

# Administrative Support Staff in Schools: Ways Forward

Katy Greene, Barbara Lee,  
Ellen Springall and Rachael Bemrose

National Foundation for Educational Research

**Research Report  
No 331**

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Ellen Springall and Rachael Bemrose**

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# 1 Introduction to the research

## 1.1 The context for the research

The use of administrative support staff in schools has increased significantly in recent years and there has been much discussion of their role and the tasks they could or should be carrying out. At the time when the current research was commissioned the Department for Education and Skills (formerly DfEE) had introduced a number of strategies designed to ease the bureaucratic burden of teachers, thereby releasing time for them to devote themselves to their key task of teaching. The Better Regulation Task Force made a number of recommendations on reducing 'Red Tape Affecting Head Teachers' (Cabinet Office, 2000), and in small schools, extra funds were made available through the Small Schools Fund (formerly the Administrative Support Fund for Small Schools (ASFSS)). For all schools, advice and recommendations on reducing the administrative tasks carried out by teachers and headteachers have been forthcoming from several sources.

The role of administrative support staff has usually been discussed in the context of reducing teachers' workload and in 2001 the Government commissioned PricewaterhouseCoopers to conduct an independent study into this very issue. Amongst the findings and recommendations in the resulting report are references to the contributions which are or could be made by administrative staff.

Another change which has come about is the Government pledge to increase the number of trained bursars (or equivalent administrative staff) and to ensure that they have opportunities for training and development. The National College for School Leadership is currently developing a pilot training scheme for bursars.

The teachers' unions and UNISON have also been very involved in investigating questions of teacher workload and the most appropriate use of non-teaching staff, with a particular emphasis on the role of classroom assistants.

Research into the use of administrative support staff in schools has been limited but has included investigations into the following areas:



- the innovative uses of non-teaching staff in primary and secondary schools (Mortimore *et al.*,1992)
- reducing the bureaucratic burden on teachers (Coopers and Lybrand, 1998)
- the use of associate staff in schools, including the use of clerical or office staff (NUT, 1998)
- the role of the bursar (O’Sullivan *et al.*,2000)
- working with support staff: their roles and effective management in schools (Kerry, 2001).

It is within this context that the DfES commissioned the National Foundation for Educational Research to carry out research into the role of administrative support staff and the impact of their work on teachers and pupils.

## **1.2 Aims and objectives of the research**

The aims of the research were to establish:

- the impact of administrative support in schools
- how teachers employ any time released by the presence of extra administrative support
- how the effective use of administrative support, including teacher time released, can best be used to support pupil attainment.

The specific objectives which the research was designed to meet were as follows:

- to establish the full range of roles that additional administrative support staff play in schools
- to establish how administrative staff support teachers in their work
- to identify how teachers utilise the time released by the presence of extra administrative support staff
- to establish how this extra time is best used to support pupil attainment
- to identify the extent of the impact on pupil performance that extra administrative support can have
- to identify effective practice in the use of administrative support staff in schools, including the use of ICT.

## **1.3 Methodology**

In order to meet the aims and objects outlined, the team carried out a number of research activities:

- a review of research literature
- case studies
- school and teacher surveys
- an analysis of performance data.

It was envisaged that each element would contribute a particular set of data to the research findings: the literature review would ensure that the proposed investigation built upon any existing research into the issues; the case studies would explore in detail the different approaches adopted by schools and the effects on schools, teachers, support staff and pupils; the questionnaire surveys would provide a national overview of approaches taken by schools; the analysis of performance data would help to explain the evidence arising from the surveys.

## **1.4 The research activities and the participants**

Details of each of the research activities are provided below with information on the numbers of people involved in each one.

### **1.4.1 Review of literature**

In order to have a context for the research the team carried out a review of relevant literature relating to policies, practices and research. A summary report on the initial findings was presented to DfES in November 2000. As further policy decisions have been made, other actions taken and further research undertaken, so the team has continued to add to the review. The references to such literature have been included throughout this report, related to the findings from the current research, rather than in a separate section.

### **1.4.2 Exploratory case studies**

During the autumn term 2000, case studies were conducted in eight schools: three secondary, three primary and two special (for details see Appendix 1). In each

school, face-to-face interviews were carried out with a range of staff in order to elicit different perspectives. This included:

- the headteacher or another senior member of staff
- heads of department in secondary schools and subject or key stage coordinators in primary and special schools (or other appropriate teacher)
- subject or classroom teachers
- administrative staff.

These case studies were designed to explore staff experiences and perceptions in relation to a wide range of issues concerning administrative tasks. All interviewees, headteachers, heads of department, teachers and administrative support staff, were asked broadly the same questions although the focus reflected their particular role in school. They were asked:

- what they considered to be administrative tasks
- if there had been any changes in their workload in the last year
- whether administrative support time had been monitored
- for examples of approaches adopted where administrators were supporting teachers
- about the role of ICT in their work
- about the impact of administrative support on teachers and pupil performance
- if they had any related training requirements.

Interviewees were also given the opportunity to add further information that they felt was relevant.

The data from the case studies were analysed and an interim report on the findings was presented to DfES in May 2001. A summary of the main themes discussed in that report is provided in Appendix 1.

### **1.4.3 Questionnaire surveys**

The questionnaire survey was originally due to be administered in the spring term of 2001 but was delayed until June, as all fieldwork was postponed until after the General Election. Questionnaires were sent out immediately after that to 600

secondary schools, 600 primary schools and 200 special schools. The sample of schools took account of the size of the schools as it was important to ensure that sufficient small schools (that is, those eligible to received the Small Schools Fund) were included. Details of the sample can be found in Appendix 1.

Each school was sent questionnaires for:

- the headteacher
- the bursar/school administrator
- a head of department/subject coordinator
- one or two class/subject teachers (primary schools) and two or three subject teachers (secondary schools)

Table 1.2 shows the numbers of questionnaires completed and returned and the percentage of respondents that represents.

<b>Instrument Type</b>	<b>Headteacher Questionnaire</b>		<b>Bursar/Administrator Questionnaire</b>		<b>Coordinator/Head of Department Questionnaire</b>		<b>Teacher 1 Questionnaire</b>		<b>Teacher 2 Questionnaire</b>		<b>Teacher 3 Questionnaire</b>	
	<b>Allocated</b>	<b>Returned completed</b>	<b>Allocated</b>	<b>Returned completed</b>	<b>Allocated</b>	<b>Returned completed</b>	<b>Allocated</b>	<b>Returned completed</b>	<b>Allocated</b>	<b>Returned completed</b>	<b>Allocated</b>	<b>Returned completed</b>
<b>Primary</b>	600	<b>205</b> 34%	600	<b>182</b> 30%	600	<b>126</b> 21%	600	<b>155</b> 26%	562	<b>60</b> 11%	0	<b>0</b>
<b>Secondary</b>	600	<b>142</b> 24%	600	<b>150</b> 25%	600	<b>120</b> 20%	600	<b>167</b> 28%	600	<b>111</b> 19%	471	<b>45</b> 10%
<b>Special</b>	200	<b>78</b> 39%	200	<b>80</b> 40%	200	<b>44</b> 22%	200	<b>58</b> 29%	193	<b>24</b> 12%	0	<b>0</b>

As the table shows, rates varied between ten per cent and 40 per cent. Overall, the response rate of at least one questionnaire returned from each school was close to 50 per cent, a perfectly acceptable response rate. However, the level of response may have been affected by the timing of the survey, since many teachers are occupied with key stage assessments, GCSE examinations and parental reporting procedures during the summer term. The project team received a number of phone calls and letters providing reasons why school staff were unable to participate. These reasons included staffing and workload issues, the introduction of new initiatives taking up teacher time and summer term tasks as mentioned above.

The questionnaires all covered similar topics, although not all participants were asked about all topics. The questions were tailored towards the post held by the respondent and the phase in which they worked. Topics covered across all questionnaires comprised the following:

- the school approach to administrative tasks
- numbers and roles of administrative staff
- administrative tasks carried out
- delegation of administrative tasks
- changes in levels of administration and types of tasks
- use of ICT for administrative tasks and training for such use
- training for administrative staff
- administrative tasks and teaching staff
- funding for administrative tasks to be carried out
- personal and school information.

#### **1.4.4 Case studies of good practice**

The final case studies were designed to focus on the areas of good practice which had emerged from the questionnaire survey. Six schools agreed to participate: two secondary, three primary and one special school. These schools were selected from those identified as having good or improving pupil performance at relevant key stages (or GCSE), and where the questionnaire responses had indicated that the school used approaches which would be of interest to others. Points which might be of interest were identified by the team and the Steering Group as: particular approaches to using

the Small Schools Fund; use of ICT; shared administrative staff; multi-skilled support staff; good communication processes between teachers and administrative staff. The size of school was also a factor as it was hoped that one or more of the schools would be receiving the Small Schools Fund.

In each school, interviews were held with the headteacher, a head of department or subject coordinator, one or more teachers and one or more members of the administrative support staff. The issues explored with schools in these case studies were of two kinds:

- those which covered all the aspects of the school's organisation of administrative tasks, following on from the information provided in the questionnaire
- those which focused on particular points of interest in that school, which had been raised in the questionnaires.

The findings from these case studies and illustrative material have formed the basis for most of the qualitative findings presented in the report. However, where appropriate, examples of effective practice found in the exploratory case studies have also been used.

#### **1.4.5 Analysis of pupil performance data**

An additional task carried out by the team (the project statistician, in particular) was to make comparisons between the levels of pupil performance in small schools (that is, those receiving the Small Schools Fund) and those in larger schools. Regression analysis was also carried out to investigate whether responses to the questionnaire questions were affected by the size of school (and therefore funding) and the overall levels of performance. The results of these analyses are referred to in Chapter 9.

### **1.5 This report**

The report draws together the findings from all the research activities and presents them according to the themes which have emerged from the data. References to the literature are made where appropriate in the text, and the results of both the questionnaire survey and the case studies contribute to each of the chapters. At the

end of each chapter there is a list of summary points and the final chapter provides an overall summary, discussion of the findings and recommendations for future practice.





## 2 The school approach to administrative tasks

### 2.1 Background

The research by Coopers and Lybrand (1998) recognised the importance of good school organisation in helping to reduce the administrative workload of teachers. They argued that schools need to ensure that they actively seek to reduce any unnecessary administrative tasks which teachers are presently required to carry out and manage those administrative duties which are unavoidable. They concluded that *'most teachers ... receive little or no administrative or clerical support to underpin their job. They do all their clerical work themselves'*. One of the report's recommendations states that schools should consider the use of administrative assistance to reduce the remaining bureaucratic burden on teachers.

The use of administrative support staff to reduce the workload of teachers was also discussed in the research carried out by the NUT in 1998. This research found that the extent to which clerical staff were able to offer administrative support to teaching staff varied widely across schools, and in particular across phases, with primary teaching staff less likely to have access to administrative assistance than their secondary colleagues. The report went on to state that primary teachers were in no less need of, or entitled to, administrative assistance (NUT, 1998).

The research also found that those schools with a coherent administrative support system had certain common features:

- the school had a policy for such support
- staff within the office were earmarked for this particular function or were organised as a separate section of the office
- departments received allocated and timetabled time for departmental administration
- teachers knew the arrangements and could allocate tasks without having to negotiate with, or ask a favour of, busy staff.

Kerry (2001) stated in his research of effective management of administrative support staff that the role of such staff needs to be better developed and managed by those with leadership responsibilities (that is, headteachers, the senior management team (SMT) and teachers).

In support of other research in this area, the study by PricewaterhouseCoopers (2001a) found that those schools highlighted as demonstrating best practice had developed a strategic approach to administrative support. Their findings were based on fieldwork in over 100 schools and discussions with a variety of national and local bodies. The PricewaterhouseCoopers study concluded that many administrative tasks which teachers and headteachers currently complete could be successfully undertaken by administrative support staff. Moreover, it is how administrative support is organised in schools which is crucial in determining whether administrative support can be directly accessible to teachers.

Additionally, the PricewaterhouseCoopers study argued that there is a range of time-intensive tasks currently being undertaken by teachers and senior managers which could be successfully undertaken by administrative support staff. The research found that effective support occurred in secondary schools where administrative support staff were allocated and managed by the subject area or faculty. The PricewaterhouseCoopers study also found that teachers would benefit if administrative support were available before and after school. Additionally, in primary and special schools, teachers would benefit if administrative support were to be made available at specific points in the school week.

## **2.2 Survey findings**

Whilst previous research supports the need for a more formalised, structured approach to administrative support in schools, findings (from both the survey and case studies) show that many schools are operating on an informal, ad hoc system. For example, in the NFER survey, school administrators were asked if their school had any written guidelines on the administrative tasks to be carried out. Tables 2.1 to 2.3 show that in all phases the majority of school administrators reported that they did not have such guidelines.

**Table 2.1 Written guidelines on the administrative tasks carried out (Secondary School Administrators)**

	%
Yes	22
No	76
Missing	3

(N=151)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

**Table 2.2 Written guidelines on the administrative tasks carried out (Primary School Administrators)**

	%
Yes	20
No	75
Missing	4

(N=183)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

**Table 2.3 Written guidelines on the administrative tasks Carried out (Special School Administrators)**

	%
Yes	21
No	79

(N=80)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Administrative support staff were asked to return a copy of their current job description with the questionnaire. The job descriptions showed that administrative support staff undertook a wide range of roles and responsibilities. Secondary school administrators undertook a wider range of roles and responsibilities than their primary and special school counterparts (see Appendix 2).

### **2.3 Case study findings**

Across the six case studies, the research found differences between phases, size of school and the view of the headteacher on the approach to administrative support. The sections below provide illustrations of the approaches used in each school.

### *Secondary*

Two secondary schools were visited in the second phase of this research project. Secondary schools tended to employ a greater number of administrative support staff who had roles relating to specific school tasks. An example can be found in Case Study B:

#### *Case study B*

In this school there are eight roles which have a purely administrative function and a further five roles that have an element of administrative support. The headteacher felt that the staff handbook contained information on how and when teachers could access administrative support, but did feel that systems for processing administrative requests were largely informal and were responsive to changes that took place. For example, one member of the administrative support team responsible for curriculum support was expected to support teachers, but a different part of her job had grown and made demands on her time. Despite this, teachers were able to access administrative support in a number of ways. For example, reprographics staff undertook photocopying for members of the teaching staff, the examinations officer was able to take the pressure of running exams from the teaching staff, and the librarian did a lot of work to help teaching staff. The headteacher and SMT had the support of the school secretary who was also described as fulfilling the role of the headteacher's personal assistant. Additionally, following a complete review of schemes of work carried out in the last 12 months, administrative support staff did all the word processing and photocopying associated with schemes of work, whilst teachers continued to provide the content.

The headteacher had recently reorganised the teams in the school and some teams now had a mixture of teaching and administrative staff. He felt that this helped all staff to fulfil the needs of the school more effectively.

In another school, administrative support was allocated to specific departments or faculties, as recommended by the PricewaterhouseCoopers findings.

#### *Case study A*

This school is a split site school, with a growing 6<sup>th</sup> form. The school had just appointed a part time administrator and librarian post in the 6<sup>th</sup> form. There were two people in these posts, providing a total of 25 hours per week administration and 25 hours librarian time a week. Across the whole school there had been some changes to administrative support hours, but nothing significant.

One teacher at this school noted that how and when teachers could access support for photocopying was clearly outlined in the reprographics system handbook. However, teachers required other tasks to be completed immediately.

#### *Primary*

In the three primary schools visited in the second phase of the research project there were some differences in how administrative support was organised in the school. However, in all of them there had been some degree of reorganisation. Across the three schools it appeared that the headteachers had benefited most from this reorganisation. For example, case study C shows how the headteacher had reallocated some administrative tasks to administrative support staff.

#### *Case study C*

The current headteacher had been appointed in January 2001 and had introduced a reorganisation of administrative support in April 2001 by creating two new posts: a full time Office Manager and a part time School Secretary. Before the appointment of the new headship and the two new administrative posts, the old headteacher had undertaken all of the administration himself.

#### *Case study D*

This primary school is a small village school with 56 children. The school received the Small Schools Fund. The School Secretary had worked at the school for 15 years. When she was first appointed she worked two and half-hours on a Monday and Friday morning. She was currently employed to work 15 hours a week during term time. In addition to being employed as the School Secretary, she also took on the role of a

classroom assistant two mornings a week. The School Secretary reported undertaking general school administrative tasks and tasks for the headteacher. For example, the headteacher wrote the school reports, policies, headteacher's report to the governors and the school secretary word processed them and up-dated them accordingly. Teachers completed their own records, reports, work sheets, assessments and so on.

In both of the above schools administrative support staff had allocated time slots in which they completed specific administrative tasks, however these tended to be general school administrative tasks and tasks associated with the headteacher's role rather than timetabled support for teaching staff.

#### *Case study E*

This school is small primary school in a city in the North West of England. In October 2000, the part time administration officer retired, and for five months the school was without administrative support. During this time the headteacher took on the responsibility for administrative tasks. At the same time the school was inspected, and it was reported that the headteacher was doing too much work. As a result a full time administration officer was appointed in April 2001. The headteacher felt that she would increasingly be able to delegate administrative tasks to the administration officer as she became more familiar with the role. The administrative officer undertook finance-related general school administrative tasks and tasks for the headteacher.

#### *Special*

One special school was visited during the second phase of this research project. Interestingly, this school had provided administrative support for tasks associated with Beacon status.

#### *Case study F*

This school has Beacon status and both the headteacher and teachers reported that this might have indirectly contributed to an increase in administrative tasks. Staff at the school were conscientious, did everything in detail and wanted to do things well.

This special school employed four members of staff who had an administrative support role. These included a personal assistant to the headteacher, a general clerical assistant, a part time administrative assistant and a part time librarian.

The general clerical assistant provided administrative support to the teaching staff. For example, teachers could access administrative support for general word processing and schemes of work. This provision was on an informal basis, i.e. there were no set times during the school week where teachers could access this support, or any written guidelines which the teachers could follow. However, one of the senior management team, who acted as the beacon coordinator, did receive secretarial support for administrative tasks associated with this role.

Evidence from the six case studies showed that many headteachers undertook routine administrative tasks and that administrative systems were often reorganised in a way that mainly supported the headteacher and SMT. In general, none of the schools visited reported having a formal system or set of guidelines for administrative support which teaching staff could follow. Nor did any of the schools plan to introduce one.

