

*Raising standards  
and tackling workload:  
a national agreement*

TIME FOR STANDARDS

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

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## **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 21<sup>st</sup> 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 tasks<sup>1</sup>. 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;

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<sup>1</sup> 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:

- Teachers should not routinely be required to invigilate external examinations;
- Teachers should usually continue to conduct practical and oral examinations;
- 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:

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

## **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

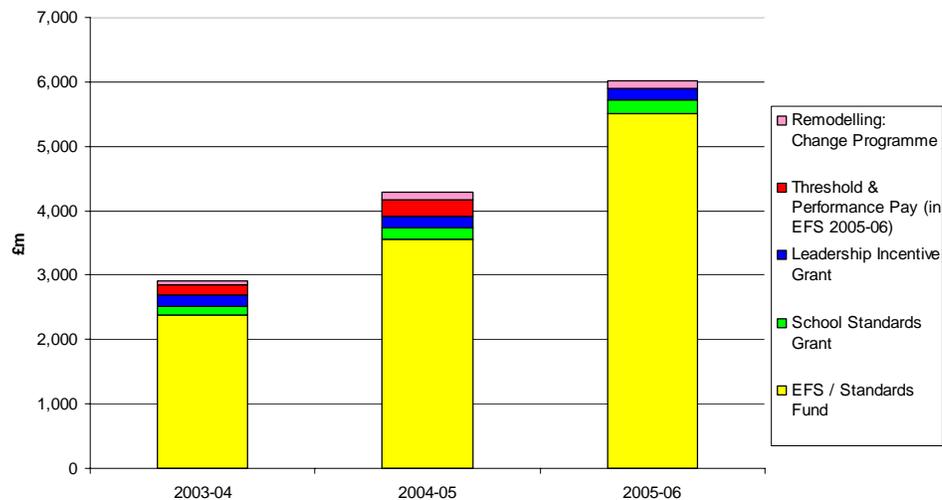
### RESOURCES (England only)

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

<b>TOTALS (£m)</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>
Education Formula Spending <sup>2</sup>	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
<b>Total</b>	<b>28,408</b>	<b>32,106</b>	<b>34,131</b>	<b>36,484</b>

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

<b>TOTALS (£m)</b>	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>
EFS / Standards Fund <sup>3</sup>	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) <sup>4</sup>	150	250	0
Remodelling: Change Programme	57	115	105
<b>Total</b>	<b>2,873</b>	<b>4,224</b>	<b>5,962</b>



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

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

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

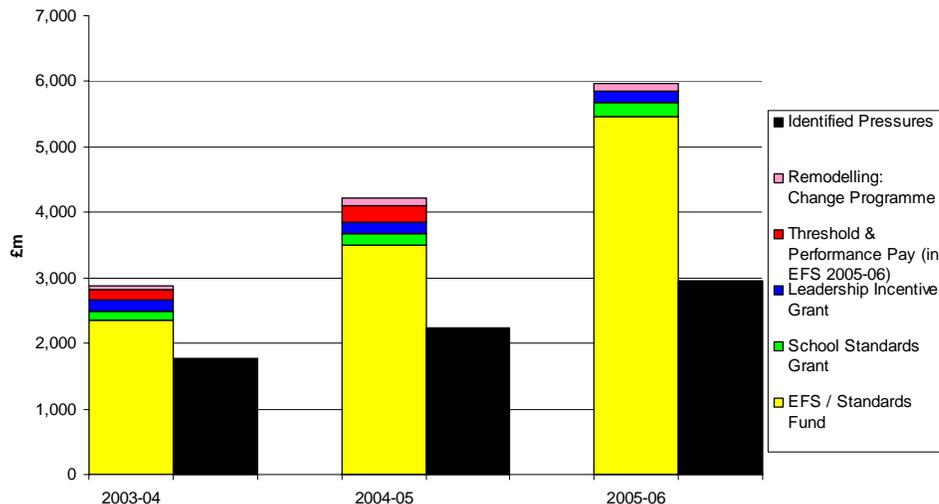
The following table shows how this revenue funding increases in real terms (excluding pensions contributions increase<sup>5</sup>):

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) <sup>6</sup>	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 <sup>7</sup>	0	0	250
<b>Total</b>	<b>1,765</b>	<b>2,230</b>	<b>2,950</b>
<b>Total increase minus identified pressures</b>	<b>1,108</b>	<b>1,994</b>	<b>3,012</b>

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.

<sup>5</sup> Increased contributions of 4.75%

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

<sup>7</sup> 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.