as we moved further into implementing extended services we went from a ‘burning platform’ to a ‘new horizon’ model of change and the supporting process reflected both that different emphasis and schools’ increased capabilities.”

The Role of Support Staff

One of the most significant aspects of the National Agreement and workforce remodelling was the increased deployment of support staff to carry out a range of tasks previously carried out by teachers.

The number of support staff in schools had been on a steady upward trajectory from around 140,000 in 1997 to over 216,000 in 2002, described in *Time for Standards* as a “quiet revolution [is] making our schools unrecognisable compared to the staffing picture even of ten years ago.” Nonetheless, despite the increase in numbers, the perception of the role and status of support staff was fairly limited. Brian Strutton is honest about the fact that: “Before [the National Agreement] support staff had been regarded as ‘mums cleaning out the paint pots’ by policy makers, by us and by themselves.”

Yet *Time for Standards* set out a vision of increasing numbers of other adults playing different roles to free up teachers’ time, including exam officers, ICT technicians, invigilators, learning mentors and cover supervisors, as well as the use of other experts such as sports coaches, music and drama specialists, and business people to add value to the teaching provided by those with Qualified Teacher Status.

It was essential, therefore, to have support staff unions around the table in the Social Partnership. David Miliband explains why this was significant: “It bridged the gap between headteachers and teachers, between teachers and support staff. I had a slogan at the time which said ‘No class division in the classroom’, which could equally be applied to the staff room, which in some schools support staff had not previously been allowed to enter.”

Brian Strutton says that for GMB the Social Partnership presented two opportunities. One was to be able to discuss with the Government its policy towards what was becoming a significant chunk of GMB’s membership. The second was to have a seat at the education table, which, as a generalist union, was a unique thing: “Nothing short of a breakthrough.” In support of this, GMB built teams of officers to go out to schools and talk to support staff, resulting in 100,000 new classroom support staff joining the union over six years.

Christina McAnea agrees about the significance for support staff in being part of the Social Partnership: “We definitely helped put support staff on the map – with schools, with government, with employers. That they are not just one homogenous group, but differentiated with different training needs, different levels, different employment rights and so on.”

In schools, too, support staff were making a real difference. Speaking in *The Guardian* in March 2005, Brendan Lougrahan, Head of Westhoughton High School in Bolton, described how the reorganisation of non-teaching staff had cut spending on supply teachers, replacing them with a team of learning supervisors to provide staff cover, meaning less disruption for students and more time for teachers to plan, prepare or undertake training.²⁶

“The important thing is that the quality of cover has improved,” he said. “Students are getting a better learning experience and they work better. And staff sickness, in particular stress-related absence, is down.”

Dave Binnington, Head of Kingfisher Primary School in Doncaster, also speaking in *The Guardian*, was equally enthusiastic about the role of support staff: “Two thirds of the employees at my school are not teachers and this process has given them a voice. It’s built up their self-esteem and that, in turn, has energised the school to move forward.”

Not everyone agrees. John Bangs says: “The National Agreement led to an inappropriate use of teaching assistants in schools and has left a legacy of problems with support staff in primary schools.” However, research carried out by the Education Endowment Foundation in 2013 found that “when used to support specific pupils in small groups or through structured interventions, teaching assistants can be effective at improving attainment.”

²⁵ *Evaluation of the National Remodelling Team – Year 3*, National Foundation for Educational Research, July 2006

²⁶ ‘Remodelling – What it means for Schools’, *Education Guardian*, 1 March 2005

There were also issues in terms of a deal on support staff pay and conditions. Steps forward were taken in that national guidelines, profiles and job evaluation schemes were set up, but national terms and conditions and what that meant in terms of pay were never achieved.

There was some feeling that the National Agreement had delivered for teachers, but not for support staff, and so the School Support Staff Negotiating Body (SSSNB) was set up through the Apprenticeship Skills Children and Learning (ASCL) Act 2009, with the aim of creating a national pay framework, equivalent to that for teachers, rather than pay being set locally by the school or the local authority.

Unfortunately, a deal was not reached by the time of the 2010 General Election and in October that year Michael Gove announced plans to abolish the SSSNB, prompting this response from Andy Burnham, Labour's Shadow Education Secretary: "In January this year Ofsted said that workforce reform had made a difference to pupils' learning because staff had clear professional status. Abandoning a national pay and conditions framework will undermine this and create a race to the bottom on pay."

Every Child Matters and Extended Schools

Once the implementation of the National Agreement was underway, it was perhaps inevitable that the Government would look to maximise the impact of the School Workforce Partnership by engaging WAMG in the introduction of other policy priorities and through the use of the remodelling process as an agreed mechanism to get into schools.

Every Child Matters (ECM) was a Green Paper launched by the Government in 2003, at least partly in response to the terrible death of Victoria Climbié.²⁷ It put forward a range of measures to inform and improve children's care, including requiring local authorities to bring together all services for children under one person. It also set out the aim of achieving the following five outcomes, which children and young people said mattered most to them:

- being healthy;
- staying safe;
- enjoying and achieving;
- making a positive contribution;
- economic wellbeing.

At national level, the Government created a new Minister for Children, Young People and Families within the DfES to coordinate policies across Government. This integration was then taken one step further in 2007 with the appointment of Ed Balls, arguably the most powerful man in Government next to the Prime Minister, as Secretary of State for the newly created Department for Children, Schools and Families (DCSF).

One of the strategies for achieving the five outcomes was the promotion of full-service extended schools – "schools which are open beyond school hours to provide breakfast clubs and after-school clubs and childcare, and have health and social care support services on site."

On first being presented with this new policy area by the extended schools team from the DfES, the social partners were nervous. Workload implications had not been properly considered and there was reference to teachers delivering after-school clubs and so on.

Whilst individuals within WAMG supported the ECM outcomes and the notion of extended schools as a means of fulfilling them, their role within the partnership was to represent the interests of their members, which in this case meant ensuring that the gains made in terms of workload were not negatively affected by this potential new diversion.

After their initial presentation, members of the extended schools team returned to WAMG – this time having ensured that their plans were aligned with the contractual changes of the National Agreement. They agreed to work with WAMG and the NRT to ensure that teacher workload was not affected and that implementation would have the National Agreement and remodelling at the heart of it.

An unexpected outcome was the appointment of the NRT as the change agent of choice for extended schools delivery, thus ensuring that there would be alignment with National Agreement implementation. It also meant that existing channels to get into schools through local authorities could be used, as could the NRT's Continuous Quality Improvement (CQI) process. Social partners were concerned, however, that the existing Remodelling Advisers might be diverted away from the National Agreement, so the Department agreed to fund a new cadre of Local Authority Extended Schools Remodelling Advisers, who were trained up by the NRT using the established remodelling process.

²⁷ Every Child Matters – September 2003

Having had its initial concerns addressed, the Social Partnership then set out its official guidance in WAMG Note 11 published in March 2005.²⁸ This reinforced its belief that the work that schools had been doing on the implementation of the National Agreement, and their experience of the principles of workforce remodelling, would put them in a good position to manage the changes involved in the rollout of the children's agenda.

However, it was clear that headteachers did not need to be responsible for the delivery of extended services, that this new initiative must not derail the progress made to a reduction in workload and improvement in school staff's work/life balance, and teaching staff must continue to focus on teaching and learning: "It is not, therefore, the intention nor is it necessarily appropriate or possible, for headteachers, teachers and other school staff to deliver the extra hours of provision. Neither should teachers or headteachers have additional workload placed on them through any expectation that they should lead or coordinate delivery of extended services."

It was also stated that when considering the extended services they may wish to offer, all school staff and recognised signatory unions should be consulted from the outset. This was then echoed, albeit briefly, in the Government's publication on planning and funding for extended schools, published in 2006.²⁹

Using its change agent, the NRT, WAMG supported a pilot programme of extended schools to work through the practical implications of the children's agenda. It also published an Extended Schools Resource Pack in autumn 2005 to provide detailed guidance and capture learning from the pilot.

After WAMG's initial reservations, this became a strong example of how, through the School Workforce Partnership, the Department was able to ensure that all policy areas were aligned with the National Agreement. It also demonstrated how, under WAMG's supervision, the NRT had created a collaborative approach to change management that involved all members of the school workforce and enabled extended schools to be created with the contribution of members of a wide and diverse workforce.

ECM remained a central tenet of the Government's strategy, setting the direction for a new set of reforms following the tragic death of Peter Connolly, Lord Laming's report³⁰ and the Government's subsequent response³¹ and action plan³²; finding physical manifestation in the pictures of young children covering the walls of Sanctuary Building during Ed Balls' tenure.

Financial Management in Schools

"In spring 2003 the Government was faced with the allegation by schools and councils that there was a major funding crisis in schools," according to an Audit Commission report, although that same report challenges the veracity of that accusation.³³ Nonetheless, many schools were suffering from falling rolls, which created a problem in a system where funding was determined on a per-pupil basis, but the overhead, fixed costs of running a school remained the same.

In response, the Secretary of State announced a range of measures to bring stability to schools' funding and support those in financial difficulty. One of these was the Financial Management in Schools (FMiS) programme, funding for which was announced by the Chancellor of the Exchequer on 29 October 2003.

FMiS was designed to support schools to create capability within the school leadership team and governing body to better manage and adopt a strategic approach to financial planning. It was put together by a range of partners including the governors' associations, NCSL, KPMG and, representing the social partners, NAHT, ASCL and the DfES. The programme was made up of strategic financial planning workshops, a helpdesk, website and direct consultancy. It was predominantly focused on those schools with serious financial problems – they were able to access one-to-one consultancy from KPMG – but the tiered offer meant that all schools could draw down on it.

Schools were being given responsibility for managing their own budgets with the budget management cycle changing from a one-year to three-year cycle. This gave much greater freedom for schools to determine how to distribute their budget, but inevitably moving from one system to another was difficult because the

²⁸ WAMG Note 11 – Every Child Matters and Extended Schools (March 2005)

²⁹ *Planning and Funding Extended Schools: a guide for schools, local authorities and their partner organisations* (2006)

³⁰ *The Protection of Children in England: A Progress Report, The Lord Laming report*, March 2009

³¹ The Government's interim response to Lord Laming's report was published on 12 March 2009

³² *The Protection of Children in England: Action Plan. The Government's Response to Lord Laming*, May 2009

³³ *Education Funding – The impact and effectiveness of measures to stabilise school funding*, Audit Commission, 2004

infrastructure was not set up for it, so many school leaders were keen to take up the offer of support with financial planning.

Although the programme was very much a response to a situation of schools in financial crisis, it aimed to embed better financial management across the system and was linked closely to NCSL's bursar training, which had the same aim. Additionally, the move to a three-year planning cycle meant schools could make more informed, strategic decisions about staff deployment, so supporting schools with the imperative to remodel their workforce and get teachers back in the classroom.

FmIS highlighted the link between financial management and longer-term school improvement strategies and, although WAMG was not directly responsible for driving the programme, it supported it, recognising that it could underpin schools in both remodelling and implementing the National Agreement.

The programme was relatively short, but had significant impact. It created financial stability in those schools in greatest difficulty through the implementation of recovery plans in partnership with local authorities. It was also one of the pillars for building financial excellence within schools, including the introduction of a controlled checklist of good practice, which became obligatory and instilled better financial discipline in schools (although was later abandoned in 2011 by the Coalition).

A New Professionalism

A key underpinning principle of the National Agreement and the work of the School Workforce Partnership was the refocusing of teachers' time on the essential elements of their craft, i.e. teaching and learning and the enhanced deployment of their professional skills.

The Rewards and Incentives Group (RIG) emerged following the Agreement on Rewards and Incentives for Post-Threshold Teachers and Members of the School Leadership Group (referred to as the January Agreement) in January 2004 and was established with representation from teacher and headteacher unions, employers and the Department with a remit to:

- seek to agree any further changes to the STPCD and its accompanying statutory guidance;

- seek to agree other guidance and support for the implementation of these proposals;
- maintain a role in monitoring the impact of changes to the pay system;
- take forward the new professionalism agenda as set out in the Department's *Five Year Strategy for Children and Learners*;
- work through the remaining issues in relation to the existing agenda;
- look for further simplification of the pay documentation.

The Government's *Five Year Strategy for Children and Learners* proposed that "career progression and financial rewards go to those who are making the biggest contribution to pupil attainment, those who are continually developing their own expertise, and those who are helping to develop expertise in others".³⁴ This sat well with and built on the aims of the National Agreement and RIG's agreement in January 2004 that "the highest rewards for classroom teachers should be awarded for excellence."³⁵

RIG broke new ground in relation to the Government's engagement with the unions and employers, which was particularly apparent in its dealings with the independent School Teachers' Review Body (STRB). For the first time in the history of the STRB, the Government agreed to give joint evidence together with employers and the unions and to make joint representations on the full range of teachers' pay reform matters. Joint evidence was presented to the STRB on seven occasions between 2005 and 2010.

In RIG's joint evidence to the STRB in May 2005 it set out its views on what became known as the New Professionalism which, broadly speaking, came to encompass performance management, CPD, pay and rewards, new professional standards for teachers and newly qualified teacher (NQT) induction. It stated that, "underlying the new teacher professionalism is the aim that professional development is an ongoing part of the everyday activities of a teacher rather than a separate activity which adds to the workload of teachers."³⁶

Key to the delivery of the new professionalism would be the development of a coherent national framework of professional standards and the refocusing of teacher

³⁴ *The Five Year Strategy for Children and Learners*, DfES, July 2004

³⁵ *The Agreement on Rewards and Incentives for Post-Threshold Teachers and Members of the Leadership Group*, paragraph 6 (2004)

³⁶ RIG, *Joint Evidence to the STRB*, May 2005

appraisal as teaching and learning reviews. Following on from this, in June 2006, the Department issued a consultation on revised arrangements for teachers' and headteachers' performance management, positioned as a key part of creating the new professionalism for teachers described by RIG in its May 2005 evidence to the STRB. The aim of the new arrangements were to help "schools to create a culture in which teachers feel confident and empowered to participate fully in performance management; and where there is ongoing professional dialogue about performance and how to develop it."³⁷ To assist in that culture change, RIG commissioned the Training and Development Agency's Development Directorate (TDAD – formerly the NRT) to provide ongoing help to schools to implement the revised performance management and build on the arrangements used to support workforce remodelling.