Some teaching staff reported that they were unaware that they could access the administrative support staff for their own administrative duties and some teaching staff felt reluctant to access this support. They reported that they thought the administrative staff were employed to provide administrative support to the headteacher and SMT. For example, on the one hand, a teacher in Case Study E reported *'The Admin Officer is helpful, but she is mainly employed to support the headteacher'*. On the other hand, most headteachers expressed a desire for the teaching staff to use the administrative support staff more frequently. This raises an issue about the levels of communications on the usage of administrative support between the headteacher and teaching staff.

Factors that may inhibit some teaching staff from accessing administrative support include the size of the school and the number of support staff employed. For example, in Case study D, a small rural primary school, both teaching staff and the school secretary described the school as working 'like a family'. In situations like this the general rule seems to be that whoever has the time to complete a task does so. It



is the goodwill of the teaching and administrative staff which enables tasks to get completed.

Moreover, teachers may be reluctant to access administrative support because they feel that it forms part of their teaching role. For example, one teacher in case study F, a special school, reported that her heaviest administrative workload was a spin off from teaching, in that most administrative paperwork was associated with pupil-centred data-gathering tasks. She felt that administrative support staff were not well placed to help with this type of task. This view was further supported by a teacher in case study C, who had only been teaching for four years. She said: *'Admin is part of my job and I don't really question it. I think most teachers think this way'*.

Another issue that arose throughout the case studies was a culture of reluctance to use administrative support. Many teachers' explained that they felt uncomfortable or embarrassed about accessing such support through the school office. For example, teacher in case study A, stated *'I wouldn't like to delegate admin tasks to office staff...I would be adding extra pressure on them'*. One teacher in case study E stated that *'In order to get teachers to accept that it is OK to delegate there needs to be transitional period'*. This suggests that schools and teachers need to adopt new strategies if they are to encourage a culture change in the way teachers manage administrative paperwork. For example, the same teacher added *'There is not enough time to explain thoroughly what you want, therefore it is easier to do it yourself. However, if it were possible to delegate photocopying it would require you to be more organised and efficient at deciding what to photocopy rather than doing it on an ad hoc basis'*. If teachers were clear about what and when they delegated aspects of tasks to administrative support staff and this was seen to be acceptable practice then more teachers would feel comfortable about delegating appropriate tasks to others.

## **2.4 Key issues/findings**

Findings from the survey and case studies showed that:

- Many schools operated an informal, ad hoc administrative system. However, the size of the school also affected this as there was a greater need for administrative

systems to be in place in larger schools. Smaller schools tended to rely more on teamwork and informal procedures.

- Job descriptions for administrative support staff existed in many schools.
- Most schools did not have written guidelines on how and when teachers could access administrative support. Secondary schools were more likely than primary or special schools to have staff handbooks providing some guidance on administrative arrangements.
- Secondary schools employed proportionately more administrative support staff than primary and special schools.

In particular, findings from the case studies showed that:

- In some secondary schools administrative support was allocated to specific departments or faculties.
- There was a greater need for formal administrative systems in larger schools.
- There had been some degree of reorganisation of administrative support in primary schools, often enabling more support to be provided for the headteacher.
- Primary schools had allocated time slots for general school administrative tasks and/or tasks for the headteacher.
- Administrative support staff mainly undertook tasks on behalf of headteacher and SMT.
- Many teachers were either unaware of the availability of, or reluctant to access administrative support.
- Small schools operated on the goodwill of staff.



## **3 The numbers and roles of administrative staff**

### **3.1 Background**

State schools are increasingly complex organisations with a diverse range of demands being placed on them. In answer to this, some schools have recruited new administrative staff to particular roles, either as part of a long-term plan, or as a temporary measure to fulfil a specific need.

Estelle Morris, the Education and Skills Secretary, stated in her speech to teachers at the Social Market Foundation (Morris, 2001), that the number of support staff had grown rapidly over recent years and now included a range of roles. She also argued that headteachers need to deploy strategies which can liberate teachers from tasks they do not need to be doing which will help them concentrate on improving pupil achievement.

One example of how this can be achieved was illustrated by a case study in the *'Bureaucracy Cutting Toolkit'* research, where a school had employed a copy typist for 60 hours as a one-off exercise to enter all the pupils' options, class and set lists into an appropriate database (DfEE, 1999b). Another school in the same study had recruited an administrative assistant to each of the seven faculties. The assistants each worked 14 hours a week, and had core duties of reprographics, ordering materials, basic administration and data collection and returns (DfEE, 1999b).

#### **New roles**

It is clear from previous research that some schools are actively changing the role and function of administrative support staff to fit in with the changing demands of headteachers and SMT. Two key roles that have emerged in state schools include the role of the bursar and personal assistant.

#### **Bursarship**

A key administrative and management role for some schools is that of bursar. Survey research published in 1994 found that since the introduction of Local Management of

Schools, 15 per cent of primary and 46 per cent of secondary schools had added a bursar to the staff, as a member of the schools' senior management team (Maychell, 1994). A recent analysis of the job descriptions of 34 school bursars found that the role comprised administrative, management and leadership elements (O'Sullivan *et al.*, 2000). The specific administrative tasks found by the research to be part of the role of bursars included:

- providing documentation and assistance to the schools' auditors
- assisting with administrative arrangements in connection with the appointment of teaching staff
- keeping and maintaining all school accounts and preparing income and expenditure accounts and balance sheets.

As more schools have developed a strategic approach to school management, the nature of the bursar's role has changed and developed. O'Sullivan *et al.*, (2000) argue that the state school bursar role ranges from that of administrator/finance officer through to school business manager. They identify four models that outline the structure of the bursarship and its relationship with other managers and leaders in the school.

- *Administration manager*: the bursar is not a member of SMT, but rather they are seen as servicing the needs of teachers and management staff on request. Although they may be seen as being able to provide information relevant to the educational decision making process, they are seen as not having any relevant expertise in understanding the learning processes, as they are not teachers.
- *Support services manager*: the bursar is an advisor to SMT, but still seen as subordinate to teaching staff. The bursar is usually the leader of the support staff. There are power struggles over the status of bursars as formal participants in the strategic planning team.
- *School business manager*: the bursar is a fully functional and accepted member of SMT. They are a formal member of the strategic planning team, attending all meetings and contributing to the decision making process. The bursar is leader of

support staff with some human resource management responsibilities for teaching staff. A key part of the role is managing outsourced contracts.

- *Education resource manager*: this is an emerging position. The bursarship is integral to SMT, the position is equivalent, or higher than, that of deputy head. The bursar is responsible for all human resource management as well as all functions that affect the provision of a high quality learning environment.

O'Sullivan *et al.*, (2000) argue that the bursar can evolve into a school leader, with a valuable role to play in the school management team. Moreover, they see that underpinning the role of the bursarship is a contribution to the success of teaching and learning in the school. It is also clear that the increasing professionalisation of bursarship will mean that the bursar's potential contribution as a member of senior management has significant implications for the future role of the headteacher.

More recent research by PricewaterhouseCoopers (2001) supported this view by stating that headteachers could significantly benefit from appointing a bursar. The PwC study argued that bursars could make a positive impact on the business management of the school and the way teacher workload is managed. The PricewaterhouseCoopers study found that in those secondary schools where a bursar had been appointed they undertook a wide variety of tasks associated with the management of finances, school premises, human resources, information technology, data management, facilities management, and the administrative infrastructure. In larger secondary schools the bursar may be member of the Senior Management Team (SMT). In some secondary schools this role may have grown originally from a secretarial role, and any existing staff would therefore benefit from further training. The study found that a good bursar could have a positive impact on the way teacher workload is managed in a school. In primary and special schools this role could be achieved by extending the role of school secretary or administration officer, or by the creation of an additional full or part time post. In smaller primary schools there are existing successful models for sharing bursars between schools and/or buying in the service from specialist providers.

More recently *The White Paper, Schools: Achieving Success*, December 2001 announced more support for teachers in and out of the classroom. This includes 1,000 more trained bursars over the next three years (England. Parliament. HoC, 2001).

### **Personal assistants**

Recent research on teacher workloads by PricewaterhouseCoopers (2001a) found that headteachers' workload can be reduced significantly by the employment of a personal assistant to undertake high level administrative duties. The study found that whilst many secondary schools already had such posts, most primary headteachers have limited access to this kind of support. There would therefore be significant gains for them in terms of managing their workload if they were able to employ personal assistants with these specialist skills. The study also found that those headteachers who had already employed a personal assistant indicated that these staff were crucial in supporting them in their school leadership role and assisting with the management of their own workload. Headteachers would need to decide how this role could be integrated with other office-based functions and the existing role of the school secretary/school administration officer. The size of the school would have an impact on whether the post would be full time or part time.

### **Other existing support posts**

Although beyond the remit of this research study, it is interesting to note that during the 1960s and 1970s the dominant view on the role of classroom assistants in primary schools was primarily seen in terms of general housekeeping. During the 1980s this view gradually changed particularly in relation to children for who English was not their first language. More recent research by Moyles and Suschitzky from the University of Leicester (1998) indicates that the role of classroom assistants is now more one of supporting children's learning rather than supporting the teacher with routine tasks. The NFER research found that some teachers used the classroom assistant to provide support for administrative tasks, and that they perceived the classroom assistant better suited to providing administrative support (e.g. photocopying) than members of the administrative support staff. This will be discussed later in this chapter.

## 3.2 Survey findings

In the NFER survey headteachers were asked to give information on the number of administrative staff currently working in their school, the number of full time equivalent staff (FTE), and the range of positions held. Tables 3.1 to 3.3 below show that primary school teachers are less likely to have administrative support than their secondary school colleagues. This factor supports the findings of the NUT survey (1998).

### 3.1 The number of administrative staff currently working in school (Secondary Schools)

	%
2	1
3	1
4	8
5	16
6	13
7	13
8	9
9	8
10	6
Over 10	21
Missing	4

(N=143)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

As well as asking about the number of administrative staff employed in schools, headteachers were also asked about the number of full-time equivalent (FTE) posts in schools. The most common response in secondary schools was four FTEs.

Of those secondary schools that responded to the questionnaire, the most common positions that headteachers listed included:

- administrative/clerical assistant
- headteacher's personal assistant/secretary
- bursar/registrar
- finance officer/financial clerk
- secretary
- office manager/head of administration
- receptionist/telephonist.



**3.2 The number of administrative staff currently working in school (Primary Schools)**

	%
1	35
2	43
3	17
4	4
6	1
<hr/> (N=208) <hr/>	

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Of those primary schools that responded to the questionnaire, the most common positions that headteachers listed included:

- administrative/clerical assistant
- administrative/clerical officer
- secretary
- headteacher’s personal assistant/secretary

Headteachers were asked to list the number of full time equivalents (FTEs). The number of FTEs ranged between 0.0 and 5.5. One FTE was the most common response in primary schools.

**Table 3.3 The number of administrative staff currently working in school (Special Schools)**

	%
1	12
2	45
3	31
4	10
6	3
<hr/> (N=78) <hr/>	

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

Twenty one per cent of special school headteachers, who responded to the questionnaire, stated that they had 1 FTE; twelve per cent stated that they had 2 FTE and 23 per cent stated that they had between 2.1 and 5 FTE.

The range of positions held by the administrative staff at the schools varied. Of the special schools who responded, 64 per cent stated that they had an administrative/clerical assistant. Other administrative posts that were mentioned included administrative/clerical officer (45 per cent); headteacher's personal assistant/secretary (22 per cent); and Bursar (17 per cent).

### **3.3 Case study findings**

The arrangements found in the case study schools clearly reflected the findings of the survey: that the most common administrative positions included an administrative assistant/officer, school secretary and headteacher's personal assistant. In addition, secondary schools tended to employ a bursar/accountant who undertook finance-related tasks. In one of the secondary schools, the headteacher was supported by a personal assistant. This was also the case in the special school. In primary schools the school secretary or office manager acted as personal assistant to the headteacher.

#### *Secondary schools*

The case studies found that secondary schools employed a greater number of administrative support staff. Some of the administrative support staff had a clear role allocation. For example, in the two schools below photocopying was undertaken by a member of staff in the reprographics section. In addition, one school employed an examinations officer and an individual responsible for admissions to the school.

#### *Case study A*

The administrative support team was made up of school secretary, finance officer, secretary/receptionist on front desk, part time reprographics person. The off-site 6<sup>th</sup> form also had 25 hours a week administrative support. The School Support Manager managed these roles.

In this school, the School Support Manager was a member of SMT. This position fits in with the 'school business manager' category which O'Sullivan *et al* (2000) described. Although it appeared that aspects of his role were evolving into the 'education resource manager' category.

### *Case study B*

The headteacher reported that there were certain roles that were purely administrative. These included an accountant, bursar, 0.7 FTE examinations officer, headteacher's secretary, secretary for curriculum support, school receptionist and two members of reprographics and an individual who was responsible for admissions. There were also positions which had an element of administrative support. These included the librarian in the learning resource centre, an ancillary member of staff in the learning resource centre, learning support assistants, laboratory technicians, and a technician in the technology department.

The school was in the process of putting in a bid for specialist status and this would provide additional support for teachers.

In this school, the accountant was a member of the leadership team, but not a member of SMT. This fits in with the 'support services manager' role that O'Sullivan *et al* described. The accountant did feel able to discuss things as part of the decision making process. The role of bursar in this school had grown from a secretarial position, supporting what the PricewaterhouseCoopers study (2001a) found in some secondary schools. However, it was the accountant who mainly undertook the bursarial tasks.

### *Primary schools*

Evidence from the case studies showed that primary school teachers were in just as much need of administrative support as their secondary school colleagues. This was particularly true in small primary schools where teachers often had to manage several areas of the curriculum and undertake administration associated with the role of curriculum coordinator. Some primary school curriculum coordinators in the case studies reported that it was this role which had generated additional administration and it was here that they particularly required administrative support. As pointed out in Chapter 2, it was mainly the headteacher who received administrative support. In addition, administrative support staff undertook general school administrative tasks, as illustrated in the examples below.

### *Case study C*

The school employed two members of administrative support staff, a full time office manager (37 hours a week over 52 weeks) and a part time school secretary (18 hours a week, term time only). The Office Manager's main responsibility was acting as the headteacher's personal assistant. Her other duties involved organising and monitoring the school budget, monitoring attendance and keeping personnel data up to date. The School Secretary was responsible for the general administration of the school office. This might include word processing, filing, inputting data, photocopying, and contacting parents. She provided some administrative support to teaching staff, although this appeared to be on an informal and random basis. She had specific tasks to complete on Friday of each week, however these were general school administrative tasks rather than time allocated to supporting teaching staff.

Interestingly, a teacher at this school reported that she felt happier delegating some administrative tasks to the classroom assistant (CA), rather than to the office staff. (Evidence of this was also found in Phase 1 of the case studies.) The teacher was could not explain why she felt happier delegating to a CA except that she felt it was not appropriate to ask office staff to do her photocopying.

### *Case study D*

This is a small village school where the main administrative support staff was the school secretary. However the school also employed a 'peri bursar' and a clerk to the governors (evenings only). The school secretary worked 15 hours a week over 40 weeks and her time was divided between acting as the school secretary (Monday – all day, Tuesday – afternoon, Thursday – morning, and Friday – all day) and as a classroom assistant (Tuesday and Wednesday morning). The school secretary undertook finance-related tasks and general secretarial duties. Each day she had specific administrative tasks to undertake (see Job Descriptions in Appendix 3).

### *Case study E*

The school employed a full time administrative officer (35 hours a week over 52 weeks) and a part time clerical officer (20 hours a week over 40 weeks). The Administrative Officer undertook finance-related tasks, word processing, inputting data, and writing to parents. She acts as a filter to the headteacher and undertook a lot of administrative tasks for the deputy headteacher. She undertook some tasks for teachers, such as ordering classroom resources, some word processing (although not as much as for the headteacher), contacting parents, booking staff development events, creating and inputting spreadsheets for curriculum areas. The Administrative Officer also worked closely with the Assessment Coordinator (a teacher) on inputting pupil data.

The Clerical Officer photocopied documents for meetings and information for staff. Teaching staff did their own photocopying, although the Clerical Officer would get test materials ready at examination time.

The headteacher in Case Study E reported that she would have liked to appoint a personal assistant who would be responsible for filing, maintaining a diary and generally organising the headteacher's day. However, because it was a small school she felt that this was not financially possible at that time. She would have also liked to appoint someone to do photocopying, as teachers currently spent a huge amount of time photocopying literacy support materials. In addition, the headteacher reported that searching for funds could take up a lot of her working day. However, if a grants officer were appointed he or she could spend time getting external funding for all of the schools in the local area. She felt that this would take away some of the workload from headteachers and SMT.

One teacher at this school felt that rather than employing more administrative staff to help teachers, it would be more beneficial to reduce the amount of class contact time that teachers currently had to undertake. She felt that this support would enable teachers to give greater quality in the classroom.

### *Special school*

In this special school the one full time administrative position was used to mainly support the headteacher. This was typical of the small schools visited in the case studies.

#### *Case study F*

The school, which is a Beacon school, employed a full time personal assistant to the headteacher, a part time administrative officer/financial administrator, a part time general clerical officer/ICT unqualified teacher, a part time administrative assistant and a part time librarian.

The personal assistant post had not always been a full time position, but it had increased over the last two years as demands for documentation had increased. Administrative support staff generally undertook general school administrative tasks or tasks on behalf of the headteacher.

Evidence from the case studies showed that administrative posts are increasingly becoming full time positions. This raises issues relating to the training of new and existing staff. These are discussed more fully in Chapter 7.

### **3.4 Key issues/findings**

Findings from the survey and the case studies showed that:

- Secondary schools employed proportionately a greater number of administrative support staff than primary schools.
- The majority of schools in all phases employed an administrative assistant/officer.
- In secondary schools, new administrative positions included that of bursar and personal assistant to headteacher.

In particular, findings from the case studies showed that:

- Administrative posts in all phases of schools were increasingly becoming full time positions.
- Administrative support staff employed in larger secondary schools were more likely to have clear role allocations than primary school colleagues.

- The role of bursars in secondary schools comprised administrative, management and leadership elements.
- In small primary schools the school secretary or office manager acted as a personal assistant to the headteacher.
- Some teachers preferred to delegate administrative tasks to a classroom assistant rather than office staff.
- Primary school teachers had less administrative support than their secondary school colleagues.
- One teacher wanted more non-contact time rather than additional administrative support.

## **4 Funding for administrative tasks to be carried out**

### **4.1 Background**

The Small Schools Fund (formerly the Administrative Support Fund for Small Schools, (ASFSS)), supported through the Standards Fund, was introduced to help small schools (fewer than 600 pupils in secondary schools, fewer than 200 pupils in primary schools, and fewer than 75 pupils in special schools) employ more administrative support staff, provide ICT equipment and the required training, supply cover costs and the purchase of bursarial service. This support was intended to enable teachers and headteachers to carry out their professional paperwork. The value of the fund was increased from £20 million in 1999-2000 to £60 million in 2000-2001.

Resources for administration are clearly important: a 1999 survey of primary headteachers' views on current issues in education asked them to select up to three options to indicate how they would spend a hypothetical five per cent increase in their school budget. Thirty per cent of the 347 headteachers responding to the survey selected the option to purchase increased administrative/secretarial staff, indicating that this was an area that they felt would benefit from increased funding (Felgate and Kendall, 2000).

As more schools employ or promote administrative support staff particularly to positions of managerial responsibilities, the issue of pay, terms and conditions between teaching and support staff may become a source for concern. For example, LEAs have introduced a job evaluation scheme that forms part of the 1997 single-status agreement, which provides a national framework for setting local government workers' pay, terms and conditions but leaves many of the details up for local negotiation. LEAs are encouraging schools to introduce local government pay scales for support staff in schools. This may result in new administrative appointees being paid less than existing administrative support staff.



## 4.2 Overall funding

### 4.2.1 Survey findings

Evidence from Phase 1 case studies showed that headteachers retained overall control of administrative tasks related to the school finance. Thus the questionnaire survey asked headteachers for information about the main sources of funding for administrative support staff. However, it was suggested that they ‘might like to complete this questionnaire in conjunction with a member of the administrative staff’ (questionnaire to headteachers).

Seventy three per cent of primary headteachers reported that the main source was the core school budget. The same source was reported by 72 per cent of secondary school headteachers and 68 per cent of special school headteachers. The funding of administrative support resources also tended to come from the core school budget.

Headteachers were also asked about the proportion of total funding available to schools spent on administrative staff. Tables 4.1 to 4.3 below show that the majority of schools in all phases spent between two and five per cent of the total school budget on administrative staff.

**Table 4.1 Proportion of the total school budget spent on administrative staff (Secondary School Headteachers)**

	%
less than 2 per cent	7
2-5 per cent	54
6-10 per cent	23
11-20 per cent	8
Missing	8

(N=143)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Fifty-two per cent of secondary school headteachers felt that this proportion was about right; 41 per cent felt it was too little; one per cent felt it was too much; and six per cent did not answer the question.

**Table 4.2 Proportion of the total school budget spent on administrative staff (Primary School Headteachers)**

	%
less than 2 per cent	22
2-5 per cent	55
6-10 per cent	13
Missing	11

(N=208)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Thirty nine per cent of primary headteachers said this amount was about right, 55 per cent said it was too little, and one per cent said it was too much.

**Table 4.3 Proportion of the total school budget spent on administrative staff (Special School Headteachers)**

	%
less than 2 per cent	33
2-5 per cent	55
6-10 per cent	4
11-20 per cent	1
Missing	6

(N=78)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Headteachers were also asked to comment on their reasons for saying whether the proportion of total spending on administrative support was about right, too little, or too much. Primary, secondary and special school headteachers gave the following reasons for their answers:

- overall budget was too small
- more staff/time needed to cope with administrative demand
- need to allow teachers to concentrate on teaching
- high quality administration was vital to school success
- can only manage when there was no illness or emergencies amongst staff
- too much when you want/need more teachers.

The survey also asked headteachers if their school was in receipt of the Small Schools Fund. Tables 4.4 to 4.6 show the percentage of schools in receipt of the fund in 2000-2001.

**Table 4.4 Small Schools Fund (Secondary School Headteachers)**

	<b>%</b>
Yes	22
No	74
Not sure	2
Missing	2

(N=143)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

**Table 4.5 Small Schools Fund (Primary School Headteachers)**

	<b>%</b>
Yes	50
No	47
Not sure	2
Missing	1

(N=208)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

**Table 4.6 Small Schools Fund (Special School Headteachers)**

	<b>%</b>
Yes	80
No	14
Not sure	5
Missing	1

(N=78)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Of those headteachers who responded to this questionnaire special schools and primary schools were more likely to be in receipt of the Small Schools Fund. This was partly due to the numbers of schools in the sample falling into the ‘small’ category, as explained in Appendix 1 (Section A1.3).

For those schools in receipt of the Small Schools Fund, headteachers were asked to indicate how they had used the fund in the course of the year. Tables 4.7 to 4.9 show that secondary, primary and special schools had used the fund to increase the time allocated to existing administrative staff.

**Table 4.7 How the Fund had been used (Secondary School Headteachers)**

	%
To increase the time allocation of existing administration staff	77
To appoint additional administration staff	61
To enhance the ICT resources used for administration	32
To pay for training for administrative staff	10
To purchase bursarial services	10
To provide supply cover for headteacher/teaching staff to carry out professional paperwork tasks	7
Other	7
<hr/>	
(N=31)	

*Survey participants were able to give more than one response*

**Table 4.8 How the Fund had been used (Primary School Headteachers)**

	%
To increase the time allocation of existing administration staff	81
To provide supply cover for headteacher/teaching staff to carry out professional paperwork tasks	48
To provide secretarial/administrative support for yourself/SMT.	35
To appoint additional administration staff	28
To enhance the ICT resources used for administration	23
To pay for training for administrative staff	20
To provide opportunities to mentor/monitor colleagues	14
To purchase bursarial services	12
Other	4
<hr/>	
(N=103)	

*Survey participants were able to give more than one response*

Interestingly 48 per cent of primary school headteachers who responded to the survey stated that they had used the fund to provide supply cover for themselves and teaching staff and 35 per cent had used the fund to provide secretarial support for themselves and SMT.

**Table 4.9 How the Fund had been used (Special School Headteachers)**

	%
To appoint additional administration staff	44
To enhance the ICT resources used for administration	34
To provide supply cover for headteacher/teaching staff to carry out professional paperwork tasks	26
To pay for training for administrative staff	24
To provide secretarial/administrative support for yourself/SMT	18
To purchase bursarial services	10
To provide opportunities to mentor/monitor colleagues	2
Other	5

(N=62)

*Survey participants were able to give more than one response*

Thirty four per cent of special school headteachers reported that they had used the fund to enhance ICT resources for administration. The use of ICT for administrative tasks is discussed more fully in Chapter 8.

In addition, headteachers were asked if the overall amount spent on administration throughout the school in 2000-2001 had changed in relation to 1999-2000. Eighty three per cent of secondary school headteachers, 63 per cent of primary school headteachers and 64 per cent of special school headteachers said that the overall amount spent on administration throughout the school year had increased that year.

### **4.3 Priorities if funding for administrative support were increased**

#### **4.3.1 Survey findings**

Following on from research by Felgate and Kendall (2000), the survey also asked headteachers to indicate which of the following would be their priorities for increased spending, if funding to support administrative functions were increased by five per cent. As Tables 4.10 to 4.12 show, secondary school headteachers preferred to employ more administrative staff, whereas primary and special school headteachers preferred to spend the five per cent on more time for existing administrative staff.

**Table 4.10 Priorities (Secondary School Headteachers)**

	%
More administrative staff	48
(Extra) administrative support for heads of department	41
(Extra) administrative support staff for year heads/form tutors	34
(Extra) administrative support for subject teachers	23
Enhanced ICT provision for administrative tasks	23
Extra administrative support for yourself/SMT	18
More time allocated to existing administrative staff	15
(Extra) training for administrative staff	14
(Increased) bursarial support	11
ICT training/support for teachers for administration	6
Supply cover for headteacher/teaching staff to carry out professional paperwork tasks	4
Other	20
None ticked	1
<hr/> (N=143) <hr/>	

*Survey participants were able to give more than one response*

‘Other’ priorities included better or more accommodation.

**Table 4.11 Priorities (Primary School Headteachers)**

	%
More time allocated to existing administrative staff	44
Supply cover for headteacher/teaching staff to carry out professional paperwork tasks	33
More administrative staff	32
Extra administrative support for yourself/SMT	25
Enhanced ICT provision for administrative tasks	22
(Extra) administrative support for curriculum coordinators	21
(Extra) administrative support for class teachers	19
(Increased) bursarial support	16
(Extra) training for administrative staff	14
ICT training/support for teachers for administration	8
(Extra) administrative support staff with pastoral responsibilities	3
Other	16
<hr/> (N=103) <hr/>	

*Survey participants were able to give more than one response*

Although 16 per cent stated ‘other’, they did not expand.

**Table 4.12 Priorities (Special School Headteachers)**

	%
More time allocated to existing administrative staff	33
Extra administrative support for yourself/SMT	28
More administrative staff	26
(Extra) administrative support for curriculum coordinators	26
Enhanced ICT provision for administrative tasks	23
(Increased) bursarial support	22
(Extra) administrative support for class teachers	21
ICT training/support for teachers for administration	15
(Extra) training for administrative staff	14
Supply cover for headteacher/teaching staff to carry out professional paperwork tasks	13
(Extra) administrative support staff with pastoral responsibilities	9
Other	23
<hr/>	
(N=78)	

*Survey participants were able to give more than one response*

‘Other’ included better and more accommodation for administrative staff.

The tables showed that whilst secondary school headteachers had spent the Small Schools Fund on increasing the time allocation of existing administrative staff, they would appoint more administrative staff if funding to support administrative functions were increased by five per cent. Primary school headteachers would like to continue to fund the time allocation of existing administrative staff and provide supply cover for themselves and teaching staff. Special school headteachers would like to fund extra administrative support for themselves and SMT.

School administrators were also asked to comment on what would be their priorities for spending; results mirrored those of the headteachers. Among secondary school administrators 54 per cent stated that they would like more administrative staff. Fifty three per cent of primary school administrators stated that they would like more time to be allocated to existing administrative staff. This priority was indicated by 49 per cent of special school administrators.

#### **4.3.2 Case study findings**

Evidence from Phase 1 case studies found that where a team of administrative staff was employed, financial administration was often delegated by the headteacher to a

finance officer or bursar. In small schools with only one administrator, the financial tasks were shared between the headteacher and administrator. For this reason researchers directed questions relating to finance to the headteacher and administrator.

#### *Secondary schools*

Neither of the two secondary schools visited in the second phase of case study visits was in receipt of the Small Schools Fund. In case study A, administrative support was funded through the school budget with an allocated amount each year being spent on administrative support. Although Case Study B also funded administrative support through the school budget there was no specific amount targeted each year for administrative support. Additionally, the School Support Manager in Case Study A indicated that if given the opportunity the school would appoint additional administrative support staff to help teachers.

#### *Primary schools*

Two out of the three primary schools visited were in receipt of the Small Schools Fund. Both schools used the fund to increase the time allocation of existing administrative staff.

#### *Case study D*

In this small village primary school the Small Schools Fund had enabled the school secretary to work an extra 3 hours a week over 40 weeks. During this time she operated the Bank Account for Schools Scheme. A parent used to undertake this activity.

#### *Case study E*

The Small Schools Fund enabled the headteacher to extend the existing part time administrative officer to a full time post. The Clerical Officer was paid for out of the school budget.

#### *Special school*

Findings from the NFER survey data showed that the majority of special school headteachers used the Small Schools Fund to increase the time allocation of existing



administrative staff. However, the special school visited in the second phase of the research project had used the money to appoint an additional member of staff with some degree of administrative responsibility.

*Case study F*

This school had received the Small Schools Fund which had mainly been spent on additional literacy support (ALS). However, some of the funds had been used to appoint a part time librarian (12 hours a week) who had a joint librarian/administrative support role.

Administrative support staff were also asked how they would spend the administrative support budget if given more money. Three administrative support staff highlighted the low pay of support staff. One member of the support staff argued that *'why don't we get more money for working hard...'* Many of the administrative support staff interviewed felt that they were increasingly taking on more responsibilities yet their pay did not reflect this. Although they did not have teaching qualifications and experience, they felt that they fulfilled important functions and added value to the school. Moreover, some felt that their managerial skills were not being taken into account. For example, one member of staff noted that members of SMT got *'handsomely paid'*, but did not have any managerial training or experience. This could lead to a divide between teachers and support staff.

Although not directly related to the remit of this study, it is worthwhile to note that the Administration Officer in case study E reported that she would have a bigger office, as she felt that a more comfortable working environment is very important. Other administrative support staff also identified problems with the physical environment of the office. Perhaps this may increasingly become an issue as the number and functions of administrative support staff expand in schools. The school offices visited during the second phase of the case studies were small and often crowded with staff. This made it very difficult when trying to explain how an administrative task should be completed. A PricewaterhouseCoopers (2001a) study which examined how capital expenditure is linked to pupil attainment concluded that there are strong links between the physical environment and teacher and pupil motivation, which were themselves

identified as being strongly linked to pupil performance (PricewaterhouseCoopers, 2001b).

#### **4.4 Key issues/findings**

Findings from the survey showed that:

- Headteachers spent between two and five per cent of the total funding available on administrative staff.
- Headteachers preferred to spend the Small Schools Fund on increasing the hours of existing staff (also supported by case studies).

Findings from the case studies showed that:

- Bursars in larger secondary schools undertook finance-related tasks, whereas finance-related tasks were shared between the headteacher and the administrator in smaller schools.
- Some administrative staff, particularly in secondary schools, felt their skills were undervalued.
- Some administrative staff felt underpaid.
- Administrative support staff identified problems with the current state of the physical environment and capital expenditure.



## **5 Administrative tasks carried out by teaching staff**

### **5.1 Teacher tasks/school tasks**

As outlined in Chapter 2, there is a wide range of structures in place in schools for dealing with administrative tasks. However, a broad distinction that can be applied to all schools is between those tasks associated directly with the work carried out by teaching staff, and those tasks associated with the wider management of the school. The former are largely carried out by teaching staff, although may to some extent be delegated to other school personnel (the extent and nature of such delegation is considered in the following chapter). The second group of tasks identified are mostly carried out by staff employed as administrators, within the school office.

The focus of the remaining sections of this chapter, and this study as a whole, are the administrative tasks being carried out by teaching staff within schools, or those tasks for which they have responsibility, but have delegated. However, it is important to recognise the significance of the office-based school administrative tasks, both in terms of their strategic importance to the running of the school, and as part of an overall understanding of the context within which teaching administration is carried out. The previous section has outlined the structural implications of the distinction between teaching and office-based administrative tasks (as defined above). This section serves to underline this distinction, before the main discussion of administrative tasks and teaching staff.

Clear differences have arisen throughout this study in terms of those tasks which individual schools and members of staff consider to be appropriate for teachers to carry out. These issues will be addressed in the following sections. Chapter 6 of this report will outline those teaching-related administrative tasks that are carried out by office-based staff, and address specific issues relating to the recent delegation of administrative tasks by teachers, and obstacles to such delegation.

## **5.2 Teaching staff and administrative tasks**

### **5.2.1 Background**

Research published in 1998 by Coopers & Lybrand identified a range of activities carried out by teachers, which could be more appropriately performed by others. Other studies have supplied similar lists (Downes *et al.*, 2000; NUT, 1998) to that provided by Coopers & Lybrand, which is as follows:

- collecting money
- chasing absences
- bulk photocopying
- copy typing
- standard letters
- attendance analysis
- copying out lists
- preparing report sets
- processing exam marks
- administering work experience
- administering/clerking examinations
- administering the pastoral system
- administration of progression
- IT/AV/multimedia systems technician.

Planning lessons, monitoring outcomes and marking and assessment have all been identified as part of the overall administrative burden on teachers (Hulusi *et al.*, 2000; NUT, 1998; Funding Agency for Schools, 1998). More recent research carried out as part of the Teacher Workload Study (PricewaterhouseCoopers, 2001a) provided a similar list of administrative tasks being carried out by teaching staff. In the study administrative tasks were divided into two types: those related to the core work of teaching such as lesson planning, marking pupil work, reporting to parents and school trip administration, and other, more general tasks. The 'general' administration included tasks such as record keeping, organising resources and premises, photocopying, form filling and data entry. It was noted that teaching staff in the primary, secondary and special school phases were respectively spending an average of 1.6, 2, and 2.3 hours per week on these general tasks.

### **5.2.2 Survey findings**

All teaching staff who took part in the survey reported on the administrative tasks they carried out. The tasks described by teachers were largely similar to those discussed in previous research (as outlined above). Teachers participating in the survey were asked to indicate the frequency with which each task was carried out. The main tasks reported by teachers as being carried out on a daily basis were registration; preparing resources/materials; photocopying; marking; and lesson planning. The main weekly task was lesson planning. On a termly basis teachers prepared IEPs; administered, monitored, and reviewed SEN; prepared report sets; administered examinations/ assessments; processed examinations/national curriculum marks; analysed pupil performance data; and undertook work relating to school policy making/target setting.

Teachers also reported that they carried out a considerable number of tasks outside of school hours. For example: contacting parents; lesson planning; photocopying; preparing resources/materials; marking; preparing IEPs; administering SEN; and analysing attendance data were all done either before or after the set school day.

### **5.2.3 Case study findings**

The Phase 2 visits to case study schools revealed a range of administrative tasks being carried out by teachers that was, if anything, wider than that reported in the survey as outlined above. In addition, discussions with teaching staff during case study visits enabled the NFER team to explore the way teachers viewed the administrative tasks they carried out, and the way they categorised those tasks.

Teaching staff in the two secondary schools listed the following tasks as those associated with their role as a teacher (tasks associated with areas of additional responsibility are considered in the following section of this chapter):

- target setting
- reporting to parents
- adjusting to changes in the syllabus
- coordinating examination entries

- administrative tasks related to application for funding streams, e.g. application for funding through NGFL (national grid for learning)
- administrative tasks relating to detentions e.g. issuing referral slips to form tutors
- administration relating to bad behaviour e.g. school report system
- tasks related to being a newly qualified teacher e.g. observations of other teachers and writing and filing statements
- keeping records of marks in mark-books, then entering them onto the school data management system (an example of a duplicated task)
- chasing incomplete homework, and recording information about pupils have not handed work in.

Teaching staff in secondary schools who were also form tutors identified certain tasks as linked to the form tutor role. These included:

- taking the register
- processing referral forms for detention (and follow-up)
- contacting parents about problems with their child
- administration related to pupil sick notes
- completing permission slips for pupils who needed to leave the classroom
- collecting money from pupils e.g. for school trips
- tasks arising from informal chats with pupils.

It was noted in one secondary school that there was a peak during Years 9 and 10 when form tutors were most likely to be contacting parents regarding discipline problems with their child. It was also noted that the school rotated form tutors throughout the years so this burden was felt evenly by all staff.