This new, more rigorous form of performance management built discipline and greater transparency into the system. According to Chris Keates: "The development of a national framework of professional standards for teachers was the first key element of a programme of work which was creating professional entitlements for teachers for the very first time. The developmental and progressive framework of standards gave teachers the tools to plan their careers and to develop and grow professionally. And it enabled teachers to unlock access to pay progression whilst continuing to recognise the important contribution of classroom teaching."

Performance management was transformational in schools' working practices. It can also be linked to the notion which underpinned much of the School Workforce Partnership of "something for something", with pay being linked to performance, and performance management being a critical vehicle for teachers to progress their careers and move to higher levels of pay.

In 2010, the National Foundation for Educational Research published a report evaluating the extent to which new professionalism had been introduced in schools, and its impact on teaching and learning.³⁸ It noted that Ofsted had found in 2006 that making the links between the different strands of new professionalism was important as it had been shown that schools placing CPD at the heart of improvement planning, and integrating performance management,

self-review and CPD into a coherent cycle, raise standards and improve teaching.

Overall, the report concluded that schools were implementing the new professionalism and that it was making a difference to teachers' and headteachers' working practices. The majority of respondents agreed that as a result of new professionalism "they or teachers in their school were now able to exercise their own professional judgement in their teaching and learning practices, gave more recognition to the importance of a good work-life balance, received the recognition they deserved for the contribution they made for teaching and learning, and had been more able to access pay progression opportunities." These findings **must** have given a satisfactory glow to those sitting around the (albeit, at the time of publication, dissolved) RIG table.

The Last Days of the Partnership

If the National Agreement was the glue that bound the School Workforce Partnership together, what would happen once the bulk of the implementation was complete? Would it dissolve or evolve to respond to new challenges?

There are many theories about the various stages in the evolution of a partnership, but most agree that whilst the early stages involve finding common ground, building infrastructure and focusing around core activity, the later stages present an opportunity to develop the partnerships and apply the lessons learned to new challenges and new agendas.

For the School Workforce Partnership, that shift probably came around the time that Ed Balls took over the DCSF in June 2007. In Ed Balls the social partners had a Secretary of State who was willing to listen and happy to explicitly refer to the social partnership. The Government was also keen to look more closely at what other services could be delivered through a remodelled school – continuing discussions around extended services and the development of new roles such as Parent Support Advisors and personal tutors. Whilst the partners were all broadly positive, concerns remained on the part of the teaching unions about the role of teachers in the delivery of extended services, thus prompting calls for detailed guidance; whilst the headteachers were more interested in the Government setting a high-level approach and outcomes, and

³⁷ *DfES Consultation on Performance Management*, June 2006

³⁸ *Making the links between teachers' professional standards, induction, performance management and continuing professional development*, Walker et al, NFER

leaving them to decide how they might best be implemented.

At the same time there were still some issues around National Agreement compliance and from 2008 onwards a sense of wanting to consolidate what had been achieved. The sticky issue of what constituted "rarely cover" still needed dealing with due to headteachers' differing interpretations of what constituted an "unforeseeable" circumstance when teachers might be asked to cover for an absent colleague. The headteacher unions were keen to pin down Leadership and Management, and Headship Time, which were variously interpreted.

The TDA was still reporting on implementation to the partnership on a monthly basis and this went right down to individual school level. A problem with Nunthorpe School where the headteacher was refusing to comply with the National Agreement and quite happy to argue that with the Secretary of State, led to statutory provision allowing the Secretary of State to intervene and sack a governing body. On this occasion, that wasn't necessary due to the intervention of the Government Office, but it demonstrated the support for the social partnership at the highest level. And in January 2010, the ASCL Act enabled local authorities to issue an initial written warning notice in cases of non-compliance, which could then be followed by other types of intervention.

Over the last two years there was a significant focus on the School Support Staff Negotiating Body and the efforts to secure a pay and conditions framework equivalent to that of teachers. The teacher and headteacher unions were supportive of this, but needed something more directly relevant to get their teeth into. The Government was more than willing to present to them on wide-ranging aspects of policy, but without it being part of an agreed work programme it was harder for WAMG to exercise as much leverage. It did, however, give them good oversight of developments, in particular, oversight of the Prime Minister's office views on education.

There was also still much work remaining around effecting a culture change which moved from one of compliance to a culture of acceptance. There were also some significant pay and conditions issues, an agenda around teachers' contractual entitlement to CPD and a discussion around moving towards specific weekly limits on workload of the type initiated in Scotland. So the agenda was no less full, but it was perhaps more complex than in the earlier years of contractual change implementation.

As the General Election got ever closer competition was escalating between those that were in the social partnership and the NUT. So, for example, the NUT issued guidance around rarely cover. Inevitably, individual unions began to think about positioning post-election. Being in the School Workforce Partnership had been a strong sell to potential members. If the partnership was dissolved by a new Government, what would take its place?

In Opposition

It would be difficult to write about the School Workforce Partnership without recognising the role played by both internal and external opposition. Of course, the NUT was the most visible opponent, but many of the signatories also had to face down opposition from within their own organisations. Both had significant impact.

The NUT had already refused to sign the National Agreement some time before the Partnership was officially launched on 15 January. What the partners did not realise was that the NUT would stage a media raid on the launch event by inviting journalists to dinner and telling them that the Government was planning to announce an agreement that would allow 1 teacher to 90 children in the classroom. In retrospect, the publicity around the NUT's proclamation probably generated more press for the National Agreement than it would have garnered on its own, but more significantly it set a very clear line in the sand. It created a "them and us" psychology between the social partners and the NUT, which would also see the latter excluded from all talks with Government for the duration of the partnership.

Partners agree that the NUT's refusal to sign up was a disappointment, but opinion is divided as to whether it actually had a rather more positive than negative result. Charles Clarke feels that "if the NUT had been in, it [social partnership] would have moved to a better place" and Brian Strutton agrees that "I think it would have had a better chance of surviving and history would have been very different."

There is no doubting the importance of the Government's decision to go ahead. Chris Keates says "It was a significant decision to go ahead without the NUT and then exclude them from discussions. It was a courageous decision and a huge moment in the development of the Social Partnership."

Heath Monk, who was the day-to-day liaison between WAMG and the School Workforce Unit, feels that the NUT's isolation had an upside: "We would have

preferred it if everyone had signed up, but the fact that they didn't worked well for the Social Partnership. Once the rift happened there was so much invested in WAMG that no one would let it fail," adding "I'm not sure if the NUT had signed up that it would have lasted, because the issue around support staff would have continued to get in the way."

Partners did not necessarily have an easy time within their own organisations either. Even at the NASUWT, the most vocal and largest proponent of the National Agreement, it was not always straightforward. Chris Keates describes how: "There was opposition from within the NASUWT Executive – some were uncomfortable with this new way of working – and there was some opposition at conference." What inevitably brought sceptics round was when the promised benefits started to be realised.

Nigel Carr agrees that there were wobbles every conference season, but that opposition was important in making sure it was a democratic discussion and that partners were keeping in line with what members wanted. Mary Bousted had to speak against conference motions on several occasions, because "It was a completely new way of working with unions around the table taking responsibility for finding solutions to the issues that faced us. If we hadn't then decisions would just have been foisted on us."

Christina McAnea describes how the mixed views at Unison about getting round the table meant they had to go at a slower pace "Resistance to partnership from our local government section meant that we were always slightly on the back foot about what we could commit to and what we could push for. I feel we could have got more concessions early on if I'd had the backing to go for it, but managing internal resistance meant we had to go slowly."

PAT also had some reservations – particularly around the use of teaching assistants in what had been seen as teaching roles. They faced a backlash from members who were supply teachers and felt that they were being done out of a job and some reservations from TA members who were uneasy about the idea of doing some of the tasks proposed. "So we had a battle to fight both on behalf of our members and with our members," says Deborah Simpson.

Even within the Department itself there was some resistance. Officials in the Standards and Effectiveness Unit had concerns around the use of support staff in primary schools, but the fact that the Agreement had strong Ministerial support and that it had headed off the possible strikes meant it had support; albeit sometimes reluctant.

The most important point perhaps is that opposition, from whatever party, kept the partners on their toes and ultimately made them stronger. A lack of strong opposition can mean that arguments are not well articulated and the pace of change moves more slowly. The fact that partners were having to persuade people on a daily basis gave the Partnership confidence to tackle some of the most challenging issues. It was difficult at the time, but they had developed a robust mechanism, which made them stronger and gave power to their arguments. Likewise, a vocal opponent, who found media support in the *Times Educational Supplement* – for whom, after all, a lack of conflict is not news – meant that the partnership had to put forward strong arguments, produce sound, reliable guidance, have a clear delivery strategy and face down opposition with a united front. And that is what it did.

IMPACT AND OUTCOME

Impact Measurement

Before addressing the legacy and outcomes resulting from the School Workforce Partnership and the implementation of the National Agreement, it is worth considering how this can best be measured.

During the life of the NRT, and later the TDA, data on implementation of the contractual changes was collected at school level and at local authority level, processed through a sophisticated Continuous Quality Improvement (CQI) process, based on a standard traffic light system and, where necessary, escalated to the social partners and, in extreme circumstances, to Ministerial level.

This data gathering, principally through Local Authority Remodelling Advisers and Regional Advisers, was complemented by local WAMGs. The WAMG structure was replicated at local level, often arising out of pre-existing Joint Consultative Committees (JCCs) which, as long as they signed up to terms of reference, often included the NUT. Local WAMGs conducted surveys to see how the changes were being implemented and this gave a strong sense of local ownership. Governors were often active on these groups and they became an effective troubleshooting forum that led to better relations at local level. In some places they still exist.

The data monitoring was efficient, effective and provided the social partners and the Government with a very sophisticated level of information, which enabled them to see in great detail how the reforms were being implemented. The CQI process drew admiration from visitors from other areas of Government, including the Prime Minister's Delivery Unit, when they were invited to visit the NRT's "war room", because of the level of detail being gathered and the processes in place to address any issues.

The level of implementation across the system, then, was reasonably easy to measure. What is harder to gauge is the short- and long-term impact in schools and across the wider education landscape.

A standard methodology is to take the original objectives and assess to what extent they were achieved, so in this case: raising standards and tackling workload. There are two widely accepted reference points for this: the Teacher Workload Diary Survey (for workload) and the Programme for

International Student Assessment (PISA) (for standards), as well as Ofsted and other external evaluators, such as the National Foundation for Educational Research.

These sources will be referenced in the sections below and elsewhere, but equally important are the qualitative judgements of both the social partners and others working in and around schools at this time. They have been consulted at length and their views form part of the assessment of the impact, outcomes and ultimate legacy of both the Partnership and the National Agreement.

Legacy: The Education Landscape

There are a number of outcomes of the School Workforce Partnership that are widely, if not unanimously agreed; others that meet with less universal approbation. One thing that is generally accepted is that as a result of workforce reform the shape of schools and their staffing structures has changed and by 2015, five years from the end of the Social Partnership, there is no sign of a rolling back from that. And, despite some pre-election questioning of the value of support staff by shadow Conservative ministers, the universal view is that headteachers really value the mixed workforce. Judith Bennett, Chair of Governors of a primary school, feels that: "For primary schools it was transformational and still is. It's made a big difference to the way that children can be taught. Teaching Assistants are more professional, which gives teachers more weapons in their armoury to support teaching and learning, and brings significant benefits to pupils."

There also seems to have been a correlation between the introduction of the National Agreement and teacher recruitment becoming easier. Views are mixed as to exactly why this is, but there is widespread acceptance that the National Agreement led to an increase in the professionalism of teachers and a reduction in workload. This was backed up by Ofsted,³⁹ which found that: "The survey that formed the basis for this report found that the reforms have created a revolutionary shift in the culture of the school workforce. Teachers' time and work are now focused more directly on teaching and learning and the substantial expansion of the school workforce at all levels is allowing the schools to extend the curriculum, provide more care, guidance and support for

³⁹ *Reforming and Developing the School Workforce*, Ofsted, October 2007

pupils, and use data more effectively to monitor pupils' progress."

It also found that: "Provision for teaching and learning had improved in all schools in the survey as a result of a reduction in teachers' administrative tasks, limits on covering for absent colleagues, time gained and guaranteed time for planning, preparation and assessment."

Mary Bousted is emphatic that "the professionalism of teachers has greatly increased". Deborah Simpson agrees that "The National Agreement refocused the vision for teaching and learning in schools and refocused teacher professionalism. It created a more confident self image for teachers," while Heath Monk has "a sense that teachers are having more discussions about teaching than they did ten years ago."

Dame Pat Collarbone believes that this professionalism extended across the whole school team: "Remodelling meant that people had to learn to work together to solve their own issues. It brought a liberation and creativity that just wasn't there before. We have a profession that is more empowered to work out its own solutions." Chris Keates agrees, saying that: "The Social Partnership was a recognition of the power of the centrality of the workforce to deliver high quality education and so you have to give them the tools to do that. The non-pay conditions are inarguable."

Nonetheless, the long-term impact on teacher workload is far from conclusive. According to the Workload Diary Survey, there was definite downward pressure on workload during the life of the partnership, although it had plateaued by 2009. It has now gone back up again – although the measurement methodology has also shifted. However, those consulted in the course of this report share the view that this increase in workload is due to new demands, chiefly curriculum changes, accountability changes and Ofsted, which have expanded to fill the breathing space created in teacher workload by the National Agreement. This view is supported by a DCSF research report, which found that "teachers and headteachers in all sectors said that having PPA time had impacted positively on workload and work-life balance", but that "interviewees in all phases claimed that this impact was lessened by various government and school initiatives which added to workload."⁴⁰ Nonetheless, the legacy of PPA, the removal of administrative tasks and limits on cover remain.