In the three primary schools visited, teaching staff also detailed several administrative tasks related to their role as a class teacher. It is important to note that while this list may appear shorter than that for secondary school teachers, the majority of primary teaching staff had responsibility for at least one curriculum area. The administrative tasks experienced by most members of teaching staff were therefore likely to be a combination of those listed below, and those summarised in the following section of

this chapter. Teaching related administrative tasks mentioned during case study interviews included:

- photocopying e.g. worksheets for lessons
- marking and filing of work in workbooks/folders
- writing lesson plans (in-depth plans for literacy and numeracy, plus briefer plans for other subjects)
- tasks related to termly reporting to parents.

Teachers in the special school identified the following administrative tasks as part of their role:

- lesson planning
- completing objective sheets, one for each individual pupil
- marking
- assessments and evaluation of pupil performance
- pupil monitoring – keeping daily records of pupil progress
- completing records of achievement
- letter writing
- organising school trips
- providing social and emotional support for pupils through the use of counselling skills
- responding to pupil medical issues.

### **5.3 School heads of department/curriculum coordinators and administrative tasks**

#### **5.3.1 Background**

Members of teaching staff in schools with particular responsibility for a curriculum area or department experienced additional administrative tasks related to that responsibility, over and above those tasks associated with the work of being a teacher. The implications of these additional tasks were discussed in the Teacher Workload Study: *‘The need to fit an ongoing teaching commitment around management duties usually leads to [middle and senior managers] working longer hours than teachers without management responsibilities, as often, time for their own planning and*



*preparation is squeezed out by other school commitments'* (PricewaterhouseCoopers, 2001a).

### **5.3.2 Survey findings**

Heads of department and curriculum coordinators were asked about the administrative tasks they carried out. As Tables 5.1 to 5.3 show, the most commonly reported tasks were: setting up departmental meetings and reporting to the headteacher/senior management team. Line management responsibilities and monitoring colleagues' lesson plans were also frequently indicated.

**Table 5.1 Administrative tasks carried out by secondary school heads of department**

	<b>%</b>
Setting up departmental meetings	99
Reporting to the headteacher/SMT	98
Line management responsibilities	97
Monitoring colleagues' lesson plans	90
Analysing performance data	85
School policy making and target setting	76
Processing exam/national curriculum assessment marks	76
Developing departmental plans	75
<b>(N=122)</b>	

*Survey participants were able to give more than one response*

**Table 5.2 Administrative tasks carried out by primary school curriculum coordinators**

	<b>%</b>
Setting up departmental meetings	89
Monitoring colleagues' lesson plans	88
Reporting to headteacher/SMT	82
Liaison with colleagues on departmental matters	78
Developing curriculum plans	75
School policy making and target setting	70
Line management responsibilities	70
Preparing for/responding to school inspection	65
<b>(N=131)</b>	

*Survey participants were able to give more than one response*

**Table 5.3 Administrative tasks carried out by special school heads of department/curriculum coordinators**

	%
Reporting to headteacher/SMT	96
Setting up departmental meetings	93
Line management responsibilities	89
Monitoring colleagues' lesson plans	89
Liaison with colleagues on departmental matters	87
Preparing for/responding to school inspection	82
Developing curriculum plans	80
School policy making	80
<hr/> (N=45) <hr/>	

*Survey participants were able to give more than one response*

### **5.3.3 Case study findings**

During case study interviews, heads of department and curriculum coordinators in schools of all phases identified a wide range of administrative tasks associated with their management responsibility. For secondary school heads of department these included:

- coordinating pupil submission of coursework – monitoring work handed in, and filing
- work related to exam entries
- processing external exam results (particularly for modular courses with termly exams)
- issuing exam results to parents (inputting the data, writing a letter, carrying out a mail merge, printing letters, issuing to students)
- maintaining resources
- overseeing delivery of the curriculum in the department
- maintaining an overview of teacher performance
- working with data – monitoring pupil performance, and analysing in terms of impact by member of staff
- departmental target setting
- preparing department policy papers
- production of set lists and timetables
- coordinating rotations of groups (e.g. in technology department – class groups rotate around different technology areas)
- trawling the internet for support materials/resources

- organising departmental trips.

The above administrative tasks are those associated with management responsibility for a subject department. One head of department interviewed in a secondary school had responsibility for the learning support department in the school. This member of staff identified particular tasks associated with that role:

- contact with parents
- contact with all external agencies (e.g. educational psychology service, occupational therapists)
- completing LEA monitoring and evaluation forms, and LEA questionnaires/data requests
- administration related to pupil annual review including: circulating advice, reminders of meeting to parents/carers, carrying out the meeting, follow-up paperwork
- planning interventions for pupils
- writing notes for registers
- informing tutors and pupils about interventions
- logging all that was discussed when meeting with parents, keeping records of all communications
- preparing adapted timetables for pupils with special educational needs.

The key difference between departmental/curriculum responsibility in secondary and primary schools is that in secondary schools one member of staff usually only has responsibility for one curriculum area, whereas in a small primary school it is not unusual for a teacher to have management responsibility for several subjects. Primary school curriculum coordinators identified many administrative tasks associated with their role:

- resourcing the subject area
- monitoring and observing lessons as part of performance management
- parental reporting
- coordinating parental involvement in school activities (e.g. resourcing take-home activity bags and checking books in and out)
- parental induction evenings

- disseminating information to other school staff after attending staff development courses
- responding to LEA data requests
- preparing policies for the curriculum area
- holding monthly school-wide meetings with staff regarding the curriculum area
- termly LEA meetings for coordinators of each curriculum area
- carrying out administration related to development of a new play area at the school e.g. obtaining quotes for tender, and planning permission
- completing applications for funding for activities, and if successful, subsequently monitoring and evaluating.

In the case study special school visited, staff with responsibility for a subject department/curriculum area identified the following administrative tasks as connected to their role:

- collating pupil performance results (CAT and SAT scores)
- analysing pupil achievement
- attending training courses e.g. how to enter data to school data management system (it was anticipated that this member of the teaching staff would, following training, take over the input of data to the system from the school administrator)
- organising Learning Support Assistants
- monitoring teachers as part of performance management – including observations and review of lesson plans
- running formal appraisal systems for departmental staff.

## **5.4 Perceived appropriateness of administrative tasks for teaching staff and heads of department/curriculum coordinators**

### **5.4.1 Background**

There has been a growing recognition, both in research and policy, of those administrative tasks that are inappropriate to the role of teaching staff. In a DfES pamphlet published in 2001, the Secretary of State for Education and Skills noted a need to *'liberate teachers by stripping away those tasks which could more sensibly undertaken by administrators'* (Morris, 2001). A review of teacher contracts

published by the Institute for Public Policy Research stated that ‘*contractual duties should be redrafted to exclude all clerical and administrative tasks*’ (Johnson, 2001).

The following section will summarise those administrative tasks that teachers felt were inappropriate to their core responsibilities within the school. However, it is important to recognise that there is no clear dichotomy of tasks perceived to be appropriate and inappropriate. Many administrative tasks that teachers felt to be an inappropriate use of their time were intrinsically tied to an overall demand that they believed to be central to their role. When considering activities central to teaching, it is crucial to disentangle the administrative aspects of the activity that teachers feel are inappropriate to their role from those aspects of the same activity that are an appropriate use of teacher time. In the final report of the teacher workload study, PricewaterhouseCoopers cite lesson planning as an example of an activity considered essential and valuable by teachers, but administratively labour intensive.

The next section will summarise tasks teaching staff in schools have stated to be appropriate and inappropriate to their role. Issues surrounding the possible interplay of these issues with those surrounding the delegation of tasks are addressed in Chapter 6.

#### **5.4.2 Survey findings**

Heads of department and curriculum coordinators were asked how appropriate they felt the administrative tasks they carried out were to their role in the school.

##### *Secondary schools*

Heads of department in secondary schools stated that most of the administrative tasks they carried out were appropriate to their role. Those tasks indicated as appropriate by the highest percentages of heads of department are shown in Table 5.4:

**Table 5.4 Administrative tasks felt to be appropriate to the role of secondary school heads of department**

	%	N
Setting up departmental meetings	98	121
Reporting to head/senior management team	98	120
Line management responsibilities	98	121
Liaison with colleagues on departmental matters	93	115
Monitoring colleagues' lesson plans	93	118
Developing departmental plans	92	115

*Survey participants were able to give more than one response*

However, there were particular tasks that a large proportion of heads of department felt were inappropriate to their role in the school. These are shown in Table 5.5:

**Table 5.5 Administrative tasks felt to be inappropriate to the role of secondary school heads of department**

	%	N
Collecting money	68	102
Chasing absences	66	99
Administering exams/national curriculum assessments	66	112
Photocopying	63	101
Analysing attendance data	63	93
Processing exam/national curriculum assessment results	55	115

*Survey participants were able to give more than one response*

#### *Primary schools*

As with secondary school heads of department, on the whole primary school curriculum coordinators felt that the tasks they undertook were appropriate to their position. Those tasks that the highest percentages of curriculum coordinators felt were appropriate to their role are shown in Table 5.6:

**Table 5.6 Administrative tasks felt to be appropriate to the role of primary school curriculum coordinators**

	%	N
Reporting to head/SMT	97	128
Liaison with colleagues on curriculum matters	95	125
Setting up curriculum meetings	92	125
Monitoring colleagues' lesson plans	91	126
Developing curriculum plans	89	122
Work relating to school policy making	89	123

*Survey participants were able to give more than one response*

However, there were some tasks which curriculum coordinators felt were inappropriate to their role. These tasks, along with the percentages of curriculum coordinators that felt that they were inappropriate are shown in Table 5.7.

**Table 5.7 Administrative tasks felt to be inappropriate to the role of primary school curriculum coordinators**

	%	N
Chasing absences	68	96
Collecting money	65	97
Analysing attendance data	63	98
Photocopying	53	111

*Survey participants were able to give more than one response*

#### *Special schools*

As with secondary and primary school heads of department/curriculum coordinators, staff in these posts in special schools felt that most of the administrative tasks they carried out were appropriate to their role. Those tasks believed by the highest percentages of heads of department/curriculum coordinators to be appropriate to their role are shown in Table 5.8:

**Table 5.8 Administrative tasks felt to be appropriate to the role of special school curriculum coordinators**

	%	N
Reporting to headteacher/SMT	98	45
Setting up curriculum meetings	96	44
Liaison with colleagues on curriculum matters	96	44
Developing curriculum plans	93	43
Work relating to school policy making	93	44
Administering SEN monitoring/review process	90	43

*Survey participants were able to give more than one response*

In schools of all phases, heads of department/curriculum coordinators indicated their view that the majority of the administrative tasks they were asked to undertake were an appropriate part of their role in the school. Tables 5.4, 5.6 and 5.8 show a high level of commonality among heads of department/curriculum coordinators in secondary, primary and special schools as to those administrative tasks that they feel are appropriate to their role. Reporting to the headteacher or SMT, setting up departmental/curriculum meetings and liaising with colleagues on department/curriculum matters are considered by a very high percentage of heads of

department and curriculum coordinators to be an appropriate part of their role. In secondary schools administration associated with the line-management of departmental colleagues was also identified as an appropriate task by a very high percentage of heads of department.

Table 5.9 provides a summary of those tasks that special school heads of department/curriculum coordinators felt to be inappropriate to their role in the school:

**Table 5.9 Administrative tasks felt to be inappropriate to the role of special school curriculum coordinators**

	%	N
Collecting money	64	37
Chasing absences	62	37
Analysing attendance data	53	45
Photocopying	51	42

*Survey participants were able to give more than one response*

Tables 5.5, 5.7 and 5.9 summarised those tasks that the highest percentages of heads of department/curriculum coordinators believed to be an inappropriate use of their time. These tables illustrated a shared view among staff with departmental or curriculum responsibilities in schools of all phases, that the following four tasks that they regularly carried out were inappropriate to their role in the school:

- collecting money from pupils
- chasing absences
- analysing attendance data
- photocopying.

It is important to note that these four tasks are all clearly distinguishable from the process of teaching itself, and also from the management demands of the department. Instead, these tasks are connected with the wider running of the school, and the administrative staffing structures and processes established within it. Clearly, as the structural context of a school varies so will the experience of the staff within it. The next section of this chapter will build on these survey findings by exploring the experiences of the heads of department/curriculum coordinators within the case study schools visited by the NFER team.



### 5.4.3 Case study findings

During case study interviews, both teachers and heads of department/curriculum coordinators were asked whether they felt the administrative tasks they carried out were appropriate to their role. The views of teaching staff varied, with some staff stating that all administration was inappropriate to their role, and others articulating the opposite view. The majority of teaching staff, however, described certain tasks as appropriate to their role, and others as inappropriate. In general, primary and special school teachers and heads of department/curriculum coordinators were more accepting of the administrative tasks they carried out than were their secondary school colleagues. The views of teaching staff in each phase are outlined in this section.

The overall view of teaching staff interviewed in secondary schools was that some administrative tasks were appropriate to the role of teachers and heads of department, and indeed, were beneficial to the role. A frequently stated example was that of administration relating to pupil target setting. Tasks such as inputting attainment data, printing out and reviewing previous targets and analysing recent performance were all considered to be appropriate, and valuable. Similarly, the SENCO in a secondary school visited observed that they '*moaned endlessly*' about administrative tasks, but felt that it was sometimes invaluable to have things recorded on paper. This member of staff felt that it was important to try and find a balance between the time taken to carry out a task, and the possible benefit of doing so.

One task felt to be inappropriate to teaching staff in both secondary schools visited by the NFER team was collecting money from pupils (e.g. for school trips). In one school the internal systems surrounding the task required that form tutors collected money from pupils, filled in a form and passed the money to the school office. One teacher interviewed clearly stated '*this is not my job*'. A second task felt to be inappropriate to the role of teaching staff in one of the secondary schools visited was that of working out the percentages and totals for pupil attendance. These tasks were both related to the demands of a form tutor post. One teacher interviewed felt strongly that carrying out an increasing number of administrative tasks during tutor time could lead discipline problems in the tutor group. The same form tutor also noted that she liked to take pupil money straight to the school office following tutor time, which could mean being late for the first lesson of the day.

As outlined above, in secondary schools, the acceptance of the appropriateness of certain administrative tasks was largely based on the value it was felt they added to the teaching process. In primary schools, however, the acceptance of tasks was generally more passive, based on a belief that there was no alternative to the situation, and that the tasks were 'part of the job'. As one teacher commented: *'Teaching is the priority, but at the end of the day I still have to do the admin – no-one is going to do it for me!'* Therefore while primary school teaching staff may not have actively felt that the administrative tasks they carried out were appropriate to their role, they were generally viewed as an integral part of it, even if they were believed to have no positive impact on the teaching process.

Primary school curriculum coordinators identified several administrative tasks that they found time-consuming, but that were believed to be appropriate to the responsibility held. These included writing policy documents and responding to LEA data requests. It was stated, however, that administration such as the data processing and mass photocopying associated with the above tasks was inappropriate to the role of curriculum coordinators, and would be better carried out by other staff in the school.

Teaching staff in special schools noted that certain administrative tasks were appropriate to the role of teachers and heads of department/curriculum coordinators. The most frequently mentioned of these were administrative tasks associated with lesson planning, and with making alterations to the national curriculum in order that it could be made suitable for the pupils at the special school. Certain administrative tasks were not felt to be appropriate to the roles of teaching staff, but it was stated that there was no one else in the school who could carry them out. These included preparing paperwork for OFSTED, collating information for monitoring and evaluation and administration relating to the performance management of colleagues.

## 5.5 Changes in the amount and type of administrative tasks undertaken by teachers

### 5.5.1 Background

Recent investigations into teacher workloads have reported increases in the time being spent by teaching staff on administrative tasks (School Teachers' Review Body, 1994a and b; PricewaterhouseCoopers, 2001a; NUT, 1998; Coopers & Lybrand, 1998). The centrality of this issue to the debate surrounding teacher morale and motivation, and consequent discussions of the recruitment and retention of teaching staff is also clear (Spear *et al.*, 2000). For these reasons, data were collected through both the survey of schools, and the Phase one and 2 case study visits, related to the changes that teaching staff perceived to have taken place in the amount and type of administrative tasks they were carrying out on a regular basis. This section of the chapter outlines the findings of this research.

### 5.5.2 Survey findings

Heads of department/curriculum coordinators and teachers were asked to indicate whether there had been any change in the overall level of administration that they had carried out, over the last year.

*Secondary schools*

**Table 5.10 Degree of change in overall level of administration  
(Secondary School Heads of Department)**

	%
Increased	78
Reduced	5
No change	15
Missing	3

(N = 122)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

**Table 5.11 Degree of change in overall level of administration  
(Secondary School Teachers)**

	%
Increased	69
Reduced	6
No change	23
Missing	2

(N=325)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Tables 5.10 and 5.11 show that secondary school heads of department and teachers had very similar views about recent changes in the overall level of administration they had to carry out. Over two-thirds of secondary school heads of department and teachers felt that there had been an increase in the level of administration they had to undertake, with only a small proportion believing that there had been a reduction. This was a consistent pattern across all phases, as shown in Tables 5.12 to 5.15 below:

*Primary schools*

**Table 5.12 Degree of change in overall level of administration  
(Primary School Curriculum Coordinators)**

	%
Increased	67
Reduced	5
No change	28

(N = 131)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

**Table 5.13 Degree of change in overall level of administration  
(Primary School Teachers)**

	%
Increased	66
Reduced	4
No change	28
Missing	2

(N=224)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

*Special schools*

**Table 5.14 Degree of change in the overall level of administration (Special School Heads of Department)**

	<b>%</b>
Increased	71
Reduced	2
No change	27
<b>(N = 45)</b>	

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

**Table 5.15 Degree of change in overall level of administrative (Special School Teachers)**

	<b>%</b>
Increased	68
Reduced	5
No change	27
Missing	1
<b>(N=83)</b>	

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

Teachers of all phases reported that the effects of this increase on their teaching meant that there was less time for lesson planning, preparation and marking. However many stated that this increase had had little or no effect on pupils' learning. Issues relating to the impact of administrative tasks on teaching and learning are addressed more fully in Chapter 9.

In addition to the self-reported increases shown in Tables 5.10 to 5.15, heads of department and curriculum coordinators were asked whether there had been any changes in the overall level of administration carried out by other teaching staff in their department (non-heads of department/curriculum coordinators). The analysis of these questions revealed that in all phases the perceived level of administration undertaken by other departmental teaching staff had increased.