The impact on support staff was arguably as great as the impact on teachers. Indeed, Brian Strutton believes that: "The Social Partnership and the remodelling period had a greater impact on support staff than on anyone." There is no doubting the huge growth in support staff numbers, the professionalisation of their roles and the raising of their profile, but there are some questions around the long-term legacy for support staff. Because the desired national terms and conditions for support staff were never achieved, GMB is seeing many instances of the support staff gains being lost and pressure on them to operate at the same level with reduced pay.

Christina McAnea agrees that, although the increase in number and range of support staff was a good thing, there were and are instances of exploitation. She states: "We needed to officially monitor the impact of the National Agreement on support staff, but this was never done. It was all about the impact on teachers." However, she feels that it still helped change the view that support staff are a homogenous group and that they are now seen as valuable members of the school team.

In the DCSF research report, support staff were generally positive about the changes to their work in terms of gaining new skills, taking on responsibilities, interest and enjoyment of their work, and their status. However, it also found that the workload and stress levels of support staff had increased.

Officials from within Government and union representatives agree that the impact in terms of union/Government relations was significant. It showed that it is possible for unions and Government to sit down together constructively and the short- and medium-term legacy was one of industrial relations harmony. Brian Lightman of ASCL sees this way of working as the School Workforce Partnership's defining legacy: "It created a model of negotiation of unions working with Government. It was unique and ambitious, but worth working for. It created a platform for further change."

David Miliband agrees: "It shows that common interest can trump sectional interest; that long-term gain can trump short-term posturing. It shows that teacher unions can be responsible partners and that Government can be an effective partner too."

The flipside of this is that Hilary Emery believes that the loss of the Social Partnership has made everything more vulnerable, and for the DfE and the unions that

⁴⁰ *Aspects of School Workforce Remodelling – Strategies used and Impact on Workload and Standards*, DCSF-RR153

collaborative way of working has ceased to exist. She says: "It needs an appetite from Government to really want to build on the platform for change created by the partnership."

The impact on standards is probably the most inconclusive in terms of legacy. Dame Pat Collarbone believes that it is always difficult to provide a causal link between any initiative and attainment, but that standards probably did not rise as it had been thought they would. Mary Bousted agrees that "there is no clear evidence that standards did anything other than plateau, but I think that's more about the effects of literacy and numeracy strategies, and other ongoing changes." There is some evidence that suggests that support staff have had a negative impact on standards (an Institute of Education report is often cited),⁴¹ but this is not universally accepted and different reports provide contradictory evidence. Chris Keates believes that the National Agreement did have a positive impact on standards and much of the research evidence from Ofsted and from academic bodies backs this up, with Ofsted's 2007 report finding that the schools surveyed believed strongly that standards were rising. Brian Lightman agrees, saying: "The National Agreement did raise standards whatever you hear now. The quality of teaching in this country has changed beyond recognition."

Legacy: For Individual Unions

One thing that all partners agree on is that their participation in the School Workforce Partnership changed the way their individual unions operated in different and often fundamental ways.

Chris Keates, one of the longest-standing leaders of any of the education unions, who steered the NASUWT's journey through the Social Partnership and was widely accepted to be its strongest and most vocal advocate, is clear that it changed the way in which the NASUWT worked for the better: "It made us articulate better what we were for and not just what we were against. This was a very new and important dimension."

She says: "It brought about a willingness to engage for the NASUWT – an approach where we try to be part of the solution not part of the problem." She is also pleased that as their contribution to the School Workforce Partnership has been widely recognised, it has demonstrated that they are a union capable of leading the profession.

Mary Bousted has been upfront about some of the challenges she faced from within her own union, but says that the legacy for ATL has been equally transformational: "By the end we had achieved a change of culture within the union because everybody could see that we had changed things – giving teachers the tools to refocus on teaching and learning, and their professional role and responsibilities. The Social Partnership gave a voice to teachers through their unions. We were able to be a good social partner, but retain our independence."

As the smallest of the social partners, being part of WAMG was significant for what was then PAT. Deborah Simpson describes it as "making us a full player on the national stage – maybe a bit player, but a player nonetheless. It made a difference for us and our members, giving us a credibility that we still have and gaining us new members."

For the support staff unions, it brought about fundamental structural changes. Unison now has separate structures for support staff, and membership continues to grow. It also changed a lot of its local government branches, making them more aware of what happens in schools than previously.

For GMB, the whole nature of its membership profile has changed. One in five of its members now work in a school (previously it would have been about one in 20); its "typical member" is now a part-time woman working in a school and Brian Strutton describes how that gender shift also created a behavioural shift in its membership, as it was previously characterised as an angry, male-dominated union. It has also changed the way the union works: "We have changed the way we do business, the way we communicate – our internal dynamics have changed."

Legacy: Union Collaboration and Relationships

Collaboration was a fundamental tenet of the School Workforce Partnership and between 2003 and 2010 partners were meeting on a weekly basis, so inevitably people got to know each other very well and strong relationships between the various parties developed. Did this leave any legacy for ways of working between the unions once the Partnership itself was dissolved? The unanimous consensus seems to be "yes".

Brian Lightman says: "A key outcome was more constructive relationships between the unions. We became more aware of different perspectives and

⁴¹ *Deployment and Impact of Support Staff Project*, Institute of Education, August 2009, Peter Blatchford et al

we've been able to avoid strike action and deflect disputes because of that cooperative relationship. People knew each other very well, so there was very strong communication and those relationships have lasted."

Mary Bousted agrees: "The unions generally work well together now and we are good at producing joint guidance. It's raised our ability to communicate with members, honed our negotiating skills and improved the quality of our advice. It also gave us a better understanding of how Government works."

Before the Social Partnership, it was unusual for support staff unions to be consulted on decisions that

would affect schools and their staff. Being round the table with colleagues changed all that. As Brian Strutton says: "Teacher and support staff unions are happy sitting beside each other and that would never have happened 15 years ago".

Although only on the periphery of the partnership, there is a strong legacy for governors too. Judith Bennett says: "We were very well-received by the social partners. I made a lot of good working relationships through it and our organisation did too. Working with the NRT on guidance made us players (even if we were in the second division!) and geared us up to go on to branch out in other directions."

WHAT NEXT?

The School Workforce Partnership endured from 15 January 2003 until it ended in May 2010, following one of the very first policy decisions of the new Coalition Government's Secretary of State and Minister for Schools. Was social partnership simply the result of a particular moment in time?

The following pre-conditions, principles and ways of working have been extrapolated from interviews with key players and together build up a picture of what constitutes a social partnership model, together with consideration of how that model might be reapplied given the very different education landscape of 2015.

Pre-conditions for Success

One of the pre-conditions which causes some debate is whether a reasonable, perhaps even generous public purse is necessary for a social partnership to be successful. Christina McAnea feels that its inception was possible, at least in part, because the Labour Party was putting money into public services and it was a period of expansion. This meant that: "It felt like the school workforce partnership was not all about saving money, but about genuinely trying to improve things for pupils and teachers." She also feels that the economic downturn from 2008 played a big part in the lack of progress with support staff pay and conditions, because money to support it wasn't there.

This is a commonly held view, but Caroline Coles puts forward a different one – that "austerity is the best time for partnership working, because you are forced to look for different ways of doing things and pooling resources." This is a perspective which has many advocates in the cultural sector, where cuts in public funding can lead to the creation of the most innovative work.

Perhaps, though, it is not about the money per se, but about the ability to offer something; to strike deals. A Government partner that is not willing to accede any power or make any concessions is not really a partner at all. Whilst they may effectively be *prima inter pares*, Government must be prepared to play as an equal partner, negotiating with colleagues to find the best collective solution.

What, then, is absolutely crucial is the backing and enthusiasm of Ministers, in this case within the Department for Education, but also a wider commitment across Government. There was some nervousness at the centre and David Miliband had to do significant lobbying in No 10 and No 11 Downing

Street to get the go-ahead for the School Workforce Partnership. His cause was undoubtedly helped by his former role in the PMDU and his being seen as very New Labour, but he and Charles Clarke were also careful to maintain the partnership's positioning as delivering on a standards agenda and therefore a New Labour education agenda. Subsequent Ministers all brought their own perspectives and priorities to the partnership, but their enthusiasm and support was constant. Alongside Ministerial support, it is vital that union General Secretaries are fully committed – ready to take some risks, dedicate resource and face down any internal and external opposition.

Equally essential is a burning platform, a reason for coming together, or what Dame Pat Collarbone calls "a good strong why", in this case to address teacher workload, the perceived recruitment crisis, prevent an industrial relations crisis and drive up standards. She says: "As leaders of the profession, the unions have a strategic role to play, but it can't just be a conversation. It must be about doing. And doing something very important." Heath Monk echoes this, saying: "It needs something that means failure is not an option – a common enemy or a burning platform; a sense that what unites the partners is more important than what divides them."

Principles

There are a range of principles, which are critical to underpin an effective partnership, but number one on the list is trust. Alan Johnson says: "It starts with trust, but you won't get all the way there immediately. Trust needs to be earned. You just need enough to kick things off and then it builds. There needs to be enough trust and confidence that you can get things going without necessarily having all the detail agreed."

Heath Monk feels that the School Workforce Partnership had this: "There was a high level of trust. We knew that what partners said in meetings is also what they would say to members. So in the same way we wouldn't go away and change guidance outside meetings."

It also has to be truly democratic. For the School Workforce Partnership, operating under the principle of "nothing is agreed until everything is agreed", this made for a long and sometimes painful decision-making process, but it was critical if all partners were to feel able to go out and sell decisions to their Executives and members that their perspectives were accurately reflected.

Confidentiality was also a fundamental principle. All partners agree that it was crucial. Alan Johnson says: "Confidentiality was incredibly important – you had to be open and frank with no surprises. There were things we shared on both sides that could have derailed things, but they didn't because the spirit of honesty was there." Chris Keates agrees that confidentiality was critical and, although it created some challenges in terms of managing members, was something all partners recognised and stuck to.

In order for all partners to remain on board, there needs to be something in it for everyone, and what David Miliband refers to as a "positive sum game". So, for the teaching unions it was about better conditions for their members, for headteachers it was about retaining good staff and having the opportunity to reshape their workforce, for support staff it was about the potential for recognition and better roles for their members, and for the Government it was about tackling the recruitment crisis, raising standards and preventing industrial unrest. As Chris Keates puts it: "Everyone needs to have success and everyone needs to make a difference."

Nonetheless, whilst all partners would have individual reasons for being around the table, this needs to be subservient to the collective reason for coming together and the shared vision. Heath Monk says: "It needs a very clear vision or goal – it can't be just a talking shop." There also needs to be a recognition by partners that the vision and direction of travel will be set by Government, but at the same time it is critical that that political sponsorship is continuous and that partners know that.

David Miliband believes that it is important to expand the vision beyond conventional thinking: "Eisenhower said, 'If you've got a problem you can't solve, expand it'. That's why we brought the support staff unions in – the vision must expand the game." The problem of teacher workload and recruitment could not be solved by looking at the workforce in the traditional way, so the Government and its partners needed to look at reforming the existing workforce and shaping a new one.

Christina McAnea says that for any partnership to be effective there needs to be "a shared understanding of what you are trying to achieve, an understanding of the workforce implications and a shared commitment to work through them." Charles Clarke agrees that: "A genuine partnership between employers and unions identifies a set of goals in the public interest that they are both ready to sign up to.

There needs to be a shared agenda about what the Social Partnership is trying to achieve."

Brendan Barber feels that there needs to be a "genuine opportunity to exert influence on decision-making" and Hilary Emery agrees that partners need to "believe that they are being listened to and that they can bring things to the table."

She also believes that: "Relationships were the absolutely critical factor. There were high levels of respect around the table and a belief that what we were doing would make things better for members and better for children and young people." David Miliband agrees that the partnership was made up of "personal relationships based on integrity". That is why there was a huge amount of relationship-building work put in by the secretariat and officials between meetings.

Ways of Working

Shared principles that underpin a partnership are crucial, but at a practical level there are myriad things that make a difference to success or failure.

Anita Jermyn, representing NEOST, feels that the partnership needs to have very clear, agreed Terms of Reference, objectives and remit. Brian Lightman agrees that any future partnership would need "a clear set of aims and objectives; an agreement about who will sign up; a commitment from all parties to invest in it and an agreed, timebound forward-planning agenda." Brian Strutton endorses the idea of a formal underpinning – a constitution or agreement about what everyone is there to do.

Others agree, but where there are differences of opinion is around how tightly scope needs to be defined. Heath Monk says: "I'm not sure we were clever enough about defining the scope. Once the National Agreement was largely 'done' it became more tricky to focus and lack of focus can lead to disengagement. But it was so new, we really didn't know what we were dealing with at the start."

Patrick Roach agrees: "We developed a set of protocols that emerged as part of our working practices, but if we had tried to anticipate these in January 2003, we would probably have been way off the mark as they emerged through doing."

In fact, these protocols were captured in a letter that went to the NAHT in January 2007 when they were seeking re-entry to the partnership. This set out the expectations on all partners with the key emphases being on confidentiality and consensus, perhaps the most important point being: "The partnership works

by consensus. In practice this means that everybody has to make compromises in the interests of making progress. There are no votes, no vetoes. Discussions are undertaken on the basis that we are looking for agreed solutions."

Hilary Emery feels that the scope needs to be clearly defined, but with "a recognition that it will evolve and that there will be a growing remit." John Bangs has been critical of the tight focus of the School Workforce Partnership, saying that: "Although the National Agreement brought people together, it got in the way of a true social partnership. Or at least the way that the National Agreement had been locked into the fine detail of the School Teachers' Pay and Conditions Document – this set a pattern of working on the micro-detail, rather than the strategic vision."

But Charles Clarke believes that a period of tightly managed focus is essential to then enable partnership to expand into a wider remit once trust has been built and embedded.

Brian Lightman supports this view, believing that: "There is a role for a wider social partnership in order to build on progress around school improvement, acting as a forum for unions to be able to feed into the early stages of policy development."

One thing everyone agrees on is that the partnership needs appropriate resource to support it in order that it can deliver effectively. WAMG had a high level of support from the NRT and later TDA, which provided it with the data and information from the field, which meant that the partners could deliver appropriate support and guidance.

There is an acknowledgement that the partnership was very resource-hungry and that over time the frequency of meetings would probably lessen, but nonetheless a strong secretariat, dedicated to follow-up and preparation, is essential and should not be underestimated.

Brian Strutton believes that "social partnership needs to be partly principle and partly detail. Everyone needs to know where they are going, but also how they are going to get there. However, sometimes WAMG got too caught up in the delivery, and strategy and delivery became too intertwined. But hindsight is a wonderful thing!"

Partners agree that there needs to be secure and clear accountability. Roles and responsibilities need to be transparent and this needs to be communicated at all levels. Within the School Workforce Partnership, there

was an agreement that in the case of strong disagreement the Minister for Schools would be the final arbiter. This was rarely used, but it was important to have this in place.

The Challenge of a New Education Context

There is little doubt that the education landscape is a very different place in 2015 to what it was in the early 2000s. The system is much more fragmented with the increase in the number of academies and the advent of free schools, meaning that the local authority is no longer the only employer. Many of the kinds of middle-tier support organisations such as BECTA and NCSL have all but gone and it is difficult to have any national strategies.

Additionally, the whole social structure of the population has changed – it has increased and become even more culturally diverse, leading to more complex populations within schools.

Given this very different context, would it be possible to create anything like the School Workforce Partnership again and, if so, what would need to be different?

Mary Bousted believes that the Social Partnership was a particular moment in time, with a topdown Government that believed in topdown reform: "Because of the devolution of the school system, governments have to be less command and control. The deregulated agenda is now shared by all three main political parties, so any future partnership would have to be about more general issues – more 'nudge theory' than 'this is how you do it'. You can never put the genie back in the bottle."

One thing that is clear is that any future partnership would need to buy in from a wider group of stakeholders, because the employer landscape is so diverse, but that support from central government would be just as important. New delivery streams would need to be identified, as everything could no longer be channelled through the local authorities, and any guidance would need to work in whatever the school setting. Might we be looking at a more evolved, devolved model?

It is likely, then, that a future social partnership would look different, but there is no reason why it might not feel the same. As David Miliband says, "The Social Partnership shows what's possible. If you frame the question right, you can get public service trade unions to be productive partners. If you never forget the educational interests of children, you can get things done."

*Raising standards
and tackling workload:
a national agreement*

TIME FOR STANDARDS

*ATL, DfES, GMB, NAHT, NASUWT, NEOST, PAT,
SHA, TGWU, UNISON, WAG*

15 January 2003

1. INTRODUCTION

1. This document represents an historic national Agreement between Government, employers and school workforce unions to help schools, teachers and support staff meet the challenges that lie ahead. It promises joint action, designed to help every school across the country to raise standards and tackle workload issues. Action will take place across England and Wales and will take account of the different circumstances from school to school.

2. Proposals in this Agreement for changes to the School Teachers' Pay and Conditions Document will apply equally to teachers in England and Wales. As set out in this Agreement, the Welsh Assembly Government supports the need for school workforce reform as a means of delivering contractual change and, in line with the devolution settlement, will determine how this is best achieved in Wales, in partnership with relevant employers and unions.

Context

3. We have the best generation ever of teachers and headteachers, as evidenced by Ofsted and Estyn – and they are supported by an expanding and highly effective cadre of support staff. Pupils are working harder than ever before and standards of achievement are rising. But the education service cannot afford to stand still. We need to find new ways, for the 21st century, of helping schools to realise the potential of all our children and to ensure the nation is competitive in a rapidly changing world.

4. As the Government's pamphlet "Professionalism and Trust" explained, the next phase of raising standards will place greater demands on teachers than ever before. There will be increasing emphasis on the pupils who require the greatest help and for whom teachers will need to prepare more differentiated material.

5. Teaching is a profession used to adapting to the demands of the economy and society. Before the Second World War, many jobs did not even require basic literacy. By 2010, more than 80% of new jobs will require qualifications of NVQ level 4 or above. This will pose new, even greater challenges for the school workforce.

6. Many teachers are already leading the way in adapting to these new demands. They are using informed professional judgement to create new models of teaching and learning that will benefit all schools and ensure that teaching is recognised for what it is: an innovative and expert profession. But teachers will not be able to make further progress on raising standards for pupils unless we can free them from the shackles of excessive and inappropriate workload.

7. The nature of that workload was made clear by the independent study by PricewaterhouseCoopers (PwC). Rising demands on teachers' time have added increasing non-teaching burdens: two-thirds of a teacher's time is now spent on activities other than teaching. The profession has suffered recruitment and retention difficulties as a result.

8. Following the PwC report, the School Teachers' Review Body made a series of proposals for reducing excessive workload, including through changes to the teachers' contract. In responding to these proposals, the Government has entered into detailed discussions with national partners and through the "Time for Standards" package, with the aim of reaching Agreement on the nature and implementation of reforms that would turn the tide on teacher workload.

9. This Agreement is intended both to raise standards and to tackle teacher workload.

The Signatories to this Agreement recognise that it is not possible to address one part of this equation without addressing the other. The contractual changes set out in this document will not be delivered unless schools deploy more support staff in extended roles, as a means of releasing the extra time for teachers and reducing their workload.

The way ahead

10. The Agreement includes a seven point plan for creating time for teachers and headteachers and therefore time for standards:

- i. Progressive reductions in teachers' overall hours over the next four years. This objective will be promoted by all the partners and progress will be monitored and audited, including at school level;
- ii. Changes to teachers' contracts, to ensure all teachers, including headteachers:
 - Do not routinely undertake administrative and clerical tasks;
 - Have a reasonable work/life balance;
 - Have a reduced burden of providing cover for absent colleagues;
 - Have guaranteed planning, preparation and assessment time within the school day, to support their teaching, individually and collaboratively;
 - Have a reasonable allocation of time in support of their leadership and management responsibilities;

and that headteachers have dedicated time which recognises their significant leadership responsibilities for their school.

- iii. A concerted attack on unnecessary paperwork and bureaucratic processes for teachers and headteachers, including in England through the establishment of an Implementation Review Unit;
- iv. Reform of support staff roles to help teachers and support pupils. Personal administrative assistants for teachers, cover supervisors and high level teaching assistants will be introduced;
- v. The recruitment of new managers, including business and personnel managers, and others with experience from outside education where they have the expertise to contribute effectively to schools' leadership teams;
- vi. Additional resources and national "change management" programmes, to help school leaders achieve in their schools the necessary reforms of the teaching profession and restructuring of the school workforce; and
- vii. Monitoring of progress on delivery by the Signatories to this Agreement.

11. This plan is explained in more detail in sections 3 and 4.

12. This phase of reform will last until 2006 but further reform is likely to be needed beyond that. The parties to the Agreement will keep that issue under review.

Implications for support staff

13. This Agreement will also have significant implications for support staff and other professional staff in schools. Support staff will be increasingly recognised for the contribution they make to raising pupil standards. Bursars, administrative, technical and classroom support staff will all be important members of the school team.

14. These support staff will have access to expanded roles and improved choices and career opportunities, including proper recognition for existing responsibilities. The National Joint Council for Local Government Services' Working Party on school support staff is developing a national framework, including good practice guidance, covering the employment of support staff in schools.

Resources

15. Government has recognised its responsibility to provide additional resources in support of the Agreement. In England, this funding will ensure that the Government meets its manifesto pledge of at least an extra 10,000 teachers during this Parliament. It also estimates that schools will be able to appoint at least 50,000 extra support staff of all types during the same period. A detailed statement about resources in England is at appendix 1.

16. Schools start from very different points on this agenda and, depending on the level of new and existing resources available to them, will progress at different speeds in reforming their workforce. The contractual changes set out within this Agreement represent the minimum that schools will be expected to achieve – many will be able to go further and faster, and school leaders will be supported not only by resources but by a change management programme to help them lead the way to change.

Common action

17. Responsibility for promoting the Agreement lies with all the Signatories to it, so that:
- i. Government fulfils its responsibility for articulating the overall vision and strategy, for ensuring that sufficient resources are available to deliver reform of the school workforce, including through contractual change; and for freeing schools from bureaucracy and restraints that stifle innovation;
 - ii. Headteachers and leadership teams, in partnership with their governors, feel empowered and responsible for implementing the reforms, and make choices about local priorities through their spending decisions, in the context of relevant agreed national frameworks;
 - iii. Individual teachers and support staff are responsible for delivering high quality provision in support of the reforms;
 - iv. LEAs fulfil their existing duty to promote raising standards in schools. LEAs and Governing bodies are also responsible for ensuring that schools and school leaders get the support they need to implement reform;
 - v. The school workforce unions are committed to supporting the agreed reform process, by disseminating and promoting reform among their memberships, by celebrating achievements in schools and by working to secure the implementation of the Agreement in schools.

2. PRINCIPLES

18. The Signatories to this Agreement note that the Government has committed itself to invest in reform across the public sector based on four principles:

- i. Standards and accountability – the importance of a national framework of standards and accountability;
- ii. Devolution and delegation – the need for greater freedom and innovation at the front-line;
- iii. Flexibility and incentives – the role of greater flexibility and less demarcation;
- iv. Expanding choice – the assurance for parents that poor provision will be tackled quickly and effectively, and that for pupils the curriculum will allow them to develop in the best way.

19. In education, we have a shared vision of a world-class education system for all, where staff quality, motivation and deployment will help ensure the most effective approach to teaching and learning and the achievement by all our pupils of their full potential. We recognise that the substantial investment made by Government provides an historic opportunity to make progress towards realising this vision.

20. We consider that investment and reform must go together, as part of a successful partnership between schools, governors, LEAs, national partners and Government, so that we achieve ever higher standards in a future where:

- i. our pupils are supported by a wide range of teachers and other adults, working flexibly and differentiating their approaches to meet pupils' needs; and pupils are developing their own learning skills;
- ii. our teachers are using effective approaches to teaching and learning, are working in teams with other teachers and support staff; are committed to their own development and confident in exercising their professional judgement; and have higher status, proper remuneration and rewards, more responsibility and autonomy, more support and a better work/life balance, with teacher numbers growing to ensure effective implementation of reform;
- iii. our support staff are recognised for their contribution to raising standards and have more opportunities to take on extended roles in support of teaching and learning, supported by the right training, standards frameworks and new career paths, with remuneration that reflects their level of training, skills and responsibilities and with overall numbers growing as far as necessary to deliver reform;
- iv. our headteachers and leadership teams are committed to innovation, leading the change to new, more flexible, ways of working, and to better teaching not just within their own schools, but in partnership with other schools and institutions and with their LEA; are ensuring an appropriate work/life balance for their staff; and are embracing leadership responsibilities in the wider community; and
- v. our schools are providing a world class education, with well-designed and equipped premises and ICT facilities which can adapt to modern approaches to teaching and learning, and where there is flexibility and creativity in the approach to curriculum delivery and the timetable.

3. DELIVERING REFORM IN PRACTICE

21. To deliver these reforms, the partners have agreed a seven point plan as noted above.

A. Contractual change for teachers

i. Mainly administrative and clerical tasks

22. Teachers should not routinely do administrative and clerical tasks¹. The School Teachers' Pay and Conditions Document will be changed to reflect the provisions below.

23. Teachers should have support so that they can focus on teaching and learning and expect administrative and clerical processing to be done by support staff. Consequently, teachers should not routinely be required to undertake administrative and clerical tasks, including:

- Collecting money;
- Chasing absences – teachers will need to inform the relevant member of staff when students are absent from their class or from school;
- Bulk photocopying;
- Copy typing;
- Producing standard letters – teachers may be required to contribute as appropriate in formulating the content of standard letters;
- Producing class lists – teachers may be required to be involved as appropriate in allocating students to a particular class;
- Record keeping and filing – teachers may be required to contribute to the content of records;
- Classroom display – teachers will make professional decisions in determining what material is displayed in and around their classroom;
- Analysing attendance figures – it is for teachers to make use of the outcome of analysis;
- Processing exam results – teachers will need to use the analysis of exam results;
- Collating pupil reports;
- Administering work experience – teachers may be required to support pupils on work experience (including through advice and visits);
- Administering examinations – teachers have a professional responsibility for identifying appropriate examinations for their pupils;
- Invigilating examinations – see distinct provisions below;
- Administering teacher cover;
- ICT trouble shooting and minor repairs;
- Commissioning new ICT equipment;
- Ordering supplies and equipment – teachers may be involved in identifying needs;
- Stocktaking;
- Cataloguing, preparing, issuing and maintaining equipment and materials;
- Minuting meetings – teachers may be required to communicate action points from meetings;
- Co-ordinating and submitting bids – teachers may be required to make a professional input into the content of bids;
- Seeking and giving personnel advice;
- Managing pupil data – teachers will need to make use of the analysis of pupil data;

¹ The management of the support staff undertaking these tasks is dealt with separately in Section D of this Agreement.

- Inputting pupil data – teachers will need to make the initial entry of pupil data into school management systems.

24. The changes above will be promulgated in draft early in 2003, to take effect in every school from September 2003 at the latest, with schools working towards the changes as far as possible prior to that.

25. In addition, the following provisions will be introduced on exam invigilation:

- a) Teachers should not routinely be required to invigilate external examinations;
- b) Teachers should usually continue to conduct practical and oral examinations;
- c) Teachers may be required to supervise internal examinations and tests, where these take place during their normal timetabled teaching time.