### **5.5.3 Case study findings**

The headteachers, teachers and heads of department/curriculum coordinators interviewed during the case study visits to schools articulated opinions similar to those revealed in the survey findings above. The overwhelming majority of staff from

all phases felt that the amount of administration being carried out by teaching staff in schools had increased. Teaching staff tended to answer the question in terms of their assessment of the change in the level of administration over their career, thus the pace of change, or the period over which it was felt to have occurred, was often linked to the length of career of the interviewee.

The NFER team carrying out the Phase 2 case study interviews observed an apparent relationship between the length of time an interviewee had been a teacher, and their assessment of any increase in administration related to the job. One teacher of four years reported not having noticed any growth in the amount of administrative tasks she was carrying out over this period, but noted that ‘older’ teachers may have felt differently. A teacher of six years stated that there had been a gradual increase in the administrative demands made on him since joining the profession, while members of staff with 10 and 14 years experience respectively felt that they had never worked so hard, and that the amount of administration associated with teaching had increased incredibly over that period.

Headteachers in three schools strongly supported these views of their teaching staff. One primary headteacher stated that the level of administration for teachers had increased until it had recently become ‘*ridiculous*’. One headteacher in a secondary case-study school felt that there had been an increase in the amount of administration carried out by teachers, such that teaching was now more difficult than when the headteacher joined the profession. The same headteacher also observed that ‘*for every burden taken off, another is added*’. The headteacher of the special school visited echoed these views, noting that the administrative demands made of teaching staff were growing all the time.

## **5.6 New administrative tasks**

### **5.6.1 Survey findings**

In an open question on the questionnaires, both heads of department/curriculum coordinators and teachers were asked to give details of any new tasks that they were carrying out. The lower percentages for the staff indicating the options highlighted in the tables below, in comparison to those in other tables in this report, are a

consequence of the wide range of responses provided in answers to open questions. Those tasks mentioned most frequently by staff are those included in the tables in this section, to provide an overview of those responses with a degree of commonality.

*Secondary schools*

**Table 5.16 New tasks being carried out by secondary school heads of department**

	%
Tasks related to new examination courses	21
Introduction of literacy/numeracy strategy	20
Performance management tasks	17
Data analysis/data management	13
New assessment tasks	12
Target setting	11

(N=122)

*Survey participants were able to give more than one response*

**Table 5.17 New tasks being carried out by secondary school teachers**

	%
Tasks related to new examination courses	12
New pupil reporting methods	10

(N=325)

*Survey participants were able to give more than one response*

*Primary schools*

**Table 5.18 New tasks being carried out by primary school curriculum coordinators**

	%
General subject management tasks	12
Target setting	12

(N=131)

*Survey participants were able to give more than one response*

**Table 5.19 New tasks being carried out by primary school teachers**

	%
Tasks related to teacher assessment	15
Effects of change in role/increased responsibility	13
Target setting	13

(N=224)

*Survey participants were able to give more than one response*

### *Special schools*

**Table 5.20 New tasks being carried out by special school curriculum coordinators**

	%
Effects of change in role/increased responsibility	13

(N=45)

*Survey participants were able to give more than one response*

**Table 5.21 New tasks being carried out by special school teachers**

	%
Subject planning	12
Changes to examination courses	11
New subject related tasks	10
New pupil reporting methods	10

(N=83)

*Survey participants were able to give more than one response*

### **5.6.2 Case study findings**

Staff in schools of all phases outlined new administrative tasks that they were now carrying out. These are listed below, for secondary, primary and special schools:

New administration in secondary schools included tasks related to:

- new curriculum initiatives, such as the literacy strategy at key stage 3
- introduction of A/S levels; in particular, a head of the science department in one school noted that there is now double the amount of practical assessment related administration. A second teacher observed that this also meant that pupils were taking more subjects, so there are more pupils taking each subject, meaning a consequent increase in tasks such as performance recording
- staff performance management: one head of department reported spending more time observing colleagues and carrying out formal written work connected with their review
- school trips: one head of department stated that new guidance on school trips meant that more elaborate preparations now have to be made
- target setting for individual pupils
- production of IEPs for pupils with SEN
- twice-yearly pupil assessment
- schools' application for specialist status.



New administration in primary schools included tasks related to:

- lesson planning; it was stated that while good teachers have always planned lessons, there is a new emphasis on formalising written schemes of work, and on developing new resources following the introduction of new initiatives
- accountability and recording/reporting of evidence
- performance management and teacher observation, in particular photocopying and distribution of records of outcome
- maintaining records of assessment data
- tracking pupil progress
- recently introduced fortnightly senior management team meetings.

New administration in the special school visited included tasks related to:

- lesson planning, taking into account curriculum changes
- the school's Beacon status
- accountability: keeping records and evidence of systems and procedures, in particular for OFSTED
- disability forms: teachers are required to complete disability forms for parents so they can claim grants for their child; it was reported that these forms used to be a one-off, but now have to be completed every one-two years due to a new means-testing system
- medical reports/referrals: it was noted that these forms used to be completed by doctors, but are now the responsibility of the school
- internal systems in the school: the administrator in the special school visited noted that office staff used to do all the photocopying for teachers, but that now teachers do it themselves, using a PIN number system.

## **5.7 The main sources of teachers' administrative tasks**

### **5.7.1 Background**

The literature has revealed a wide range of perceived sources of administration in schools. Historically, changes to the structure of the education system in England and Wales are widely described as having placed high administrative demands on schools. Most frequently mentioned are the introduction of the National Curriculum in 1988

(Hall, 1990; Campbell *et al.*, 1991; Silcock, 1992; School Teachers' Review Body, 1994b; Elam, 1996) and Local Management of Schools in the same year (School Teachers' Review Body, 1994b; Elam, 1996).

In addition to the administrative tasks associated with the initial implementation of the National Curriculum, there are many references made to the ongoing assessment and reporting requirements related to its delivery. The administration of Key Stage and Standardised Assessment Tests and the subsequent collation, analysis and reporting mechanisms are believed to make a significant contribution to the level of administrative tasks carried out by teachers (Coopers & Lybrand, 1998; Better Regulation Task Force, 2000; NUT, 1998).

A research project carried out by PricewaterhouseCoopers for the NUT in 1998 provides the following reason as one contributing to the growth of associate<sup>1</sup> support staff in schools:

*The period since 1988 has seen an unprecedented growth in Government-determined initiatives in schools, bringing with them both administrative and teaching demands but little or no earmarked additional resources. Examples of this include the National Curriculum, SATs, examination league tables, truancy returns, annual parents' meetings, statutory requirements on reporting pupil progress and so on. (p.5).*

More recent research based reports (PricewaterhouseCoopers, 2001a; Hulusi *et al.*, 2000; Better Regulation Task Force, 2000) found that the number and frequency of initiatives introduced in schools were felt to have impacted on teacher and headteacher workloads. Despite this, the studies found teachers to be generally supportive of the principles behind the initiatives. They did, however, have concerns about the way in which the initiatives had been implemented, and would have welcomed additional assistance. The workload study carried out by PricewaterhouseCoopers suggests the development of an 'Implementation Review

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<sup>1</sup> The scope of the NUT research is 'associate staff'. This term is used to describe all staff employed in the school who are not qualified teachers. The NFER report has focused upon those sections of the report with particular relevance to administrative support.

Unit' or IRU, with responsibility for overseeing the changes associated with the introduction of new initiatives in schools.

One example of a government reform resulting in additional administrative work for teachers is the Special Educational Needs Code of Practice, following the 1993 Education Act. Several studies reported that teachers felt the changes to the systems relating to pupils with special educational needs to be responsible for a large increase in paperwork (Elam, 1996; NUT, 1998; Coopers & Lybrand, 1998). This increase in administration associated with changes to the systems in place for pupils with special educational needs was found to be related to both the increased inclusion of such pupils into mainstream schooling, and the more complex procedures for monitoring pupil progress and statementing (as described by Derrington *et al.*, 1996, for example).

Inspections of schools by OFSTED have been frequently mentioned as a source of increased administration for teachers (Brimblecombe *et al.*, 1995; Hulusi *et al.*, 2000; Coopers & Lybrand, 1998; Male, 1999; Centre for the Evaluation of Public Policy and Practice and Helix Consulting Group, 1999; PricewaterhouseCoopers, 2001a). In their report to the School Teachers' Review Body, Hulusi *et al.*, (2000) detailed teachers' belief that the period before an OFSTED inspection was extremely demanding in terms of administration, including tasks such as:

- collating data
- attending pre-OFSTED meetings
- updating policy documents
- producing detailed lesson plans.

Schools now access multiple funding streams, often in relation to discrete programmes through applications for funding (for example study support schemes, inclusion strategies, summer school provision and ICT projects). Several reports have identified the growth in the number of bids made by schools as a contributing factor to an overall increase in administration in schools (Coopers & Lybrand, 1998; Better Regulation Task Force, 2000). In an effort to address this problem, The Standards Fund, the principal source of bid-related funding for schools and LEAs, has outlined

significant changes to the way in which monies are allocated for the period 2001-2002. Guidance produced for LEAs states that paperwork will be reduced by a simplification of the mechanics of both payment and accounting, with almost all allocations made by formula, not bidding (DfEE, 2000).

The internal systems in schools can be a source of administrative tasks, both for teachers and members of the senior management team. School systems implicated in an increase in administration by the literature include: monitoring and evaluation procedures including collation of both routine departmental or pastoral data, and that relating to specific provision (NUT, 1998; Office of Manpower Economics, 2000); and the obligations schools have for parental reporting (Coopers & Lybrand, 1998).

A further source of administration in the school was identified by Coopers & Lybrand (1998), who outlined the contribution made by demands for information from other schools to the overall administrative burden on teachers. This was found to be particularly significant with regard to the transfer of pupil information during the transition from primary to secondary school.

### **5.7.2 Survey findings**

Heads of department/curriculum coordinators and teachers in each type of school were asked to indicate the main sources of administrative tasks. As the tables show, in secondary schools, school initiatives and procedures took precedence over government initiatives whereas in primary schools the reverse was the case. In special schools, heads of department/curriculum coordinators indicated school based initiatives whereas teachers identified government initiatives.

*Secondary schools*

**Table 5.22 Main sources of administrative tasks (Secondary School Heads of Department)**

	<b>%</b>
School initiatives/procedures	91
Government initiatives	86
OFSTED inspections	65
Departmental initiatives/procedures	56
LEA initiatives	46
Working practices	38
Other areas of responsibilities	20
Other	8

(N=122)

*Survey participants were able to give more than one response*

Other areas of responsibilities stated included senior management; subject co-ordination; pastoral role; general teaching role; SEN role; staff management; assessment and monitoring; health and safety; target setting; and ICT technical support. Other sources included extra-curricula activities; exam board requirements; and pupils.

**Table 5.23 Main sources of administrative tasks (Secondary School Teachers)**

	<b>%</b>
School initiatives	85
Government initiatives	76
Working practices	63
A specific responsibility	47
OFSTED inspections	40
LEA initiatives	35
Other	10
None ticked	1

(N=325)

*Survey participants were able to give more than one response*

Specific responsibilities included pupil management; subject co-ordination; staff management role; and careers/vocational role. Other sources included form teacher role and extra-curricular activities.

*Primary schools*

**Table 5.24 Main sources of administrative tasks (Primary School Curriculum Coordinators)**

	<b>%</b>
Government initiatives	93
School initiatives/procedures	83
OFSTED inspections	76
LEA initiatives	73
Working practices	52
Departmental initiatives/procedures	25
Other areas of responsibilities	22
Other	2
<hr/> (N=131) <hr/>	

*Survey participants were able to give more than one response*

Other areas of responsibilities stated included senior management; subject co-ordination; pastoral role; general teaching role; SEN role; staff management; assessment and monitoring; health and safety; and ICT technical support. Other sources included extra-curricula activities.

**Table 5.25 Main sources of administrative tasks (Primary School Teachers)**

	<b>%</b>
Government initiatives	86
School initiatives	85
Working practices	74
LEA initiatives	64
OFSTED inspections	60
A specific responsibility	55
Other	4
None ticked	2
<hr/> (N=223) <hr/>	

*Survey participants were able to give more than one response*

Specific responsibilities included pupil management and subject related role. Other sources included form teacher role; extra-curricular activities; and school governors.

*Special schools*

**Table 5.26 Main sources of administrative tasks (Special School Heads of Department/Curriculum Coordinators)**

	%
School initiatives/procedures	91
Government initiatives	89
OFSTED inspections	64
Working practices	60
Departmental initiatives/procedures	58
LEA initiatives	51
Other areas of responsibilities	27
Other	2
<hr/>	
(N=45)	

*Survey participants were able to give more than one response*

Other areas of responsibility included a senior management role; subject co-ordination role; pastoral/tutor role; SEN co-ordination role; examination officer; assessment and monitoring officer; health and safety inspector; ICT technical support and timetabling role. Other responsibilities included union activities.

**Table 5.27 Main sources of administrative tasks (Special School Teachers)**

	%
Government initiatives	92
School initiatives	84
Working practices	65
A specific responsibility	65
OFSTED inspections	55
LEA initiatives	53
Other	15
None ticked	1
<hr/>	
(N=83)	

*Survey participants were able to give more than one response*

Specific responsibilities included a subject-related role; pupil-related management; staff management/support; beacon/specialist school role and library/resource management. Other areas of responsibility included form teacher/tutor role, extra-curricular responsibilities; an area co-ordination role and home/school links responsibilities.

### **5.7.3 Case study findings**

During the Phase 2 case study visits it became clear that there was a high level of consistency across the three phases in the perceived sources of administrative tasks for teaching staff. For that reason, this section summarises the findings of the visits to secondary, primary and special schools together.

Many sources of administrative tasks for teaching staff outlined during case study visits related to external pressures on the school. These included the following:

- LEA data returns at beginning and end of school year
- new curriculum initiatives from DfEE e.g. literacy strategy at key stage 3, introduction of citizenship education
- Other government initiatives e.g. healthy schools initiative
- teacher performance management
- liaison with external providers e.g. educational psychologists, occupational therapists
- OFSTED
- changes to the national curriculum.

Other sources of administrative tasks were based within the school itself. These included:

- the school's application for Investors in People status
- introduction of vocational courses in the school
- new admin systems within the school
- the school's status as a Beacon school: this was felt to indirectly contribute to the administrative tasks in the school because staff were very conscientious about doing things well.

## **5.8 Key issues/findings**

- Teaching staff in schools carried out a wide range of administrative tasks. Many tasks were carried out on a daily basis, while others were completed less frequently.



- A significant number of administrative tasks were viewed by teaching staff as closely connected to the teaching process itself.
- The role of form tutor (particularly in secondary schools) was associated with a further range of administrative tasks. For primary and special school teaching staff, the majority of whom were both class and form teachers, these administrative tasks were often viewed as a totality with the teaching-related administration they carry out.
- Management responsibilities held by teaching staff (e.g. management responsibility for a department/curriculum area) brought with them a further range of administrative tasks.
- Teaching staff identified a range of administrative tasks that they felt were a core part of their role. These included:
  - administration relating to target setting
  - lesson planning
  - analysis of pupil performance.

There were, however, aspects of these tasks that were isolated as inappropriate to the role of teachers in schools.

- There was also a group of tasks that the majority of teaching staff in schools of all phases felt were inappropriate to their role in the school. These were:
  - Collecting money from pupils
  - Chasing absences
  - Analysing attendance data
  - Photocopying.
- Heads of department/curriculum coordinators felt in general that the administrative tasks associated with this management responsibility were appropriate to the role. These included tasks related to policy making in the department, and line management of departmental colleagues.
- The majority of teaching staff in primary, secondary and special schools reported an increase in the amount of administration they carried out, over the past year.

- New administrative tasks identified by teaching staff included tasks related to the introduction of new examination courses or curriculum initiatives and the introduction of new performance management procedures for teachers. Frequent reference was also made to increasing accountability concerns, and consequent record keeping.
- Teaching staff in primary, secondary and special schools identified four key areas as sources of the administrative tasks they carry out. These were:
  - Government initiatives
  - School initiatives/procedures
  - OFSTED inspections
  - Working practices within the school.



## 6 The delegation of administrative tasks

### 6.1 Administrative tasks being carried out for teaching staff

#### 6.1.1 Background

As referred to earlier, (NUT, 1998) there is great variation between schools as to how administrative support staff are used in schools. Coopers and Lybrand concluded that classroom and subject teachers received little or no clerical support. However, other studies have found some evidence of administrative support staff working with teaching staff. For example, research by the Funding Agency for Schools found that many of the administrative tasks listed by Coopers & Lybrand were being performed by support staff in a large number of the grant maintained schools in their study (Funding Agency for Schools, 1998).

Administrative support staff in schools were found to have supported teaching staff in their administration, through the reallocation of responsibility for certain tasks (Downes *et al.*, 2000; DfEE, 1999a and b; NUT, 1998; Funding Agency for Schools, 1998). Tasks mentioned as having been reallocated in schools include:

- responsibility for the collection of monies from pupils, e.g. for school trips, books etc (DfEE, 1999b)
- personal, day to day, back up to pastoral staff, including taking messages, telephone support, filing (Downes *et al.*, 2000)
- preparing minutes following meetings (Downes *et al.*, 2000)
- reprographic services and other administration related to lesson preparation (DfEE, 1999b).

Support offered by administrative support staff to middle management in the school has been found to include assistance with tasks such as maintaining pupils' records in a particular department/curriculum area, organising resources and providing budgetary information (Mortimore *et al.*, 1992). Administrative support was largely deemed to have benefited middle management through the removal of mundane tasks linked to their area of responsibility, and the provision of time and information necessary to develop a strategic overview (Mortimore *et al.*, 1992).

In addition to the individual tasks that have been passed from teachers to administrative support staff, the literature reviewed refers to the reallocation of specific roles within the school that have been identified as paperwork intensive. The roles mentioned by the literature as having been transferred to administrative staff include:

- running the daily absence rota for teaching cover (Downes *et al.*, 2000; NUT, 1998)
- examination-related administration (NUT, 1998; Downes *et al.*, 2000; DfEE, 1999b)
- pupil record keeping, including admissions and Form 7 (DfEE, 1999b)
- work experience administration (DfEE, 1999b)
- pupil attendance and absence record keeping and monitoring (Funding Agency for Schools, 1998)
- personnel administration for teaching staff (NUT, 1998)
- careers support administration (Funding Agency for Schools, 1998)
- timetabling (NUT, 1998)
- resource management, including photocopying and display (Funding Agency for Schools, 1998).