26. The invigilation changes will be promulgated in draft early in 2003, to take effect in every school from September 2005 at the latest, with schools working towards the changes as far as possible prior to that. During the period to September 2005, schools should maximise the use of support staff as external examination invigilators.

ii. Reasonable work/life balance

27. All teachers should enjoy a reasonable work/life balance. The School Teachers' Pay and Conditions Document will be changed accordingly.

28. The wording for the pay document is to be agreed by the Signatories to this Agreement, but it is expected that there will be three types of change:

- a) Governing Bodies will need to ensure that the headteacher has an appropriate workload, in support of a reasonable work/life balance, having regard to their health and welfare;
- b) Headteachers will need to ensure that their staff have appropriate workloads, in support of a reasonable work/life balance, having regard to their health and welfare;
- c) Paragraph 67.7 of the School Teachers' Pay and Conditions Document will be amended so that any work beyond contracted hours is subject to the provisions of (b) above.

29. The changes will be promulgated in draft early in 2003, to take effect in every school from September 2003 at the latest, with schools working towards the changes as far as possible prior to that.

iii. Cover for absent teachers

30. There will be occasions when the qualified teacher normally responsible for a pupil's learning outcomes is absent from the classroom. Such absences need to be carefully managed to minimise the impact on teaching and learning for the pupil. We propose a number of linked steps on cover:

- There should be limits on the extent to which teachers at a school can be asked unexpectedly to cover for an absent colleague, with progressive movement towards a position where this should only happen rarely;
- The relevant sections of the School Teachers' Pay and Conditions Document will therefore be changed so that no teacher may be required to provide cover for more

than a set number of hours per year;

- Initially, the number of hours will be set at 38, but it should be unusual for most teachers to provide such a high amount of cover – schools should be providing downward pressure on the burden of cover;
- The contractual change will be promulgated in draft early in 2003, to take effect in every school from September 2004 at the latest, with schools working towards the change as far as possible prior to that;
- One of the first tasks for the Workforce Agreement Monitoring Group will be to establish the likely impact of this contractual limit and agree the process and timescale for achieving the shared objective that teachers at a school should only rarely cover for absent colleagues and interim targets towards achieving this.

31. These provisions do not cut across the role some teachers play where provision of cover is a stated part of their job description, and where their teaching load has been set to reflect this.

Strategies for managing cover

32. The strategies for managing cover will need to take account of the type of absence. For example, medium and long-term sickness, or maternity leave, will be more predictable and therefore more manageable than sudden illness. Pupil standards are paramount and such absence should be covered by a qualified teacher, possibly through a fixed term appointment, to ensure continuity and stretch in pupils' learning.

33. However, shorter absences can be handled in innovative ways. Reform is necessary to help schools deal with absence in a more managed way, enabling them to address the concerns raised recently by Ofsted about the effective deployment of supply teachers, and to give as much regard as possible to the need for pupils to continue to learn in spite of their teacher's absence:

- Schools should have access to a range of options for providing cover, including through supply teachers, high level teaching assistants, cover supervisors, "floating teachers" employed for the purposes of cover, and, where other options have been exhausted, teachers employed at the school;
- Where supply teachers are providing cover, they must, as far as reasonably possible, be actively teaching and not mainly supervising pupils. It is also important that they are managed properly and effectively, with regard to their teaching and developmental needs, and they should have appropriate access to CPD to maintain their standards of subject knowledge, pedagogy and pupil behaviour management. The good practices identified by the recent Ofsted report on schools' use of temporary teachers (December 2002) need to be adopted more widely and the poor practices eliminated;
- High level teaching assistants will be able to cover classes, and should be able to ensure that pupils can progress with their learning, based on their knowledge of the learning outcomes planned by the classroom/subject teacher;
- A new cadre of cover supervisors is needed to assist with teacher absence and relieve the pressure on qualified teachers to cover; cover supervisors will need appropriate training, including in pupil behaviour management. Detailed national guidance will be developed, including in relation to cover provided by staff without

QTS;

- The cover supervisor model is particularly valid where a teacher has been able to set work, or where pupils are able to undertake effective self-directed learning, for example within an ICT Learn Centre in a school;
- Cover supervisors and high level teaching assistants are for short-term absences only – as already implied above, they should not be used as the remedy for the medium or long term absence of a qualified teacher;
- Where qualified teachers at a school are used to provide cover, their PPA time must be protected.

34. As the improvements in teacher workload and pupil behaviour through current policies begin to take effect, we should see more supply teachers attracted back into permanent jobs in schools, part-time or full-time.

iv. Guaranteed planning, preparation and assessment time

35. To achieve the demands of the next phase in raising standards, teachers will need to take a more differentiated approach to the needs of their pupils. And yet they are already doing too much of their planning, preparation and assessment (PPA) at evenings and weekends, and in isolation from each other. While this cannot be changed overnight, the Agreement marks a turning point in carving out some guaranteed PPA time during the normal school day.

36. The School Teachers' Pay and Conditions Document will be changed to bring this into effect. Changes will be based on the following principles:

- The purpose of guaranteed PPA time is to enable teachers to raise standards through a combination of individual and collaborative professional activity; within that context, and subject to a national framework to be set out in guidance, it is for the teacher to determine the particular priorities for each block of PPA time;
- Guaranteed PPA time must not be encroached upon, including by any obligation to cover for absent colleagues;
- Guaranteed PPA should be set at the equivalent of at least 10% of a teacher's normal timetabled teaching time, where only teaching time within a teacher's 1265 contracted hours would count for these purposes, not other forms of pupil contact time;
- Guaranteed PPA time would count towards a teacher's 1265 contractual hours. This contractual PPA would be distinct from any planning, preparation or assessment undertaken outside the 1265 hours, as part of a teacher's professional duties. The latter will be subject to the new work/life balance clause outlined above;
- Guaranteed PPA should be timetabled time, in blocks of no less than 30 minutes duration, as part of the teacher's normal weekly or fortnightly timetable - i.e. a teacher should have a clear expectation of when they will be receiving their guaranteed PPA.

37. The 10% guaranteed PPA time is a minimum figure. Any teacher who already has a regular entitlement of more than this for planning, preparation and assessment should not be brought back to a 10% figure. However, guaranteed PPA would not be additional to

existing timetabled free periods.

38. The changes will be promulgated in draft early in 2003, to take effect in every school from September 2005 at the latest. Schools will be expected to work towards the changes as far as possible prior to that, especially where non-contact time is already part of the timetable.

Strategies for PPA

39. There will be no progress if guaranteed PPA time simply shifts other work into evenings and weekends. There must be a real corresponding reduction in the teacher's duties. Managerial, administrative and clerical tasks should be among the top priorities for reduction in the classroom teacher's workload, where such tasks do not require a qualified teacher to carry them out.

40. Moreover, some pupil contact time does not involve any teaching taking place e.g. pupil supervision, detention, assembly duty. These types of supervision can in principle be done by other adults – schools will receive guidance on how to secure this type of "remodelling" of how teachers spend their time.

41. However, for some teachers, remodelling of their time will not be enough, and further action will be needed to ensure that all of their guaranteed PPA is able to take place during the normal school day. For example, where a teacher has a high teaching load, this will necessarily mean some reduction to their timetabled contact time. In such a case, a teacher who currently has a full active teaching timetable of, say, 25 hours, might in future need to have reduced teaching time of as much as two and a quarter hours for their PPA. Schools will need to use a variety of means to release this time, adjusting timetables and deploying staff flexibly, to ensure high quality of teaching and learning for pupils.

42. By the same token, some teachers may be released from some tasks as a result of substantial remodelling by the school. For those who have been given lower teaching commitments to undertake these tasks, remodelling may provide the option of actually increasing their teaching commitments, and it is teaching which originally drew every teacher into the profession. In any event, there should be no assumption for these teachers that guaranteed PPA time will automatically mean less teaching time, if remodelling can displace some other activity instead.

43. Some teachers, especially in secondary schools, already have timetabled non-contact time. In their case, guaranteed PPA time would not be additional to this. On the other hand, where current non-contact time exceeds the 10% figure, it should certainly not be reduced to 10%, which is in any case a minimum figure for guaranteed PPA. The PPA provisions will therefore serve to protect current non-contact time, because of the stipulation that guaranteed PPA time cannot be encroached upon, even in order to cover for absent teachers.

44. Ultimately, delivery of guaranteed PPA in many schools will depend upon support staff reform. Releasing teachers from some of their previous responsibilities will require other adults to take those over, unless the tasks can be radically simplified or dropped altogether. To the extent that introducing guaranteed PPA means reduced teaching time for a teacher, the school will need innovative remodelling strategies. Guidance will be made available to schools about this. It will cover the use of teaching assistants, including the new high level teaching assistants, who will be able to work with whole classes where appropriate (see section D below on pages 11-13); and creative teaching and learning models, including, for example, teamwork options involving a QTS teacher and one or more assistants covering a double-sized group of pupils.

v. Leadership and management responsibilities

45. Members of the leadership group should have time to focus on their leadership responsibilities and be supported in leading the reform agenda and managing change in their schools. Many teachers outside the leadership group also have some form of leadership and management responsibility, including the types of distinctive responsibilities held by subject leaders and co-ordinators, advanced skills teachers, special educational needs co-ordinators and initial teacher training mentors. At present, during the initial phase of this national Agreement, it is not realistic to set out a formula for the amount of time that should support these responsibilities during the normal school day. But the Signatories are agreed that this should be signalled in the teachers' contract as an issue for schools and relevant guidance should be developed.

46. Consequently, the School Teachers' Pay and Conditions Document will be changed so that every teacher, including the headteacher and other members of the leadership team, has a timetable that provides – in addition to PPA – a reasonable allocation of time in support of their leadership and management responsibilities. This would be additional to provisions about work/life balance as above.

47. These provisions cannot hope to cover all the time needed to discharge the relevant responsibilities – for most staff, they will make only a contribution. Schools' ability to make progress with this area of change will depend critically on their use of available resources.

48. The changes will be promulgated in draft early in 2003, to take effect in every school from September 2003 at the latest, with schools working towards the changes as far as possible prior to that.

Headteacher time

49. There is a distinct problem where headteachers with significant teaching loads have inadequate time during the normal school day for their leadership and managerial role. Remodelling of the school workforce should help headteachers, as should all of the provisions in this Agreement.

50. Headteachers must have dedicated time to lead their schools, not just manage them. Therefore, in addition to the provision set out above, Governing Bodies will be expected to ensure that headteachers have dedicated headship time, having regard to relevant guidance and resources in the school. Paragraphs 56 and 58.23 of the School Teachers' Pay and Conditions Document will be also amended to include leadership among the main responsibilities of headteachers.

51. The changes will be promulgated in draft early in 2003, to take effect in every school from September 2005 at the latest, with schools working towards the changes as far as possible prior to that.

Circulars 2/98 and 22/98

52. As a consequence of the contractual and other changes arising from the Agreement, Circulars 2/98 and 22/98 will need to be reviewed. As part of the review the non-contractual provisions which will assist in tackling teacher workload and unnecessary bureaucracy not addressed elsewhere in the Agreement will be identified and strategies and timescales for implementation agreed.

School closure days

53. As flagged by the STRB and in "Time for Standards" on 22 October 2002, there will be a review of the use of school closure days.

B. Implementation Review Unit

54. A concerted attack will be made on unnecessary paperwork and bureaucratic processes for teachers and headteachers. An independent Implementation Review Unit will be established in England, to consider the impact on workload both of existing policy operation and potential new initiatives and to address issues of excessive bureaucracy. The focus will extend beyond the DfES and will cover all bodies which impact upon schools, including national agencies such as Ofsted, QCA and TTA, as well as local education authorities and learning and skills councils. The Unit will meet national partners who are Signatories to this Agreement on a quarterly basis.

55. The Unit will feature a panel of practitioners – overwhelmingly serving Headteachers. Panel job descriptions and conditions of service will be finalised following consultation with the Signatories to this Agreement and published widely. Members will be appointed on a fixed-term basis, normally for a period of 2 years. National partners and others will be able to nominate individuals for consideration as possible panel members.

56. The Unit will consider representations from all parts of the education system, including unions and employers as well as individual headteachers, teachers and other members of the school workforce. Meetings of the Panel will normally occur on a quarterly basis, with bi-annual meetings with Ministers. A report of the Unit's work, including details of both successful and unsuccessful recommendations, will be published on an annual basis. A secretariat supporting the Unit will be based in the DfES.

57. The Welsh Assembly Government is considering how best to build on work already undertaken through the Bureaucratic Burdens Advisory Group.

C. Objective of reducing overall hours for teachers

58. We are looking to schools to achieve progressive reductions in teachers' overall hours over the next four years. Government, in partnership with other Signatories to this Agreement, is committed to a national campaign that will create downward pressure leading to a reduction in these hours. But we recognise that individual schools will face varying degrees of challenge in achieving this.

59. We shall identify and highlight good practice to help support headteachers and governing bodies. Overall teacher hours will continue to be monitored by the Office for Manpower Economics on behalf of the School Teachers' Review Body on an annual basis. And we will also, at a local level, collect information from individual schools as part of the change management programme that will support remodelling.

D. Support staff reform

60. Schools will not be able to deliver in practice the contractual changes for teachers covered by this Agreement unless there are appropriate extensions in both the numbers and roles of support staff in the classroom. This will include the development of a new stream of high level teaching assistants. The remuneration of support staff, including high level teaching assistants, will need to reflect their level of training, skills and responsibilities. Negotiations are taking place in the National Joint Council (NJC) for Local Government Services to develop a national framework covering support staff employed in schools on

NJC conditions (i.e. the Green Book). The Signatories recognise that a successful outcome to these negotiations will be critical to the delivery of this Agreement.