More recent research carried out by Kerry (2001) identified five ways in which school secretaries/receptionists are involved in the learning of pupils. These are:

- involvement in pupils' learning through the social skills of informal conversation
- involvement in learning through providing the administrative underpinning of lessons and examinations
- dealing with the 'whole child' within difficult social situations
- informal and formal counselling
- supervising a class, albeit on an occasional needs-must basis. (Kerry, 2001).

It is clear that the impact that school administrative staff can have on pupils' learning is not limited to the assistance with which they can provide teaching staff when carrying out administrative tasks. This factor (the second point in the summary provided by Kerry) is, however, the only one with potential to reduce teacher workloads as well as impact on the learning of pupils.

### **6.1.2 Survey findings**

School administrators were asked about those tasks that they carried out for teaching staff, and the frequency with which they did so. The data arising from this question are discussed below. Tables providing full descriptions of the responses can be found in Appendix 6 of this report.

#### *Secondary schools*

The most common types of administration carried out for teaching staff on a daily basis; were:

- photocopying (92 per cent)
- contacting parents (91 per cent)
- preparing material/resources (72 per cent)
- chasing absences (71 per cent)
- collecting money (71 per cent).

Other daily tasks relating to specific responsibilities included financial administration and careers/work experience tasks. With reference to weekly tasks 34 per cent reported analysing attendance data. On a termly basis 49 per cent reported preparing report sets; and 40 per cent reported processing examination marks.

#### *Primary schools*

The most commonly reported daily tasks for primary school administrators were:

- contacting parents (78 per cent)
- collecting money (74 per cent)
- photocopying (57 per cent)
- chasing absences (29 per cent).

Other daily administrative duties relating to specific responsibilities included financial administration. In addition, 30 per cent of primary school administrators reported chasing absences on a weekly basis. With regard to the analysis of attendance data, 29 per cent of primary school administrators reported carrying out this task on a weekly basis; while 33 per cent stated that the task was completed termly.

With regard to the most common tasks undertaken on a termly basis; around a third of administrators in primary schools reported the following:

- processing examination marks
- analysing attendance data
- undertaking work relating to school policy making/target setting
- administrating/clerking examinations/National Curriculum assessments
- preparing for or responding to school inspection.

### *Special schools*

On a daily basis, 81 per cent of special school administrators reported contacting parents; 76 per cent reported collecting money; and 63 per cent did photocopying.

On a termly basis, 45 per cent reported undertaking work relating to the school policy making/target setting; 39 per cent analysed attendance data; and 36 per cent reported undertaking tasks related to school inspection.

### **6.1.3 Case study findings**

A high level of variation in the type and amount of tasks undertaken by administrative staff for teaching staff was found in the case study visits. This variation mirrored that found in the survey data – for example, the secondary schools visited were found to be more likely to have systems in place by which teaching staff could have photocopying carried out than primary or special schools. In fact, in two of the three primary schools visited, teaching staff were responsible for their own photocopying. In the third it was noted that the administrator might be asked, if she had time. In general, then, teachers in primary and special schools appeared to have less administrative support than their colleagues in the secondary phase.

The case study visits to schools revealed a similar range of tasks being undertaken by administrative staff as was outlined in the survey responses. The tasks carried out for teaching staff included general administration such as typing up schemes of work or action plans, the collection of money or permission slips directly from pupils, reprographics and the ordering of general classroom resources. In many schools the office staff had responsibility for preparing all letters to be sent home to parents, as

this was seen as a way of ensuring high quality and consistency in the letters produced. In one special school this contact with parents was extended through a system whereby administrative staff were the first point of contact for parents who wanted to meet with teaching staff. The administrators would liaise with teaching staff and the parents in order to arrange a convenient time for a meeting.

In a number of schools (including examples from all phases) administrative staff supported the work of teachers through the maintenance of data recording systems. This work included inputting attainment figures into data-management systems (e.g. SIMS) and producing reports on pupil progress for analysis by teaching staff as part of target setting or monitoring procedures. This help was particularly valued by the Special Needs Coordinator in one secondary school, who noted that maintaining records of the regular cognitive assessment tests carried out with pupils on the SEN register would otherwise have been very time consuming. In a special school visited, the administrator was currently responsible for inputting pupil attainment data into the SIMS database. However there were plans for a member of the teaching staff to be trained in, and take over this task.

Less frequent tasks that administrators carried out in some schools for teaching staff included the collation of termly or annual pupil performance reports (see example below), and the preparation of registers, timetables and class lists at the beginning of the school year.

In all but one school visited, administrative staff were keen to help teachers with administrative tasks, although the level to which their workload allowed them to do so varied widely. The exception to this was one secondary school visited, where administrative staff felt strongly that the work they undertook was for the school, not for teachers. Even where their work had a direct benefit for teaching staff, such as in the processing of optical mark reader registration sheets, the administrators felt that *'we take information from the teachers, then we work for the school'*. In the same school, administrators felt that when they did carry out administration that would otherwise have been done by teachers, this was for pragmatic reasons only: *'Anything that we remove paperwork-wise from them is a benefit to them. They don't have administrative minds, so we process it for them... I might as well just do it. We take*



*admin away from teachers, but only to save ourselves work in the long run*'. It is clear that in a minority of schools there are issues about the working relationships between teaching and administrative staff that need to be addressed if effective practices are to be established.

This report focuses on the use of administrative support staff in schools. However it is important to note here that other support staff were cited during case study visits as carrying out administrative work for teaching staff. These staff included science or technology technicians, library staff and classroom assistants. One SENCO in a secondary school outlined the following tasks as being carried out by a learning support assistant at the school:

- Writing statements and IEPs
- Putting IEPs on the network
- Liaising with the LEA
- Preparing letters to parents.

## **6.2 Tasks teachers have recently delegated**

Both in the survey of schools, and during case study visits, school teaching staff were asked about those tasks that they had recently delegated to others. This section provides both details of the tasks delegated, and the role of the member of staff who has taken them on.

### **6.2.1 Survey findings**

Heads of department and curriculum coordinators outlined several administrative tasks which they used to carry out that had been delegated to others within the last year. The levels of reported delegation were generally low. The following sections summarise those administrative tasks that teaching staff reported delegating within the past year.

#### *Secondary schools*

Fourteen per cent of heads of department said that they delegated the organisation/administration of SATs/examinations to other teaching colleagues.

Small numbers of secondary school teachers reported that photocopying; filing; monitoring attendance; printing/collating papers; word processing; and collating/preparing resources had all been delegated to administrative support staff. Monitoring attendance data had, in a small number of cases, been delegated to other teaching colleagues. Photocopying had been delegated to technical support staff.

#### *Primary schools*

Twenty per cent of curriculum coordinators highlighted photocopying, which was now being undertaken by either a classroom assistant or administrative officer/assistant. Twenty per cent said that they had not delegated any tasks to other staff within the last year.

Among primary school teachers, a small number stated that photocopying had been delegated to either a classroom assistant or administrative staff. Filing, and collating/preparing resources had in some cases been delegated to a classroom assistant. In addition, sending out letters to parents had been delegated to administrative staff.

#### *Special schools*

For heads of department/curriculum coordinators photocopying was reported as the most common task that had been delegated to classroom assistants. Special school teachers also reported that photocopying had been the main task delegated to classroom assistants.

### **6.2.2 Case study findings**

The above summary of the survey results relating to delegation within the past year show that there are few administrative tasks that teachers of any phase report as having been taken from their workload. During case study visits, it was found that, in general, staff in primary schools had recently delegated more administrative tasks than their colleagues in the secondary and special school sectors. However, the tasks cited as those that had been recently delegated in primary schools were often ones that had been routinely carried out by administrative staff in secondary and special schools for a number of years. It is possible then, that recent initiatives with the aim of increasing the provision of administrative staff in schools have served to bring

primary schools more into line with the level of support that has previously been found in the secondary and special phases. This is not to suggest that secondary and special schools are not in need of increased administrative support, but rather that the baseline for the amount of support received is somewhat higher than in the primary phase. There are still many administrative tasks that teachers in all phases reported that they would wish to delegate (see Section 6.3). In addition, increased provision of administrative support may allow the fine-tuning of roles and responsibilities, with, for instance, delegation between administrative staff, or between administrative and other support roles.

In the two secondary schools visited during the second fieldwork phase of the project, teaching staff did not report a wide range of tasks that had been recently delegated to other staff. In both schools there had recently been ICT systems put in place that had enabled the removal of certain administrative tasks from teachers' workloads (see Chapter 8). In addition, there had been in both schools the introduction of new tasks for administrative staff that might otherwise have been carried out by teachers, but that had not actually taken place previously. An example of such a task is the input of pupil attainment data onto a school-wide information management system. The role of administrative staff in the school was therefore growing, and the benefit of this was felt by teachers, who, continuing the example above, were able to use the information on the system for more effective target setting and lesson planning. However, teaching staff did not report a wide range of administrative tasks being passed from them to administrative staff. Examples of delegation that were provided by teaching staff at the secondary schools visited were as follows:

- keeping inventory of PCs in the school up to date – this was delegated by head of department to new ICT technician
- transferring data from one ICT system to another – data input – head of department had previously had 6<sup>th</sup> form pupils on work experience carrying out this task.

As noted, in the primary schools visited as Phase 2 case studies, there was a wide variation of administrative tasks referred to by teaching staff as those recently delegated to administrative support staff. Across all three schools these included:

- tasks specifically using the advanced ICT skills of the administrator: e.g. word processing policy documents, letters and the school prospectus
- answering the telephone (in a small school)
- word processing the minutes of meetings
- booking staff development courses
- collecting dinner money from pupils.

As mentioned, many, if not all, of these administrative tasks would as a matter of course be carried out by support staff in larger primary schools, or in the secondary or special school phases. This serves to illustrate that there are certain tasks shared by all schools, regardless of the size of the school. It is clear that in very small schools these tasks are more likely to be included in the responsibilities of the core teaching staff.

In the case study special school visited by the NFER team, only one task was described as having been delegated in the last year. It was reported by a teacher at the school that the classroom assistant filled in the evaluation section of objective sheets. The teacher concerned found this help very valuable.

An example of how tasks had been delegated in one case study school is provided below.

*Case study E*

This small primary school was in receipt of the administrative support fund for small schools. The funding received had enabled the recruitment of a full-time administration officer. The school also had a clerical officer, paid out of the school budget. The creation of the new administration officer role had enabled the delegation of the following tasks from teaching staff:

- word processing letters to parents
- collecting dinner money from pupils
- word processing meeting minutes.

In addition, the clerical officer would photocopy school information circulars for teaching staff, although they did their own teaching-related photocopying.

## 6.3 Teachers' use of time released

### 6.3.1 Background

An important question for consideration in discussions of teacher workload, is how teachers use any time released by administrative support. This question was covered both in the survey and case-study phases of this study, and the results are outlined in this section. It is worth noting here that the Teacher Workload Study (PricewaterhouseCoopers 2001a) asked teachers what tasks they would do if more time were available. The four most frequently identified tasks were lesson planning, professional development, one-to-one teaching and preparing/developing resources. These responses to the hypothetical question posed in the PricewaterhouseCoopers work present interesting contrasts with the findings of the NFER research, as this section will illustrate.

### 6.3.2 Survey findings

Heads of department/curriculum coordinators and teachers in all phases were asked to indicate how they used the time which had been released by having delegated tasks to others, as discussed in Section 6.2.

#### *Secondary schools*

**Table 6.1 How time released by support is being used (Secondary School Heads of Department)**

	<b>%</b>
Other administrative tasks	46
Tasks related to specific responsibilities	33
Teaching related tasks	30
Whole school tasks	27
Other	2
Missing	43

*Survey participants were able to give more than one response*

Other ways that time released by support was being spent included pupil management activities.

**Table 6.2 How time released by support is being used (Secondary School Teachers)**

	%
Other administrative tasks	41
Teaching related tasks	36
Task relating to specific responsibility	34
Whole school tasks	21
Other	3
None ticked	44

(N=325)

*Survey participants were able to give more than one response*

‘Other’ included more time for interaction and personal development.

*Primary schools*

**Table 6.3 How time released by support is used (Primary School Curriculum coordinators)**

	%
Teaching related tasks	40
Tasks related to specific responsibilities	30
Other administrative tasks	28
Whole school tasks	25
Other	4
None ticked	50

(N=131)

*Survey participants were able to give more than one response*

Other ways that time released by support was being spent included professional development activities.

**Table 6.4 How time released by support is used (Primary School Teachers)**

	%
Teaching related tasks	40
Other administrative tasks	32
Task relating to specific responsibility	28
Whole school tasks	21
Other	3
None ticked	48

(N=224)

*Survey participants were able to give more than one response*

‘Other’ included family education and personal development.

*Special schools*

**Table 6.5 How time released by support is used (Special School Heads of Department/Curriculum Coordinators)**

	%
Tasks related to specific responsibilities	42
Other administrative tasks	38
Whole school tasks	33
Teaching related tasks	27
Other	9
Missing	42

(N=131)

*Survey participants were able to give more than one response*

‘Other’ included planning and development and parental contact.

**Table 6.6 How time released by support is used (Special School Teachers)**

	%
Teaching related tasks	45
Other administrative tasks	33
Task relating to specific responsibility	33
Whole school tasks	16
Other	1
None ticked	45

(N=83)

*Survey participants were able to give more than one response*

For special school heads of department the most frequent use of time was taken up with tasks related to a specific responsibility, whereas teachers were more likely to use the time for teaching related tasks.

The survey results outlined above reveal the distribution of responses from teachers and heads of department/curriculum coordinators to the question ‘*How do you use the time released by this support?*’. The most frequent response for secondary school teachers and heads of department was ‘Other administrative tasks’, while both primary school teachers and curriculum coordinators most frequently referred to ‘Teaching related tasks’. In special schools, teachers most frequently cited ‘Teaching related tasks’, whereas their colleagues with responsibility for a school department or curriculum area referred to ‘Tasks related to specific responsibilities’. All used the time released from not having to carry out certain administrative tasks, to conduct other administrative tasks to a significant extent. Heads of department used the time

released to carry out whole school tasks more frequently than teachers. The patterns of response to this question are interesting, especially when considered in conjunction with the phase two case study findings.

It is important to recognise that the survey findings outlined above are based on those respondents who had, in the preceding question, documented tasks that they had delegated in the last year. The tables above therefore show that there are, for each group of respondents, a significant number who did not respond to this question in any way. Similarly, as noted in the previous section, many teaching staff interviewed by the NFER team as part of the case study visits did not identify any administrative tasks that had been delegated within the past year. This was particularly true in the secondary and special school phases. Consequently the follow-up question asking about the impact of such delegation was in some cases not asked, and in other cases rephrased as a hypothetical form.

### **6.3.3 Case study findings**

When interviewing staff in the two secondary schools visited, the NFER team found that it was most productive to phrase this question hypothetically as mentioned above, and ask teaching staff that if they were to have time released through the delegation of administrative tasks, how they would use this time. The overwhelming reaction to this question was that the time would not be viewed as ‘additional’ time as such, but would simply help the teachers and heads of department to carry out more effectively the wide range of tasks that their jobs involved. This prediction was supported by one secondary head of department, who noted that he had experienced a recent reduction in time spent on administration, following the delegation of a task. This member of staff noted that *‘the time just got swallowed up by all the other tasks I have to do’*

A head of department in the other secondary school visited emphasised that any time recovered through the delegation of administrative tasks would be used to improve their current lifestyle. The interviewee noted that time released would be used to sleep and talk to family, with the possible long-term consequences of staying in teaching longer and possibly living longer. This head of department felt that the wear and tear of current workloads on teachers’ health was noticeable.



One head of department was keen to note that there was a need, when discussing issues around teacher workloads and delegation, to recognise the core realities of the work carried out in schools. He noted that *'There is common currency of saying that administration gets in the way of teaching. But there is a lack of understanding of the teachers' job – there is not a lot of flexible time. I teach 21 out of 25 lessons. Preparation and marking take a lot of time. These are the core realities of teaching'*. This member of staff therefore felt that the potential of delegation of administrative tasks for reducing teacher workloads was limited, when the core tasks associated with teaching itself and the small amount of non-contact time most teachers experienced were taken into account.

In one small primary school visited, a 'floating' teacher had recently been employed, in order that other teaching staff in the school could have some non-contact time. While this member of staff was not specifically employed to provide either administrative support, or to release time particularly to be spent on administration, the case provided interesting information about what teaching staff did with the additional time released. In this situation, teachers were using their new non-contact time for the following tasks:

- work related to Ofsted action plan
- performance management tasks
- organising resources for lessons
- observations of colleagues and associated paperwork.

In another primary school case study location, teachers commented that the delegation of administrative tasks would mean that they would be able to use lunchtimes for finding resources instead of carrying out administration.

In the special school visited in the second phase of case studies, teaching staff identified several areas of work as those they would spend time on, if they were able to delegate administrative tasks. The first of these was providing pupils with pastoral care. This was mentioned by two teachers at the school visited, and it was noted by one of them that the need for pastoral care for the pupils had increased, but teachers had less time now to provide it. Another area identified by teachers as one on which

they would like to spend more time was ensuring creativity in lessons. Two teachers also pointed out their need to spend more time on social and lifestyle factors, such as family and social life.

## **6.4 Tasks teachers would like to delegate**

### **6.4.1 Background**

Recent research and policy documents have made reference to administrative tasks that are inappropriate to the role of teaching staff, and should be delegated to others (Johnson, 2001; PricewaterhouseCoopers, 2001a). This view was echoed by the Secretary of State for Education (Morris, 2001). Specific tasks appropriate for delegation as detailed in the recent teacher workload study include school trip administration and tasks linked to registration/recording attendance (PricewaterhouseCoopers, 2001a). This section aims to build on this research, by identifying those tasks teaching staff felt could most profitably be transferred to other staff.

### **6.4.2 Survey findings**

Both curriculum coordinators and heads of department were asked which administrative tasks they would like to delegate and which postholder in the school they felt would be better placed to carry them out. Appendix 6.2 provides tables outlining the results of this question in full, however as the frequencies for each particular combination of task and postholder were generally low, the overall patterns are described below.

Primary school curriculum coordinators said they would like to delegate photocopying; and the delegation of collation/preparation of worksheets/resources to an administrative officer. Secondary school heads of department stated that they would like to delegate the following tasks to an administrative officer:

- recording/analysing data
- photocopying
- collating/preparing worksheets/resources.

A small number of secondary school heads of department noted that they would like to delegate the organisation of examinations/national curriculum assessments to another member of the school teaching staff. In special schools, heads of department/curriculum coordinators stated that they would like to delegate the monitoring of attendance, and photocopying to an administrative officer in the school.

Classroom and subject teachers were also asked which tasks they would like to delegate and to whom they would like to delegate these tasks. Filing and photocopying came top of the list for primary, secondary and special school teachers.

Curriculum coordinators, heads of department and teachers from schools of all phases felt that by delegating these tasks to administrative staff they could spend more time on teaching and learning, or generally just have more time to undertake other tasks. Forty per cent of primary curriculum coordinators; 45 per cent of secondary heads of department; and 40 per cent of special school curriculum coordinators felt that by delegating the tasks outlined above they could improve lesson planning and preparation. However, as section 6.4 indicates, there is a wide range of obstacles to effective delegation of administrative tasks in schools.

### **6.4.3 Case study findings**

In contrast to the questions relating to tasks recently delegated and the use of time released by such delegation, when asked about tasks that they would like to delegate teaching staff interviewed gave a wide range of responses. As discussed in the previous chapter, there is a high level of variation in the tasks individual teaching staff view as administrative, and those that they consider to be a key part of their role as a teacher. However, the case study visits revealed certain administrative tasks that were consistently identified as ones that teachers and heads of department/curriculum coordinators would like to delegate. These are outlined in the table below:

Secondary schools	Primary schools	Special schools
Totals and percentages for pupil attendance	Photocopying	Inputting pupil performance data
Collecting money from pupils (e.g. for trips)	Data collation/processing	
Collating pupils' reports		

In addition to the tasks identified above, the SENCO in one of the secondary schools visited cited the following administrative tasks as those for which delegation would be very desirable:

- preparing lists of pupils carrying out interventions
- preparing permission slips for pupils to leave lessons for interventions
- filing
- administration related to pupil IEPs/Annual reviews.

## **6.5 Obstacles to delegation**

### **6.5.1 Background**

In the draft final report of the teacher workload study, PricewaterhouseCoopers identified several obstacles to the provision of effective administrative support. These included issues surrounding the additional cost of administrative support, the importance of clear role demarcation and problems related to space and infrastructure (PricewaterhouseCoopers, 2001a). This section outlines the factors that headteachers, heads of department/curriculum coordinators, teachers and administrators have identified as obstacles to effective delegation.

### **6.5.2 Survey findings**

Teachers and curriculum coordinators/heads of department were asked about those factors that they felt prevented them from delegating administrative tasks to other staff in the school.

*Secondary schools*

**Table 6.7 Factors which prevent secondary school heads of department from delegating tasks to others**

	%
No one to delegate to	62
Not enough time to organise tasks for some one else to do	31
Quicker/more efficient to do it/them myself	30
Tasks not suitable to delegate	23
Only I can do it/them	8
Prefer to do it/them myself	6
Other	20
Missing	8

(N=122)

*Survey participants were able to give more than one response*

Heads of department also cited problems with software; and lack of finance as barriers to delegating tasks.

**Table 6.8 Factors which prevent secondary school teachers from delegating to others**

	%
No one to delegate to	72
Tasks not suitable for delegation	36
Not enough time to organise tasks for someone else to do	35
Quicker/more efficient to do it/them myself	35
Only I can do it/them	19
Prefer to do it/them myself	12
Other	16
None ticked	5

(N=325)

*Survey participants were able to give more than one response*

*Primary schools*

**Table 6.9 Factors which prevent primary school curriculum coordinators from delegating tasks to others**

	%
No one to delegate to	61
Tasks not suitable to delegate	41
Not enough time to organise tasks for some one else to do	34
Quicker/more efficient to do it/them myself	26
Only I can do it/them	16
Prefer to do it/them myself	8
Other	15
None ticked	12

(N=131)

*Survey participants were able to give more than one response*

Other factors listed that prevented curriculum coordinators from delegating tasks included the effects on the other person's workload; other people were reluctant; and some felt it was part of their job description.

**Table 6.10 Factors which prevent primary school teachers from delegating to others**

	%
No-one to delegate to	63
Tasks not suitable for delegation	51
Not enough time to organise tasks for someone else to do	50
Quicker/more efficient to do it myself	37
Only I can do it/them	36
Prefer to do it/them myself	11
Other	12
None ticked	7
(N=224)	

*Survey participants were able to give more than one response*

*Special schools*

**Table 6.11 Factors that prevent special school heads of department/ curriculum coordinators from delegating to others**

	%
No one to delegate to	49
Not enough time to organise tasks for some one else to do	36
Tasks not suitable to delegate	33
Quicker more efficient to do it/them myself	33
Prefer to do it/them myself	11
Only I can do it/them	4
Other	22
Missing	13
(N=45)	

*Survey participants were able to give more than one response*

Other factors listed that prevented curriculum coordinators from delegating tasks included the effects on the other person's workload; other people were reluctant; and some felt it was part of their job description.

**Table 6.12 Factors that prevent teachers from delegating tasks to others (Special School Teachers)**

	%
Tasks not suitable for delegation	58
No one to delegate to	53
Quicker/more efficient to do it/them myself	52
Not enough time to organise tasks for someone else to do	45
Only I can do it/them	43
Prefer to do it/them myself	23
Other	15
None ticked	6
<hr/>	
(N= 83)	

*Survey participants were able to give more than one response*

Other factors that hindered heads of department in delegating tasks included limited administrative support; limitations due to classroom responsibilities; and school specific barriers.

### **6.5.3 Case study findings**

The survey results discussed above reveal that the most frequently mentioned barrier to delegation in schools mentioned was that there was no-one for teaching staff to delegate to. When interviewed as part of case study visits, both teaching and administrative staff alike stated that this was the case, but also cited a wealth of other obstacles to increased delegation in their schools. These will be dealt with here by phase, as although there are some factors mentioned in all schools, there was significant variation between them.

In secondary schools, the more general point about a lack of administrative support staff to delegate tasks to was supplemented by observations made by heads of department. In both Phase 2 case study schools visited, heads of department noted that within their department there were no other teaching staff to whom they could delegate tasks. Reasons given for this included: there being no other teachers in the department prepared to take tasks on; other departmental staff being too busy; other teachers in the department being unsure about the task; and there being a complicated management structure in the department which meant that there were *'lots of chiefs and not many Indians'*.

Another obstacle to delegation mentioned by teaching staff in secondary schools was that of not being used to passing any work onto others. This was frequently manifested as a mistrust that other staff could complete administrative tasks to the high quality that the interviewee felt they provided. As one teacher noted: *'I've been a one-man-band for a long time, and am not used to relying on the competence of others'*. A head of department in the same school would have liked, in theory, to have delegated the input of pupil attainment scores. However, she felt that it would be necessary to check through all the input once it was complete, and that this would take just as long as carrying out the task herself. It was not clear throughout the case study visits whether this frequently held belief was based on first-hand experience of poor quality work by administrative support staff, or was simply an independent way of working that had become entrenched in the profession. It is worth noting however, that all teaching staff were asked whether they were happy with the quality of work provided by administrators in their schools, and the overwhelming majority indicated that they were.

A bursar in one case study secondary school stated that there were tasks that administrative staff could help teachers with, if teachers were prepared to manage the tasks more effectively. This bursar felt that teaching staff did not plan ahead, and that a service such as reprographics could only ever be successful if requests were made in plenty of time. The converse of this argument was articulated by the bursar in the second case study secondary school visited, who stated that *'Teachers are good at what they do because they focus on the immediate needs of students. That then becomes their normal method of operation'*. This point was echoed by a secondary school head of department who noted that there was a certain immediacy of tasks that prevented delegation. This member of staff also stated that the timescale to which teachers worked was different to that of administrative support staff, in that teachers carried out a large proportion of their work before or after the school day, or at home. This was felt to be a significant inhibiting factor for effective delegation.

Several members of staff in secondary schools mentioned that they were reluctant to delegate administrative tasks associated to positions of responsibility they held. As one head of department commented: *'I try to make sure I get the lion's share of admin because I am the head of department'*. However, in the other case study secondary



school, the bursar reported being annoyed that heads of department received significant additional salary for the responsibility, then delegated the work to administrative staff who were paid significantly less. It is clear that it needs to be emphasised to both post-holders and administrative staff that it is the strategic and management responsibilities that lead to the increased remuneration for posts such as head of department, not the administrative tasks associated with them.

In one secondary school visited, members of the teaching staff felt that there were several systems within the school that appeared to be set up to minimise work for administrative staff as opposed to teachers. It was felt that some of these internal systems had resulted in tasks being passed back to teachers from administrative staff. One example given of this was that having carried out the morning attendance register teaching staff were required to write down the names of any pupils absent from class on a separate piece of paper, including details of whether the absence was authorised or unauthorised, and attach the piece of paper to the front of the register before returning it to the school office. This meant that teachers were duplicating the recording of data, but in so doing making the recording of particular aspects of the attendance data less time-consuming for administrative staff.

Two final obstacles to effective delegation identified during case study interviews in secondary schools were firstly delays to work produced by the school office (such as letters home about school trips) and secondly that it was often too difficult to disentangle the administrative element of tasks from the key teaching element. An example of this provided was that inputting performance data to the school information system gave the teacher concerned familiarity with the numbers, and allowed him to see emerging patterns for future analysis.

Case study visits to primary schools revealed a similarly wide range of obstacles to effective delegation. A frequent observation by teaching staff was that administrative staff in the school were too busy to be able to help them. In one small primary school visited, the administrator noted that teachers understood that she was very busy, so tried not to 'bother' her. In the same school, the deputy headteacher described feeling guilty when asking the administrator to carry out tasks such as photocopying, as the administrator had such a heavy workload.

A further point raised during primary school case studies was that teaching staff had had no training in how to delegate. It was also clear that systems for agreeing which tasks should be delegated, and to whom, were individual to each school. One member of teaching staff interviewed reported being unsure about whether certain tasks should be delegated or not. This interviewee felt that it would help future teachers if PGCE courses included elements addressing the delegation of administrative tasks (see Chapter 7 for more training related issues). Similarly, another teacher noted that there was no clear statement in the school about how teachers could use administrative support. This teacher felt that it would be beneficial to have a more formal system of delegation established, so that all staff members knew the procedures in place, and what was expected from which members of staff.

In some cases, as in secondary schools, there was uncertainty among teaching staff about the quality of work carried out by administrative staff, and also about the time needed to explain tasks. One deputy headteacher stated that there was never enough time to explain thoroughly was required, so it was easier for people to carry out the task themselves. A teacher in another school stated that sometimes tasks didn't turn out as anticipated, and that *'you end up doing it again because you don't have time to explain amendments'*. The issue of quality and timeliness of work therefore seemed to be inextricably linked to the amount of time that teaching staff felt that they were able to dedicate to explaining the task.

The possible delegation of the task of photocopying was a key issue in two of the three primary schools visited. In one school, a teacher noted that if it were possible to delegate photocopying it would require teachers to be more organised and efficient about deciding what to photocopy, as opposed to carrying out the task on an *ad-hoc* basis. This echoes the point made in the secondary section above, where administrative staff noted that the immediacy of tasks for teachers often undermined prospects for effective delegation. In the second primary school, the headteacher noted that teachers did their own photocopying because this was easier and more efficient. This headteacher also noted that teachers would be embarrassed to ask office staff to photocopy for them. This view was supplemented by a teacher in the

same school, who noted that she would rather ask the classroom assistant to photocopy documents than request help from the administrator.

Teaching staff in special schools also identified a range of obstacles to the delegation of administrative tasks. As in primary and secondary schools, the practicality of delegation, and the quality of the completed work was an issue. One head of department noted that she would like to delegate the word processing of meeting minutes to a member of the administrative staff in the school. However, it was felt that because the head of department had attended the meeting in question, and taken the notes for the minutes, they would have a better idea of what had happened at the meeting, so would consequently produce better minutes.

A second concern in the special school visited was the difficulty of separating administrative tasks from teaching itself. As one head of department interviewed during a phase one case study visit to his school commented: *'one hundred per cent of teachers' admin tasks are to do with working with children i.e. communicating with other agencies, organising trips and coordinating teaching'*. As has been observed in the primary and secondary phases also, teaching staff were often reluctant to separate administrative tasks that could be delegated from the management and coordination of the project to which that administrative task contributed. Teaching staff were therefore keen to ensure that they retain responsibility for all aspects of tasks that they saw as having an impact on the pupils in their school. This view may be more strongly held by teaching staff in special schools, whose pastoral and medical responsibility for pupils goes beyond that experienced by their mainstream teaching colleagues.

## **6.6 Key issues/findings**

- Administrative support staff in schools regularly carried out a range of administrative tasks for teaching staff.
- There were significant contrasts between schools of different phases in terms of the tasks carried out for teachers by administrative support staff. For example, in all secondary schools visited there was a photocopying service provided by

administrative staff for teaching staff. However, in the majority of primary and special schools teachers were expected to carry out their own photocopying.

- These contrasts illustrate a general pattern whereby teaching staff in secondary schools received a higher level of administrative support than their primary and special school colleagues.
- Teaching staff in all phases reported low levels of recent delegation of administrative tasks. Those tasks that had been delegated tended to be discrete tasks with a purely administrative content (as opposed to smaller tasks that signified one aspect of an overall teaching or management process).
- The majority of teaching staff felt that increased delegation of administrative tasks would enable them to focus on the remaining wide range of tasks that they carried out as part of their role. Teaching staff also felt that such delegation had the potential to reduce their stress levels, and improve the quality of their life outside school.
- Key tasks that teaching staff identified as those they would like to delegate included:
  - photocopying
  - the collation/preparation of worksheets
  - data collection/processing.
- Interviewees during case study visits identified a range of obstacles to the effective delegation of administrative tasks to support staff. Perceptions of teaching staff of such obstacles included:
  - There being no-one to delegate to
  - it would be quicker/easier for me to do it
  - they would do it differently than I would, making my life more difficult
  - I would have no control over what is produced
  - It is part of my role, and I'm not used to delegating.



## 7 Training

### 7.1 Background

As described in earlier chapters, administrative support staff carry out a wide range of roles and are frequently taking on new tasks. Other studies have shown that non-teaching staff in schools come from a variety of backgrounds and have varied skills and experience (see, for example, Kerry, 2001) and they are therefore likely to have a range of training needs. This chapter therefore reports on how the training needs of administrative staff were identified and met and gives some information on teachers' training needs in relation to administrative tasks.

### 7.2 Identification of training needs

#### 7.2.1 Survey findings

Headteachers and administrators were asked to indicate how their training needs were identified. Tables 7.1 to 7.6 show their responses.

#### *Secondary school headteachers*

**Table 7.1 How the training needs of administrative staff are identified**

	%
Through informal discussions	86
As part of induction to the job	77
Through annual review meeting with line manager	68
As they arise	66
As part of whole school needs analysis	59
Other	10
(N=143)	

*Survey participants were able to give more than one response*

#### *Primary School headteachers*

**Table 7.2 How the training needs of administrative staff are identified**

	%
Through informal discussions	83
As they arise	77
As part of whole school needs analysis	67
As part of induction to the job	44
Through annual review meeting with line manager	43
Other	9
(N=208)	

*Survey participants were able to give more than one response*

*Special School headteachers*

**Table 7.3 How the training needs for administrative staff are identified**

	%
Through informal discussions	86
As part of whole school needs analysis	67
As they arise	63
As part of induction to the job	58
Through annual review meeting with line manager	58
Other	9

(N=78)

*Survey participants were able to give more than one response*

According to the headteachers, primary and special schools tended to identify the training needs of their administrative staff in an informal way (as shown in Tables 7.2 and 7.3); whereas secondary schools were more likely to have a more organised system of identification (Table 7.1).

Both primary and secondary headteachers mentioned that the ‘Investors in People’ scheme was also used to identify training needs.

School administrators were also asked to state how their training needs were identified.

*Secondary school administrators*

**Table 7.4 How training needs for administrative staff are identified**

	%
As they arise	80
Through informal discussions	70
As part of induction to the job	58
Through annual review meeting with line manager	52
As part of the whole school needs analysis	48
Other	7

(N=151)

*Survey participants were able to give more than one response*

*Primary school administrators*

**Table 7.5 How training needs for administrative staff are identified**

	%
As they arise	88
Through informal discussions	51
As part of induction to the job	40
As part of the whole school needs analysis	34
Through annual review meeting with line manager	23
Other	9
None ticked	2

(N=183)

*Survey participants were able to give more than one response*

*Special school administrators*

**Table 7.6 How training needs for administrative staff are identified**

	%
As they arise	85
Through informal discussions	66
As part of induction to the job	43
Through annual review meeting with line manager	41
As part of the whole school needs analysis	34
Other	11

(N=80)

*Survey participants were able to give more than one response*

The general view of administrators was that training needs were identified as they arose through informal discussions. However, 77 per cent of secondary headteachers said that the training needs of administrative staff were identified as part of the induction to the job, as did 44 per cent of primary headteachers and 58 per cent of special school headteachers. Also, a high percentage of people reported that training needs were identified through annual review meetings with their line manager, showing that there was a mixture of informal and formal methods employed to identify the training needs of administrative staff. It was reported by some headteachers that it was part of administrative staff job descriptions to take part in professional development activities.

### **7.2.2 Case study findings**

In one of the secondary schools visited, the headteacher mentioned that the identification of training needs had in the past been approached in a fairly informal manner, but he now felt that due to the increased use of ICT at the school, there was a need for more training



in the school. He noted that the needs of the administrative staff were identified through the line management system.

Another method used to identify staff training needs was through self-identification. One primary teacher implemented her own ICT training by enrolling on an evening class course. Through doing this she gained confidence in using ICT for administrative purposes. Despite this being a positive approach to professional development, the teacher concerned stated that she would not enrol again, as it was too exhausting to do in the evenings. Another example of self identification of training needs was in a primary school, where the headteacher stated that she had attended a speed reading course to help her do her work more efficiently. However, there were obviously difficulties with the self identification method, as it usually only applied to those members of staff in higher positions, such as the headteacher and teachers.

#### *Case study A*

The headteacher felt that all the ICT training had gone very well. He noted that the school had gone to a professional provider in a town nearby, who provided '*first rate*' training, although they were quite expensive. Staff went to the training in pairs, combining administrative staff and a member of the SMT.

However, some administrative staff took an active role in identifying their training needs. For example, a member of the administrative staff in the special school asked to be sent on the relevant training course, when the need arose. Also in one of the primary schools, the administrative officer had opportunities to meet the LEA liaison officer to discuss her training needs (see illustration below). The headteacher at that same primary school also encouraged the administrative staff in the school to attend local area support groups for administrative staff.