61. Support staff working alongside teachers have *already* contributed to significant improvements in the quality of teaching and learning, including as part of the literacy and numeracy strategies, in early years and in SEN. Over the coming years, we shall see new developments, pushing back the boundaries of what assistants can do in classrooms. In taking this forward, we recognise that:

- Qualified teachers make the leading contribution to teaching and learning, reflecting their training and expertise. Each class/group for timetabled core and foundation subjects must be assigned a qualified teacher to teach them (subject to the existing unqualified teacher provisions). Accountability for the overall learning outcomes of a particular pupil must rest with that pupil's qualified classroom/subject teacher;
- Consequently, teachers and high level teaching assistants are not interchangeable and this principle will be reflected in new regulations to be introduced under section 133 of the Education Act 2002. The fact that high level teaching assistants will be working with whole classes for some of the time does not make them substitutes for when pupils need a qualified teacher, bringing the extra range, experience and complexity of understanding reflected in their higher qualifications;
- Teaching assistants who interact with pupils in relation to teaching and learning, must do so within a regulated system of supervision and leadership operated by the pupils' classroom/subject teacher; they may specialise in working across a particular subject area;
- It follows that the role of high level teaching assistants is to support qualified teachers over teaching and learning, and their duties in this regard must always be in line with their relevant training and expertise. This is especially important where high level teaching assistants are working with a class when the assigned teacher is not present;
- A professional standards framework and training for high level teaching assistants will be developed by the Teacher Training Agency and linked to relevant QTS modules. The standards of prior experience, experience on the job, and any training, should bring the high level teaching assistant to roughly the equivalent of NVQ level 4. It will provide a sound basis from which many high level teaching assistants could progress, in time, to become qualified teachers;
- Pay and career structures should be developed that reflect the roles and responsibilities of support staff, including the option for high level teaching assistants to go on and train to become a qualified teacher;
- The professional judgement of teachers about the contribution of any high level teaching assistant must be informed by an appropriate national standards framework for such assistants, and by national guidance to schools concerning the operation of the school system of supervision;
- Teachers will not usually be required to undertake formal aspects of the line-management of support staff, including personnel / career advice and performance management;
- Subject to the points above, high level teaching assistants can make a substantial

contribution to the teaching and learning process in schools and to raising standards of achievement by pupils.

Further roles

62. Support staff reform will not be confined to high level teaching assistants. Earlier paragraphs discussed the development of the cover supervisor role. Additional school support staff will also be recruited to act as "personal assistants" to teachers. They will provide administrative support to subject and year group areas, where they can provide direct, targeted support for individual teachers. They will develop expertise relevant to the teachers they support.

63. Additional technical support staff will also be recruited, including in ICT. And many schools will develop further the use of support staff in roles involving the guidance and supervision of pupils. Clearly, it will be necessary for such staff to be skilled and trained in behaviour management and to be able to command the respect of pupils.

64. Schools will also need to consider whether the management of many of the administrative and clerical tasks carried out by support staff should be transferred from qualified teachers to appropriately trained non-QTS managers.

65. There may be cases where teachers have been given management allowances for carrying out some of the tasks listed above. These allowances may continue if the teacher continues to manage the task. However, headteachers may wish to agree with those teachers alternative responsibilities that would more directly support teaching and learning.

E. Leadership team reform

66. New managers and others with experience from outside education will be recruited where they have the expertise to contribute effectively to schools' senior leadership teams.

67. We recognise that the successful management of a school may be more achievable where headteachers and governing bodies have recruited individuals with particular areas of expertise, including in business or personnel management. It has become increasingly common for schools to employ a specialist 'bursar', but often this person remains outside the senior team with limited opportunity to contribute to the wider management of the school.

68. We seek to encourage the use of all available expertise. This may include some school leaders from FE and 6th form colleges and independent schools being appointed even where they do not have QTS and a fast track mechanism by which proven leaders from other sectors can achieve QTS / NPQH and secure headship.

F. Change management programme

69. School leaders and Governing Bodies will be supported by a national "change management" programme, to help achieve in their schools the necessary reforms of the teaching profession and restructuring of the school workforce.

70. In England, this programme will be based on that developed as part of the Transforming School Workforce Pathfinder project. School leaders will want to discuss with their teachers and support staff how best to implement the provisions outlined in this Agreement and the priorities for the school in raising standards and remodelling the workforce. To assist this process, individual schools will have local access to support for the development of a 'change plan' which reflects the particular circumstances and needs of the

school.

71. Such a plan would reflect existing and new resources available to the school and would consider issues around staffing needs, use of ICT, class structures and school timetables. It will be important also for schools to become sufficiently capable and flexible to respond to future changes.

72. DfES will put in place a unit which will work closely with agencies, LEAs and the Signatories to this Agreement, but which will take responsibility for training and the overall direction and quality assurance of the programme.

G. Monitoring of delivery of this Agreement

73. This is discussed under next steps below.

No detriment

74. Where the Agreement specifies a phased timescale for contractual change and implementation of other provisions no steps should be taken in advance, as a result of the Agreement, which would result in a worsening of current working conditions.

75. However, implementation of the provisions of the Agreement at an early stage or in advance of the statutory target date will be supported by the Signatories.

4. NEXT STEPS

76. The last few months have been marked by a huge constructive effort, with give and take on all sides. We must now build on this urgently to maintain momentum for change and to start delivering real improvements for pupils and parents, teachers and support staff in schools.

77. The focus must now turn to delivery, including through the following steps to be undertaken from January 2003:

- Finalising the new contractual and legal framework:
 - DfES to offer (i) the text of draft changes to the School Teachers' Pay and Conditions Document and accompanying guidance, and (ii) new draft regulations and guidance under s133 of the Education Act 2002 – all to be finalised and agreed by the Signatories. Similar regulations and guidance will be agreed and introduced in Wales;
 - Early work to be undertaken to determine how the new provisions will apply to part-time teachers.
- Communicating the Agreement:
 - DfES and the Welsh Assembly Government to promulgate this standards and workload Agreement to all parts of the education service and take steps to ensure it is widely understood through a dedicated communications campaign;
 - NEOST to promulgate this Agreement to its members and take steps to ensure members are acting upon all parts of it; Local Government to play a leading part in facilitating change at local level;
 - All unions to promulgate this Agreement to their members, take steps to ensure members are acting upon all parts of it and withdraw related industrial action, in line with the operation of this Agreement.
- Initiating change on the ground:
 - School leadership teams and governing bodies to review and plan in discussion with staff how the phased changes covered by this Agreement can be most effectively implemented in their school;
 - DfES and the Welsh Assembly Government to put in place national change management programmes to support school leaders and governing bodies - in England to be developed on the basis of the Transforming School Workforce Pathfinder project;
 - All national agencies, LEAs and the Signatories to this Agreement to work in a concerted manner to support schools in implementing the agreed changes.
- Monitoring progress:
 - Details of the composition of the Workforce Agreement Monitoring Group - a group for Signatories to this Agreement, but involving other partners as necessary - to be finalised and agreed by the Signatories.

- Early tasks of the Workforce Agreement Monitoring Group will include:
 - To consider details of the change management programme, and the arrangements for collecting hard evidence about the pace and shape of reform at school level;
 - To establish how quickly progress can be made on reducing below 38 hours the limit on cover for individual teachers;
 - To establish regular liaison with the Implementation Review Unit, and the arrangements for making representations;
 - To review circulars 2/98 and 22/98, to agree revised text, implementation strategies and timescales;
 - To contribute to a review of the use of school closure days.

78. This Agreement will be meaningless and undeliverable without practical follow-up measures of the sort described above. Just as important as this Agreement, will be a shared understanding about each step of implementation and delivery.

Phasing of change

<p>Phase one – 2003</p> <ul style="list-style-type: none"> • Promote reductions in overall excessive hours • Establish monitoring group • Establish new Implementation Review Unit • Routine delegation of 24 non-teaching tasks • Introduce new work/life balance clauses • Introduce leadership and management time • Undertake review of use of school closure days
<p>Phase two – 2004</p> <ul style="list-style-type: none"> • Introduce new limits on covering for absent teachers
<p>Phase three – 2005</p> <ul style="list-style-type: none"> • Introduce guaranteed professional time for planning, preparation and assessment • Introduce dedicated headship time • Introduce new invigilation arrangements

5. SIGNATORIES

79. We, the undersigned, on behalf of our respective organisations, and having the necessary authority, hereby undertake that the organisations we represent are party to this Agreement:

ATL – Association of Teachers and Lecturers

DfES – Department for Education and Skills

GMB

NAHT – National Association of Headteachers

NASUWT – National Association of Schoolmasters Union of Women Teachers

NEOST – National Employers' Organisation for School Teachers

PAT – Professional Association of Teachers

SHA – Secondary Heads' Association

TGWU – Transport and General Workers' Union

UNISON

WAG – Welsh Assembly Government

APPENDIX 1

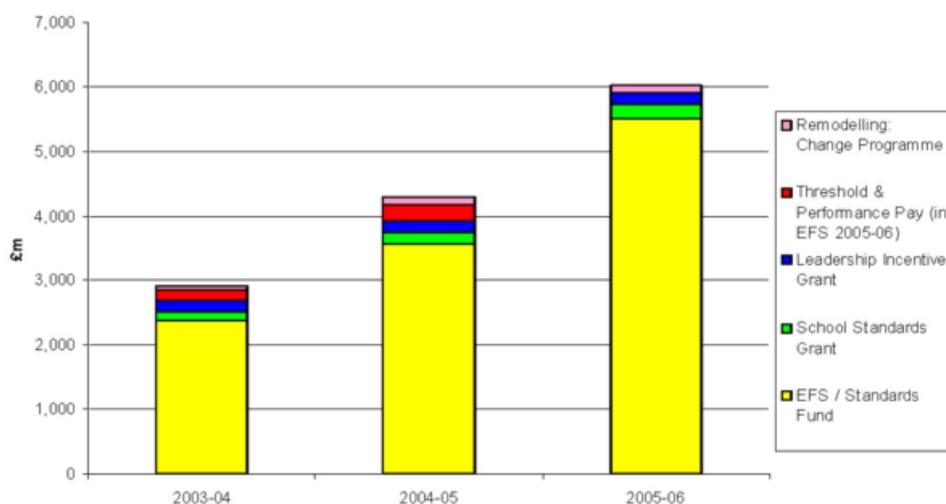
RESOURCES (England only)

The following table shows the total Funding for Schools and LEAs from 2002-03 to the end of the Spending Review period:

TOTALS (£m)	2002-03	2003-04	2004-05	2005-06
Education Formula Spending ²	22,503	25,014	26,341	28,704
School Standards Grant (recurrent)	660	800	850	875
Leadership Incentive Grant	0	175	175	175
Threshold & Performance Pay	590	740	840	0
Standards Fund	1,690	1,530	1,350	1,550
Capital (including PFI)	2,520	3,100	3,680	4,270
Devolved Formula Capital	440	685	775	800
Remodelling: Change Programme	5	62	120	110
Total	28,408	32,106	34,131	36,484

The following table and chart show the cash increases in revenue funding over the 2002-03 baseline:

TOTALS (£m)	2003-04	2004-05	2005-06
EFS / Standards Fund ³	2,351	3,494	5,467
School Standards Grant	140	190	215
Leadership Incentive Grant	175	175	175
Threshold & Performance Pay (in EFS 2005-06) ⁴	150	250	0
Remodelling: Change Programme	57	115	105
Total	2,873	4,224	5,962



² Includes SR2002 increases, transfer from DfES DEL and increase for Teachers' Pensions Contributions

³ Standards Fund included with EFS. Standards Fund is £-160/-340/-140m – this reduction has been netted of the EFS increase

⁴ Threshold and Performance Pay is £-590m in 2005-06 – this reduction has been netted off the EFS increase

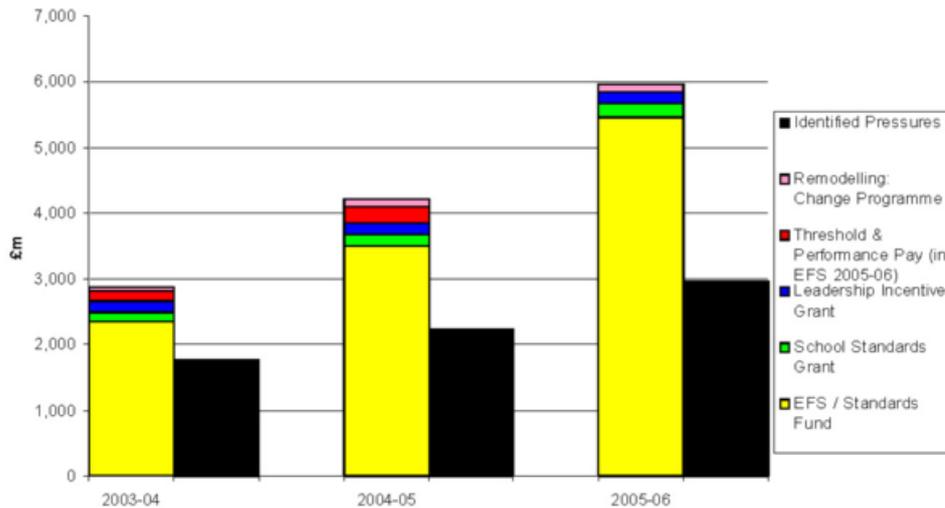
The following table shows how this revenue funding increases in real terms (excluding pensions contributions increase⁵):

TOTALS (£m)	2002-03	2003-04	2004-05	2005-06
Real Terms	25,452	27,015	27,618	28,530
Cash	25,452	27,690	29,016	30,724

Not all of the cash increase will be available to school to spend on workforce reform. There are a number of identified pressures in the following table:

TOTALS (£m)	2003-04	2004-05	2005-06
Demography	-25	-170	-325
Inflation (on pay and non-pay costs) ⁶	620	1200	1790
Employers' Pensions Contributions	635	660	690
National Insurance Contributions	115	120	125
Class Size Grant and Nursery Education Grant	420	420	420
Threshold and Performance Pay ⁷	0	0	250
Total	1,765	2,230	2,950
Total increase minus identified pressures	1,108	1,994	3,012

However, there is still a significant gap between the cash increase and the pressures. This gap grows during the Spending Review period, so that by 2005-06, there is over £3bn extra in school budgets that schools can choose how to spend, shown in the chart below.



This amounts *on average* to more than £70,000 per primary and more than £350,000 per secondary – much of which could be used for remodelling. This is in addition to the baseline already in school budgets in 2002-03.

⁵ Increased contributions of 4.75%

⁶ Inflation at 2.5% (but includes 4% for support staff pay in 2003-04)

⁷ Total cost of Threshold and Performance Pay in 2005-06 is £840m - £590m of this (equivalent to 2002-03 baseline) has already been netted off EFS (see footnote 3 above)

APPENDIX 2

DEFINITIONS AND FURTHER STIPULATIONS

“Government” in this document refers to the UK Government and the Welsh Assembly Government. ‘The Government’ refers to the UK Government only.

“Teachers” in this document always refers to any teacher covered by the School Teachers’ Pay and Conditions Document, including classroom teachers, unqualified teachers, advanced skills teachers and members of the leadership group: except where stated otherwise, or where the context clearly suggests otherwise.

The wording of the revised teachers’ contract may not follow exactly the wording in this Agreement, as it needs to fit the framework of an existing legal document. However, amendments will be agreed in all cases with the Signatories to this Agreement.

National Agreement

National Agreement signatories – 15 January 2003



From left to right:

David Hart, NAHT

Gerald Imison, ATL

Keith Sonnet, UNISON

Graham Lane, NEOST

Chris Kaufman, TGWU

Rt. Hon. Charles Clarke MP, DfES

John Dunford, SHA

Eamonn O'Kane, NASUWT

Jean Gemmill, PAT

John Edmonds, GMB

David Miliband MP, DfES

WAMG Notes

- WAMG note 1: Introduction to the National Agreement and Phase 1
- WAMG note 2: Implementation of key provisions in phase 1 of the National Agreement
- WAMG note 3: Changes to teachers' contract and development of regulations
- WAMG note 4: Schools' responsibilities for the implementation of the contractual change on PPA
- WAMG note 5: Extended roles for support staff and HLTA training Guidance for schools on Higher Level Teaching Assistant roles for school support staff
- WAMG note 6: Support staff roles and training
- WAMG note 7: Planning for the next phases of contractual change
- WAMG note 8: Characteristics of LEAs leading the way in workforce remodelling
- WAMG note 9: Progress report on the introduction of HLTA training and assessment
- WAMG note 10: Guidance on implementing the statutory requirements on cover supervision and PPA
- WAMG note 11: The Every Child Matters (ECM) agenda in England, and extended schools
- WAMG note 6 supplement: Supplementary WAMG guidance on cover supervision
- WAMG note 12: Effective deployment of higher level teaching assistants
- WAMG note 13: Implementation of the National Agreement contractual changes
- WAMG note 14: School responsibilities in the implementation of contractual change on PPA
- WAMG note 15: Sustainability of the National Agreement and priorities for 2006-08
- WAMG note 16: What schools should have in place regarding the National Agreement
- WAMG note 17: Effective deployment of higher level teaching assistants
- WAMG note 18: Supporting local social partnership and sustainable reform
- WAMG note 19: Updating local social partnerships on the programme and priorities
- WAMG note 20: Effective operation of local social partnerships
- WAMG note 21: Threshold and performance management from 2009
- WAMG note 22: The appropriate deployment of support staff in schools
- WAMG note 23: Threshold and performance management in England from September 2009 – change in timescale for assessment applications
- WAMG note 24: Threshold and performance management for teachers in England from September 2009
- WAMG note 25: Local social partnership priorities

Remodelling Cover Resource Pack

PPA Resource Pack

RIG Notes

How to address issues of equality, fairness and diversity in the implementation of performance management (2007)

How to create the right environment for performance management as an inclusive process (2007)

Note 3 Rewarding Teachers and Raising Standards – Implementing the National Agreement on Rewards and Incentives: Light Touch Validation of Performance Management (March 2005)

Note 4 Rewarding Teachers and Raising Standards – Implementing the National Agreement on Rewards and Incentives: Teaching and Learning Responsibility (TLR) payments (March 2006)

Note 5 Rewarding Teachers and Raising Standards – Implementing the National Agreement on Rewards and Incentives (March 2007)

Performance Management “How to” sheets (2007)

How to address the link between performance management, school improvement and other school processes (2007)

How to address the revised performance management arrangements for unattached teachers (2007)

How to address the effective preparation and support of reviewers (2007)

Rewards and Incentives Group – Teachers and Headteachers Performance Management Guidance (2006)

The Teachers' Guarantee



The Teachers' Guarantee



Over the past 12 years, our education system has been rebuilt on foundations of inspirational teaching, great school leadership and sustained record investment.

Our aim is educational excellence for all and narrowing the gaps in attainment so that all children and young people are able to succeed and fulfil their potential. We have made significant progress over the years, but we cannot stand still if we want every child to achieve. To achieve a world class school system we need to maintain and develop our excellent school workforce, investing in your skills and ensuring you are properly supported.

The quality of teaching is the most important factor in successful schools because the quality of the school system cannot exceed the quality of its workforce. Ofsted says there have never been as many outstanding or good schools and that's down to the hard work of teachers – and we are determined to maintain and build on that quality. That is why we will continue to invest in recruiting the most capable graduates, provide the highest quality initial teacher training and ensure that teachers have access to a wide range of high quality, professional development opportunities throughout their careers.

The school workforce today has been transformed. We now have more teachers, teaching assistants, support staff and professionals working in our schools than ever before, meaning smaller class sizes, more support for pupils on an individual basis, better discipline and more freedom for teachers to teach. All of this has led to rising standards. It is your achievements, your hard work and your commitment that should be celebrated and I want to do all I can to support you in the vital work that you do. That is why, to complement our Pupil and Parent Guarantees, which set out in law guarantees to pupils and parents of the excellent education and personal support they can expect, I am setting out our **Teachers' Guarantee** – our promise that we will continue to trust in the professionalism of teachers, support them to focus on what they do best – teach, and create the conditions that will enable the quality of teaching and learning to improve even further.

It is because of our belief and trust in your professionalism that we have reduced prescription and increased flexibility in the secondary curriculum, and will do the same with the new primary curriculum, to allow teachers to use their professional judgement and expertise to design a curriculum tailored to the needs of all children in their care. It is why we are investing responsibility for school improvement in our school leaders: schools leading their own improvement and leading the system.

Our workforce reforms, only possible because of the trust, commitment and dedication shown by our social partners, have succeeded in remodelling the school workforce in order that teachers can have the greatest impact on the learning, well-being and development of their pupils. We know the reforms so far have had a positive impact. In its report *'Workforce reform in schools: has it made a difference?'* published in January 2010, Ofsted commented that workforce reform made a considerable difference to pupils' learning and gave teachers clear professional status. It is because of these firm foundations that we are now able to set out our Teachers' Guarantee building on these reforms to ensure that all teachers have the capacity and skills to do their job supported by strong and effective leadership and a highly valued wider school and children's workforce.

In 1997, the school workforce was demoralised, de-motivated and underpaid. A lack of investment meant buildings were in decay, children were using photocopied text books and technology was scarce. We never want to return to such conditions. That is why I have committed to increase funding in real terms in the coming years to protect the front line so you can continue to provide the best outcomes for each and every child.

I am immensely grateful to all of you for what you have achieved and continue to achieve on a daily basis for our children. It is a real testament to your professionalism and commitment. That is why I think it is important that your hard work is supported by a clear affirmation of the trust that we have in you and this clear statement of the Teachers' Guarantee. Every one of you is part of the best generation of teachers ever, that is something of which you should be very proud and which I am delighted to be able to celebrate with you all.

**Ed Balls MP,
Secretary of State for
Department for Children, Schools and Families**



Our Guarantee

Guarantee No1: We will support teachers to do what they do best – provide great teaching and learning

We are all committed to delivering the best education for every child, which is why we must continue to build our world-class education system. In order to be able to give our children excellent teaching, we need to create the conditions to maintain an outstanding workforce. The National Agreement on Workforce Reform¹, signed in 2003 by Government, employers and school workforce unions, has helped support excellent teaching, as well as bringing a more professional and diverse workforce into our schools.

A professional and diverse workforce is the key to what happens within our schools – a diverse workforce inspires children, enhances their experiences and provides them with role models, which will influence the rest of their lives.

So we will deliver our guarantee by:

- **Committing to the Social Partnership.** Many of the reforms and improvements that have been introduced since the signing of the National Agreement have only been possible because of the strength of the Social Partnership and the work of the Workforce Agreement Monitoring Group and we remain committed to working with our Social Partners in a spirit of trust and openness to secure continuous improvement;
- **Committing to a national pay and conditions framework for teachers and to the School Support Staff Negotiating Body (SSSNB).** Our commitment is to a framework for pay and conditions that recognises the workforce as highly skilled professionals. The framework is underpinned by the principles of fairness and transparency that balance the need for national consistency with local flexibility. This will ensure that we can continue to recruit and retain high quality teachers and support staff, who deliver the best outcomes for our children. We will do this through a commitment to the delivery of teachers' terms and conditions through the School Teachers Pay and Conditions Document (STPCD) and through our commitment to the work of the new SSSNB. Because of the special role that Academies play in tackling entrenched disadvantage and turning around past underperformance they have particular flexibilities over the curriculum and pay and conditions. We closely monitor the impact of academy freedoms on their workforce and school standards and will continue to do so. Evidence suggests that the majority of academies adopt or indeed exceed conditions of the STPCD.

¹ *'Raising standards and tackling workload: a national agreement – Time for standards'* was signed on 15 January 2003 by ASCL, ATL, DCSF, GMB, NAHT, NASUWT, NEOST, SHA, PAT, T and G, UNISON, WAG

- **Using teachers' skills and expertise to focus on the priorities of teaching and learning.** Dedicated planning Preparation and Assessment (PPA) time has served to improve the quality of teaching and learning and research backs this up. This, alongside the fact that teachers should now not routinely undertake tasks that do not require their professional skills and judgement, for example invigilating external exams; routine clerical or administrative tasks and midday supervision provides a clear focus on the priorities of teaching and learning. Similarly, cover for the absence of colleagues is widely accepted as not being an effective use of a teacher's time because teachers are most effective when teaching their own subject(s) in a timetabled lesson. So teachers only have to provide cover rarely, and in circumstances that are unforeseeable;
- **Continuing to promote the role of Advanced Skills Teachers (ASTs) and Excellent Teachers (ETs) in supporting effective teacher practice and in helping other teachers improve their effectiveness in the classroom.** It is right that experienced and excellent teachers should remain in the classroom and be properly rewarded whilst supporting wider improvements to teaching and learning. Research on behalf of the Training and Development Agency for Schools shows that teacher-to-teacher approaches to professional development, such as those practised by ASTs and ETs, are extremely effective and it says that ASTs and ETs are particularly well placed to play a lead role in continuing professional development. ASTs have also been commended by Ofsted for their significant impact in improving teaching and learning in their own and other schools;
- **Developing and deploying the education team to support teaching and learning.** We want all members of the school workforce to be well managed, well trained and deployed effectively so that they have a clear focus on the school's priorities and objectives and support teachers in both meeting the needs of every child and removing barriers to learning. Good schools are those which deploy the full range of their staff effectively and ensure they have the right training, qualifications and support for the roles they are undertaking. In recognition of the changing school environment and unique nature of many support staff roles, we have established the new School Support Staff Negotiating Body (SSSNB) to develop a bespoke pay and conditions framework that properly takes account of the new and emerging roles that school support staff are undertaking. This new framework will bring about consistency across all maintained schools in England, whilst an inbuilt element of flexibility will ensure all maintained schools can choose individual roles for their support staff and deploy them in a way that best meets their needs;



- **Setting out our ambition that everyone in the children's workforce who supports pupils' learning should have or be working towards – a level 3 qualification.** Evidence suggests that support staff have a substantial impact on pupils' achievement and well being in the classroom. It is for this reason we outlined our ambition in the White Paper *Your Child, Your School, Our Future* to raise the professional standards of support staff and ensure that they are given the opportunity to develop their skills and progress in their careers. Working with the TDA and social partners we shall develop an action plan that will identify the types of CPD that support staff require. This will provide schools with a tool that will enable them to secure provision that will raise professional standards and assure teachers that they can rely on high quality support to enable them to focus on leading teaching and learning.

Guarantee No 2: We will support excellent teaching and learning by investing in continuing professional development for teachers and support staff

Every school should have a clear policy to support the continuous professional development of its entire workforce. Research shows that the right continuing professional development (CPD) can have a positive impact on teachers' practice, leading to improvements in pupil attainment and other outcomes. CPD can also have a positive impact on pupil attitude, enhancement of student motivation and more positive responses to specific subjects.

We have ensured through legislation that every teacher benefits from statutory induction arrangements and is engaged in high quality performance management linked to continuing professional development from when they first start teaching. However, we know that schools vary in their practice in terms of linking performance management processes and the professional standards with CPD opportunities.

So we will deliver our guarantee by:

- **Ensuring all Newly Qualified Teachers get a great start in teaching with the ongoing professional development opportunities and the support and challenge that they need to succeed.** That first year in teaching is so important and there is still much to learn, so we have ensured that during their induction period, NQTs are entitled to receive support and challenge from an induction tutor, have opportunities for development and a 10 per cent reduced timetable, in addition to Planning, Preparation and Assessment (PPA) time;
- **Providing a contractual entitlement to continual professional development for all teachers alongside a Licence to Practise.** We expect every teacher to reflect on their own performance and be committed to improving their practice, keeping their skills and knowledge up to date. As highly valued professionals, teachers will have a contractual CPD entitlement, which guarantees them time to access high quality professional development linked with performance management;
- **Making teaching a Masters-level profession with the aim, over time, that every teacher should gain a practice-based Masters in Teaching and Learning.** The first teachers have now enrolled for the Masters in Teaching and Learning, gaining the opportunity to deepen their knowledge and understanding of pedagogy and effective practice as we continue to raise the status and esteem of the teaching profession.

Guarantee No 3: We will back head teachers and teachers in using the powers they have to enforce discipline and encourage good behaviour.

Poor behaviour cannot be tolerated: it is a denial of the right of pupils to learn and teachers to teach. Behaviour standards in schools are high for the great majority of young people and the misconduct of a few represents a small percentage of the seven million pupils in the school system. But no child should have their learning disturbed by poor discipline in the classroom.

This is the first government to implement a comprehensive national programme to strengthen schools' capacity to manage behaviour. We are backing head teachers and teachers and have given them the authority to intervene to tackle bad behaviour and stop problems spiralling out of control. Sir Alan Steer said in his report published on 31 March 2010 that schools now have very much clearer, broader and better focused powers to discipline pupils than ever before. As a consequence the number of schools with inadequate behaviour is at the lowest level ever.

We will always back head teachers and teachers. We need to ensure that teachers are aware of the powers they have to tackle poor behaviour and that they have the confidence to use these powers where necessary. We also expect parents to back schools and accept they have a responsibility to support schools in enforcing discipline and good behaviour.

So we will deliver our guarantee by:

- **Giving the school workforce powers to search pupils, use appropriate physical force and apply a wide range of penalties to protect pupil safety and maintain discipline.** Schools have clear statutory powers to discipline pupils for bad behaviour that occurs in school or on the way to and from school. This includes exclusion, detention and withdrawal of privileges. We have given schools the power to search pupils for weapons and other items - without pupils consent - and to confiscate property, including mobile phones or music players. While force should only be used as a last resort, all school staff members have the legal power to use reasonable force both to prevent a crime or injury and to maintain good order and discipline amongst pupils;



- **Building on Home School Agreements, giving schools new and stronger powers to enforce parents' responsibilities to support the school in maintaining good behaviour.** In applying for a school place, every parent will agree to adhere to the school's behaviour rules. Once their child is in school, parents will be expected to sign the agreement each year and will face real consequences if they fail to live up to the responsibilities set out within it, including the possibility of a court-imposed parenting order;
- **Supporting excellent practice in behaviour management by establishing a network of up to 100 Lead Behaviour Schools and giving teachers the expert training they need.** More schools than ever have good or outstanding behaviour, so we will use this excellent practice to help support schools struggling with bad behaviour. Lead behaviour schools will be twinned with schools where behaviour needs to improve to share their innovative approaches to tackling behaviour. Our National Programme for School Leaders in Behaviour and Attendance (NPSLBA) training programme will also ensure that staff with responsibility for behaviour and attendance issues can continue to develop their professional skills;
- **Working with teachers, parents and pupils to ensure everyone is clear that bad behaviour will not be tolerated; and with parents to ensure that they accept their responsibility to support the school.** To complement our information for teachers and parents we will make sure pupils also understand the importance of good behaviour and the powers of the school to enforce discipline;
- **Ensuring that any member of staff who works with children who has an allegation of abuse made against them, has that allegation dealt with fairly, quickly and consistently.** Any allegation should be examined by someone independent of the school. The school should keep the person who is the subject of the allegation informed of the progress of the case, and consider what other support is appropriate for the individual which may include support via the local authority health or employee welfare arrangements.

Guarantee No 4: Every school will be well-led with strong, effective leadership so that high quality teaching and learning can flourish

School leadership is second only to classroom teaching as an influence on pupil learning. School leaders improve teaching and learning directly and most powerfully through their influence on staff motivation, commitment and working conditions.

School leaders play a central role in raising standards of teaching and learning. We have recognised the importance of these roles in the school environment by bringing in statutory entitlements to dedicated time to carry out these responsibilities.

Our school leaders have a responsibility to set high expectations and create the conditions for effective teaching and learning to flourish. Leaders acknowledge the high status, value and importance of teaching and learning and in creating a learning culture which enables pupils to become effective, enthusiastic and independent, life-long learners. As well as seeking to improve their own performance through professional development, school leaders should enable others to develop and improve by creating a professional learning culture within the school.

So we will deliver our guarantee by:

- **Developing our network of National Leaders of Education (NLEs).** We will ensure that school leaders are supported by a network of NLEs deployed to use their knowledge and experience of leadership and teaching to provide additional leadership capacity to schools in challenging circumstances;
- **Extending the influence of our best school leaders so that we spread excellence – with not for profit accredited providers taking responsibility for leading more than one school in order to achieve more for children and young people.** Schools will be encouraged to be involved in collaborations and more formalised arrangements led by our new not for profit accredited providers. Shared governance through federation; shared Trusts; and shared leadership with heads taking responsibility for leading more than one school will support improved pupil outcomes. These collaborations will also provide opportunities for teachers to access support, learn from the expertise of others and develop in their roles. Schools which could benefit from additional support, capacity and expertise to improve might choose to be led by an Accredited School Provider or Group (ASP/ASG). Schools which are underperforming and are joining a trust or federation as a result of LA intervention which is led by an ASP or ASG will benefit from their excellence and expertise. Maintained schools, secondary or primary, led by accredited providers will continue to be bound by statutory teachers' pay and conditions and fulfil the National Agreement.
- **Guarantee No 5: We will enhance the professional status and standing of teaching and we will support teachers in maintaining the highest professional standards whilst retaining the confidence of parents and the public.**

Teachers and head teachers are professionals and the vast majority perform to the highest standards. With a good performance management system, linked to the right, continuing professional development, as set out in our commitment within Guarantee 2, we can continue to build on these high standards. The fact that, within the context of a more rigorous inspection

framework, the proportion of maintained schools that are inspected are good or outstanding is a testament to this. The growing professionalism of the workforce is reflected in the improving quality of teaching and learning in our schools.

Every teacher also wants to know that they are working as part of a team where everyone is committed to what they are doing and where their colleagues work with them to a high standard. We cannot though, tolerate teachers and head teachers who underperform and as a consequence, let down our children and young people. Where pupils are let down, we will be tough – but we will also be fair. We will ensure that support is put in place through performance management and capability procedures



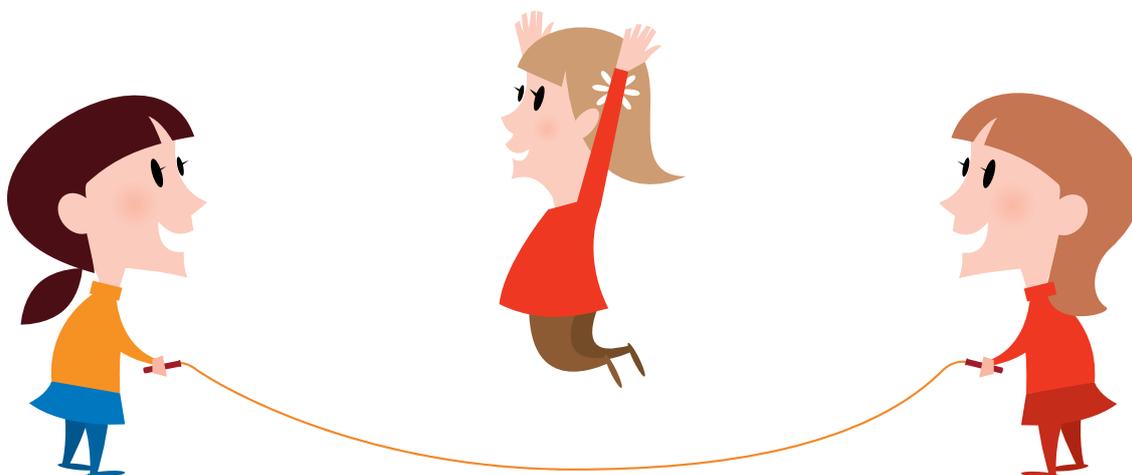
to provide help where it is needed. Where this support does not lead to improvement, it is only right that those who fall short of the expected professional standards must leave the profession.

So we will deliver our guarantee by:

- **Maintaining a performance management framework and professional standards.** This will provide teachers with a clear and consistent framework for planning what they need to do and what support and training they need to teach effectively and progress. By ensuring teachers and head teachers have a clear understanding of what is expected of them, if they are not meeting expectations then performance issues can be addressed through additional training and support, moving on to fair and transparent formal capability procedures if performance fails to improve;
- **Ensuring that those who do not uphold their professional duties and responsibilities are barred from teaching.** No teacher or head teacher wants the poor performance of a tiny minority to undermine the integrity of the profession, so it is essential that we work together to tackle issues of underperformance and incompetence. We will issue robust guidance to schools and local authorities who as employers are sometimes uncertain about their responsibilities or are reluctant to refer cases of incompetence to the General Teaching Council. We will make sure that all parties, including the GTC, play their parts in full and we are committed to working with the GTC and with key stakeholders to help ensure that we maintain trust in the profession.

Guarantee No 6: We will maintain investment in our schools, sure start children's centres and 16-19 learning to support the frontline thereby enabling the workforce to deliver entitlements for pupils.

Education has always been a top priority for this Government, and that has been backed by record levels of investment. School funding has nearly doubled in real terms between 1997-8 and 2010-11. This has enabled over 42,000 more teachers and 212,000 support staff to be recruited. As a result, outcomes for children and young people have improved dramatically. We have many more outstanding schools and many fewer underperforming schools, and our education system has gone from below average in the world to well above average. And we are committed to



continuing to increase investment in future years so that the frontline can be protected and schools can continue to improve.

So we will deliver our guarantee by:

- **Increasing spending on schools by 0.7 per cent a year in real terms in 2011-13, so that schools have the resources to deliver the best for their pupils.** Real terms increases in schools funding of 0.7 per cent, or 2.7 per cent cash at current levels of inflation, mean we can resource increasing pupil numbers – a projected further 80,000 pupils - and still increase per pupil funding by 2.1 per cent in cash, protecting our frontline priorities. This comes on top of real terms increases of 2.4 per cent, or cash increases per pupil of 4.3 per cent, in 2010-11. As in the past, we will protect schools and give them the certainty and stability that they need to plan, by setting a minimum funding guarantee (MFG): a guaranteed increase in schools' per pupil budgets in cash terms;
- **Supporting all schools to make efficiencies, in order to protect the frontline and reinvest in improving outcomes for pupils.** There is no doubt that this is a tougher financial settlement than in the past and tough choices have to be made by schools, by local authorities and by Government. School leaders and staff are responding vigorously to the challenge of identifying efficiency savings in order to switch resources to the frontline. We will support schools with free financial consultancy advice, conferences and workshops and we are supporting clusters of primary schools with 1000 more school business managers. At the same time, DCSF will find £500 million in savings from central budgets because protecting the frontline is our priority;
- **Introducing a Local Pupil Premium to ensure that funding for pupils from deprived backgrounds is better targeted on those who need it most.** To ensure that all schools with pupils from disadvantaged backgrounds get the additional resources they need, we will require local authorities to work with their schools, who understand the needs of their pupils and schools best, to use a Local Pupil Premium to distribute deprivation funding. Based on their own local decisions of how best to measure deprivation, the Local Pupil Premium will increase the transparency and responsiveness of funding for deprivation - to ensure it reaches the pupils who need it;
- **Taking forward our Building Schools for the Future pledge to rebuild or refurbish all secondary schools.** Teaching and learning is being transformed by our commitment to improving the quality of school buildings and providing state-of-the-art equipment and technology. Capital investment has increased steadily to record levels: £1.4 billion in 1999-2000, rising to £8.235 billion in 2010-11. Since 1997, 4000 schools have been rebuilt or substantially refurbished. 148 schools have benefited from investment under the BSF programme and over 100 local authorities are in BSF, with a 1000 schools in the pipeline, creating a 21st century environment that supports inspirational teaching and learning.

- **Building on Home School Agreements, giving schools new and stronger powers to enforce parents' responsibilities to support the school in maintaining good behaviour.** In applying for a school place, every parent will agree to adhere to the school's behaviour rules. Once their child is in school, parents will be expected to sign the agreement each year and will face real consequences if they fail to live up to the responsibilities set out within it, including the possibility of a court-imposed parenting order;
- **Supporting excellent practice in behaviour management by establishing a network of up to 100 Lead Behaviour Schools and giving teachers the expert training they need.** More schools than ever have good or outstanding behaviour, so we will use this excellent practice to help support schools struggling with bad behaviour. Lead behaviour schools will be twinned with schools where behaviour needs to improve to share their innovative approaches to tackling behaviour. Our National Programme for School Leaders in Behaviour and Attendance (NPSLBA) training programme will also ensure that staff with responsibility for behaviour and attendance issues can continue to develop their professional skills;
- **Working with teachers, parents and pupils to ensure everyone is clear that bad behaviour will not be tolerated; and with parents to ensure that they accept their responsibility to support the school.** To complement our information for teachers and parents we will make sure pupils also understand the importance of good behaviour and the powers of the school to enforce discipline;
- **Ensuring that any member of staff who works with children who has an allegation of abuse made against them, has that allegation dealt with fairly, quickly and consistently.** Any allegation should be examined by someone independent of the school. The school should keep the person who is the subject of the allegation informed of the progress of the case, and consider what other support is appropriate for the individual which may include support via the local authority health or employee welfare arrangements.

Guarantee No 4: Every school will be well-led with strong, effective leadership so that high quality teaching and learning can flourish

School leadership is second only to classroom teaching as an influence on pupil learning. School leaders improve teaching and learning directly and most powerfully through their influence on staff motivation, commitment and working conditions.

School leaders play a central role in raising standards of teaching and learning. We have recognised the importance of these roles in the school environment by bringing in statutory entitlements to dedicated time to carry out these responsibilities.

Our school leaders have a responsibility to set high expectations and create the conditions for effective teaching and learning to flourish. Leaders acknowledge the high status, value and importance of teaching and learning and in creating a learning culture which enables pupils to become effective, enthusiastic and independent, life-long learners. As well as seeking to improve their own performance through professional development, school leaders should enable others to develop and improve by creating a professional learning culture within the school.

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