#### *Case study D*

The Financial Support Officer, from the local LEA, made 9 visits per year to give school administrative manager one-to-one training on FMS6. The Officer recorded any problems that the administrative manager experienced over the course of the year and from this, built a training programme for her, which was delivered in bite-sized pieces. An example of this training included how to produce reports. Following a training

session the administrative manager received a copy of the training manager received a copy of the training material. She preferred this form of training, as it was task oriented and did not overwhelm her with too much information.

### 7.3 Training Opportunities for administrative staff

#### 7.3.1 Survey findings

Headteachers were asked to indicate which of the listed training opportunities were provided for administrative staff at their school during the previous school year, which had taken place or were planned for the current year, and which were needed but not currently provided. The main training priorities within schools tended to be concerned with the use of the school database and the ability to deal with school budgets and other financial matters as shown in Tables 7.7 to 7.9. Administrative staff were asked to indicate those training events that they had attended during 1999-2000, and those that had taken place in 2000-2001. Staff were also asked to indicate which training they felt was needed in the future. The tables below also provide the percentages of administrative staff who did not tick any of these options.

#### *Secondary school headteachers*

**Table 7.7 Main training priorities for Administrative staff**

	1999- 2000	2000- 2001	Needed	None ticked
Using school database	62	74	8	5
Induction into school procedures	59	52	3	22
Dealing with budgets etc.	50	50	5	31
Using spreadsheets	46	45	8	304
Word-processing skills	45	38	4	40
Other ICT skills	41	57	15	19
Participating in whole-school INSET days	39	39	11	41
Generic administrative skills	38	38	6	46
Analysing attendance data	30	38	8	39
Course leading to NVQ/other	17	18	13	62
Analysing performance data	11	22	18	57

(N = 208)

*Survey participants were able to give more than one response*

*Primary school headteachers*

**Table 7.8 Main training priorities for Administrative staff**

	1999- 2000	2000- 2001	Needed	None ticked
Using school database	50	58	4	14
Dealing with budgets etc.	41	43	4	36
Using spreadsheets	33	22	8	44
Word-processing skills	31	17	2	56
Other ICT skills	30	39	12	32
Induction into school procedures	20	21	1	64
Analysing attendance data	18	18	8	59
Generic administrative skills	17	17	4	69
Participating in whole-school INSET days	12	20	4	72
Analysing performance data	7	10	12	74
Course leading to NVQ/other	4	1	7	89

(N = 208)

*Survey participants were able to give more than one response*

*Special school headteachers*

**Table 7.9 Main training priorities for Administrative staff**

	1999- 2000	2000- 2001	Needed	None ticked
Using school database	59	77	8	8
Dealing with budgets etc.	56	72	4	12
Participating in whole-school INSET days	35	39	6	50
Other ICT skills	32	47	14	28
Word-processing skills	30	30	4	54
Using spreadsheets	30	26	10	46
Induction into school procedures	28	27	4	54
Generic administrative skills	22	15	10	62
Analysing attendance data	17	18	14	56
Course leading to NVQ/other	3	8	13	77
Analysing performance data	0	9	17	74

(N = 78)

*Survey participants were able to give more than one response*

In primary and special schools there appeared to have been more training opportunities provided in the year 2000-2001, than 1999-2000. Aspects of training identified as needed for administrative staff related to analysing performance data and ICT skills other than those specified, across all schools. Fourteen per cent of special school headteachers and 13 per cent of secondary headteachers also identified the need for staff to attend courses leading to an NVQ or other qualification.

### **7.3.2 Case study findings**

The majority of training opportunities available to both administrative and teaching staff in the schools visited were ICT related. This was most likely due to the increase in the number of schools taking advantage of the ICT systems now available for the organisation of attendance and pupil progress data.

One headteacher, interviewed in the case studies, had organised new headteachers in her local area into a support group for each other, after noticing that there was no support for new headteachers. Their first meeting had been about time management and learning how to prioritise. A teacher in Case Study F reported that her school had had a series of courses in time management.

#### *Case study D*

The Headteacher stated that she had learnt to prioritise – good time management skills are essential. She has even been on a speed-reading course to help her. She admitted that she could undertake tasks quickly, however often other people's lack of time management skills could hold her up, no matter how effective she was. She felt it was essential to plan ahead to avoid challenges rather than meeting them head on. She believed this was a skill teachers were very good at because they did it all the time in the classroom. She thought they should apply it to their other roles.

## **7.4 ICT Training**

### **7.4.1 Background**

As detailed in the Chapter 8, on the impact of ICT, previous research and recommendations have indicated that ICT should be used for administrative tasks in schools by both teachers and administrative staff. Section 7.3.1 showed that administrative staff had received training in relevant ICT skills or their need in this area had been identified. This section reports the findings on the training received by teachers to carry out administrative tasks.

### **7.4.2 Survey findings**

Teachers were asked to indicate the types of training to use ICT for administrative purposes that they had received over the past year.

*Secondary school teachers*

**Table 7.10 Types of ICT training received**

	<b>%</b>
Using email/internet	36
Word processing	33
Using spreadsheets	30
Accessing/inputting to school Databases	26
Other	28
None ticked	30
<b>(N=325)</b>	

*Survey participants were able to give more than one response*

Forty nine per cent of secondary school teachers stated that they would find training in accessing/inputting to school databases (e.g. SIMS) helpful.

*Primary school teachers*

**Table 7.11 Types of ICT training received**

	<b>%</b>
Using email/internet	57
Word processing	45
Other	37
Using spreadsheets	28
Accessing/inputting to school Databases	18
None ticked	15
<b>(N=242)</b>	

*Survey participants were able to give more than one response*

Forty eight per cent of primary school teachers stated that they would find training in using spreadsheets helpful.

*Special School Teachers*

**Table 7.12 Types of ICT training received**

	<b>%</b>
Using email/internet	59
Word processing	48
Other	27
None ticked	23
Using spreadsheets	21
Accessing/inputting to school Databases	16
<b>(N=83)</b>	

*Survey participants were able to give more than one response*

The majority of the responses from the special school teachers indicated that they felt they needed training in using spreadsheets and accessing and inputting to school databases.

Across all three school types, it was clear that training in using email and the Internet was the most commonly cited kind of ICT training received.

### **7.4.3 Case study findings**

The case study data showed that most schools were participating in ICT training, particularly SIMS and Excel training. Many were also making the most of the opportunity of ICT training funded through the New Opportunities Fund (NOF), but this was mainly related to the use of ICT for teaching rather than administration.

## **7.5 Training in how to delegate**

### **7.5.1 Background**

The NUT (1998) recommended that the Teacher Training Agency should ensure that initial teacher training included the management of associate staff in the classroom (NUT, 1998). The NUT also suggested that associate staff should be treated as valued members of the school staff, referred to by all bodies involved in education through the use of appropriate and inclusive language (NUT, 1998).

Kerry (2001) also argued that in order to achieve a coherent administrative support system, teaching staff need training in how to manage administrative support staff successfully. His research found that, despite playing a key role in the administration, support and maintenance of learning, administrative support staff did not feel valued. School secretaries/receptionists reported that they were not consulted within the school, that their management was often poor and that they had little support and in-service training. Where job descriptions existed, many did not correlate with the actual tasks carried out, and many of the tasks which administrative support staff carried out were not formally recognised.

### **7.5.2 Case study findings**

Training in how to delegate, as raised in Chapter 6, was something which teachers felt would be beneficial to them and which they had not yet received. However, in one

school, teachers had completed a specific course on delegation as part of INSET. One of the teachers interviewed reported that it had been a good '*stop gap*' and '*some good things came out of it*'. They completed the training as a whole school teaching staff.

Teachers at Case Study E felt that the Postgraduate Certificate in Education (PGCE) course should contain elements of delegation, in particular how to delegate, as they felt that this would help future teachers.

### **7.5.3 Key issues/findings**

- The training needs of administrative and teaching staff in administrative skills, on the whole, were identified through informal procedures and as the need arose.
- More formal methods, such as annual review meetings with line managers were also used, particularly in secondary schools.
- Self identification of training needs was more likely to be used by headteachers and teachers than administrative staff.
- The training opportunities that had recently taken place tended to be related to specific skills, many of which were ICT related.
- Teachers felt that training in how to delegate would be very useful, and should be included in the PGCE course as it would be helpful for future teachers.

## 8 The use of ICT for administrative purposes

### 8.1 Background

The possibility of information and communications technology (ICT) reducing the bureaucratic burden on teachers is explored by much of the literature (PricewaterhouseCoopers, 2001a; Coopers & Lybrand, 1998; NUT, 1998; DfEE, 1999a and b; Holland, 1994).

As has been previously discussed, there are certain administrative tasks considered to be an integral part of a teacher's role (see Chapter 5). The *'Bureaucracy Cutting Toolkit'* published by the DfES provides examples from case study research of school ICT systems that have assisted teachers with these core administrative tasks such as the preparation of schemes of work and special educational needs record keeping (DfEE, 1999a). The Coopers & Lybrand research identified other core tasks that ICT systems had potential to assist with including the management of the pastoral system, the preparation of references and reports and the design and preparation of assessment materials (Coopers & Lybrand, 1998). Despite the large number of references in the literature to the possibilities of ICT for assisting teachers with the administrative tasks that are a core part of their role, there is very little relating to the use of such systems by administrative support staff.

For the purposes of this study, teaching staff in schools were asked about the ways in which they used ICT when carrying out administrative tasks. ICT systems discussed during case study visits included personal computers (PCs) and networked computers, electronic registration systems, school information databases and laptop computers.

Headteachers, heads of department/curriculum coordinators, teachers and administrative staff were asked about the use of ICT for administrative purposes, both in the questionnaire survey and during case study visits to schools. The issues raised through the survey and case study interviews focused on the use of ICT for administrative purposes, not specifically on the level of ICT resourcing in the school in which the respondent worked. It should therefore be recognised that the variation in levels of ICT resourcing, across the schools that took part in the survey and case studies, was not measured or factored into the analysis of data.



## **8.2 The impact of ICT on the tasks administrative staff carry out**

### **8.2.1 Case study findings**

The secondary school administrators interviewed were in positions such as bursar and school support manager. In one school, the support manager reported that he felt that changes and/or reductions in administration were likely to be made using ICT. A bursar in another school felt that the Government did not liaise well enough with software houses, using the example of common transfer forms. The feeder schools for this particular secondary school had given their transfer forms to the school on disk. These would not transfer to the schools SIMS system, as some fields in the document had been left empty, and the system did not recognise them. Unfortunately this had led to wasted money on the software system and time completing the forms electronically.

All three primary case study schools reported that they were now receiving more requests from their LEAs for electronic information. The LEA system of sending these requests via email was up and running in one of the primary schools visited, where they reported that the upgrades for the information were requested every couple of months. In case study D, they stated that there had been some difficulties with the email system, but it was working now, and they were waiting to see what impact it would have.

#### *Case study E*

The administrative officer undertook upgrades for the information requested by the LEA every couple of months. The LEA sent her CD ROMS to input pupil data. This took approximately half to one hour, using easy to follow instructions on the screen. She was also able to download the PANDA report directly from the Internet.

Generally, the administrative staff reported that the computerised systems made tasks '*a lot better and quicker*'. One Phase 1 case study primary school administrator felt that the use of a database system to store both pupil records and budgeting information had contributed to a reduction in the time it took to carry out certain administrative tasks. The headteacher in another primary school reported that the use of shared folders by teaching staff had led to streamlined processes for the preparation of IEPs and lesson plans. The

PA to the headteacher in the Phase 2 case study special school noted that the receipt of LEA bulletins by email rather than in the post had enabled the school to keep the information on ICT based systems, thus reducing paperwork in the school office.

Two secondary schools visited as case study destinations had introduced electronic registration systems. In one school the system was based on the completion of optical mark reader (OMR) sheets by teaching staff, and the subsequent processing of these by school administrators. In the other school teaching staff were responsible for inputting the registration data into an electronic notebook, then sending the information to the main school database, using the school network. It was apparent that there had been teething problems with both systems – in the first school administrative staff reported that teachers did not complete the OMR sheets with sufficient accuracy, and in the second, teaching staff noted that problems with the school network made the system extremely time-consuming. It was recognised in both schools, however, that once these problems were resolved the system would be beneficial both in terms of time saved and increased accuracy of attendance data.

It was reported in one primary school that since the introduction of computers at the school, the number of tasks undertaken on a computer had increased, particularly financial tasks such as invoices. The administrator and the headteacher at the school stated that due to the easy access of computerised documents such as schools reports and policies, they were updated more frequently. The burden of the updating of these documents was felt most by the headteacher and the curriculum coordinator, who had to write the updated content.

The special school visited reported that they used their LEA website, which they found very useful and also received the LEA newsletter via email.

## **8.3 Impact of ICT on teachers' administrative tasks**

### **8.3.1 Survey findings**

Various ways in which ICT could be seen to impact upon teachers' administrative workload were explored. The survey data that follow show how teachers and heads of department and curriculum coordinators rated the effectiveness of using ICT to complete administrative tasks.

Heads of department/curriculum coordinators were asked whether, in general, they felt that using ICT made carrying out administrative tasks more efficient/quicker, less efficient/slower or made no difference. The data arising from these questions are outlined in tables 8.1 to 8.6.

*Secondary heads of department*

**Table 8.1 How using ICT affects carrying out administrative tasks**

	%
More efficient/quicker	70
Less efficient/slower	12
No difference	15
Missing	4

(N=122)

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

Heads of department/curriculum coordinators in all phases were asked about their perceptions of the impact that using ICT for administrative tasks had on their teaching, and on pupils' learning. There were low levels of response to this question by secondary school heads of department. A small number reported that the use of ICT made the completion of teaching-related administrative tasks easier and quicker.

*Secondary school teachers*

**Table 8.2 How using ICT affects carrying out administrative tasks**

	%
More efficient/quicker	70
Less efficient/slower	14
No difference	10
Missing	6

(N=325)

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

Teachers in all phases were asked to expand upon the ways in which they felt that ICT had helped them in carrying out ICT tasks. In response to this open question, secondary school teachers stated that ICT had helped them with analysing pupil performance data, the storing of information and carrying out tasks more quickly. When asked about the impact of the use of ICT for administrative tasks on their teaching, secondary school teachers reported that they were able to produce better and more professional looking

worksheets for their pupils. It was also reported that pupils benefited from these improved resources.

Teachers were also asked about the ways in which using ICT had made completing administrative tasks more difficult. Responses to this question were generally low, but secondary school teachers reported that time could sometimes be wasted in trying to resolve problems with ICT systems.

*Primary school curriculum coordinators*

**Table 8.3 How using ICT affects carrying out administrative tasks**

	<b>%</b>
More efficient/quicker	57
No difference	23
Less efficient/slower	12
Missing	8

(N=131)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Primary school curriculum coordinators felt that the use of ICT enabled them to produce more professional worksheets. They also felt that using ICT for administrative tasks made their completion easier and quicker. A small number of curriculum coordinators reported that the use of ICT made it easier to update resources and policies.

*Primary school teachers*

**Table 8.4 How using ICT affects carrying out administrative tasks**

	<b>%</b>
More efficient/quicker	64
Less efficient/slower	13
No difference	15
Missing	9

(N=325)

*Because percentages are rounded to the nearest integer, they may not sum to 100*

Primary school teachers felt that the use of ICT had helped with administrative tasks associated with report writing and the preparation of worksheets and materials. They also noted that they were able to produce more professional looking worksheets for their pupils when using ICT, and that the use of ICT helped with the completion of teaching-related administrative tasks. Difficulties encountered included a lack of teacher expertise

with ICT, limited access to relevant software and time wasted trying to resolve problems with ICT systems.

*Special school Heads of department/curriculum coordinator*

**Table 8.5 How using ICT affects carrying out administrative tasks**

	%
More efficient/quicker	84
Less efficient/slower	11
No difference	4

(N=45)

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

Special school heads of department stated that ICT had helped them to produce better/more professional looking worksheets, and that this had benefited pupils.

*Special school teachers*

**Table 8.6 How using ICT affects carrying out administrative tasks**

	%
More efficient/quicker	66
Less efficient/slower	21
No difference	7
Missing	6

(N=83)

*(Because percentages are rounded to the nearest integer, they may not sum to 100)*

Teachers in special schools felt that the use of ICT for administrative tasks reduced the duplication of tasks, helped with SEN paperwork and IEPs, and aided report writing. As in both secondary and primary schools, special school teachers felt that the use of ICT enabled them to produce more professional looking worksheets for use during lessons. Difficulties reported included a lack of teacher expertise with ICT.

Overall, most teachers and heads of department/curriculum coordinators, felt that ICT made carrying out administrative tasks easier and more efficient. Teachers in special schools were more likely than heads of department/curriculum coordinators to have felt that ICT made carrying out administrative tasks slower and less efficient. Primary school curriculum coordinators were slightly more likely than their counterparts in secondary and special schools to have felt that ICT made no difference to carrying out administrative tasks.

Curriculum coordinators and heads of department were asked about the extent to which they used ICT for administrative tasks. Very few used it for a wide range of tasks. Just under half of all curriculum coordinators often used ICT for preparing material/resources. Just under half of all heads of department used ICT for analysing pupil performance and over half used ICT for developing departmental plans. Teachers gave similar responses.

Primary school teachers reported that ICT had helped particularly with report writing and presentation of resources/teaching materials. However, ICT was felt to be inefficient if the teacher lacked ICT skills. Possible explanations for this are discussed in section 8.3.2, as part of the case study analysis.

### **8.3.2 Case study findings**

Secondary school teachers and heads of department tended to use ICT to a greater extent for administration than their primary counterparts. Secondary school teaching staff noted that, in particular, ICT was useful when carrying out tasks associated with the collation and analysis of pupil performance data. In one school, one teacher commented that *'ICT had helped a lot with admin tasks, for example, keeping information on a database and working out the 'value-added' using performance data'*. Another teacher at the same school reported that, as a head of department, it had made a huge difference having a laptop computer when completing such tasks as pupil performance data, set lists and teacher performance data. These tasks were made easier as this allowed him to work on the same computer at school and at home.

Communication was another area that was identified as having benefited from the use of ICT. One secondary school teacher stated that using ICT for administrative tasks was helpful, and felt that email was particularly useful. However, this teacher also reported that ICT could lead to an increased volume of activity and so did not necessarily result in less work. However, he did think that the use of ICT opened up new opportunities such as being able to save and therefore amend letter pro formas for future use.

#### *Case study A*

The school was planning to do all parental reporting electronically from December 2001. They felt that this would save teachers a lot of time. The current system involved teachers handwriting reports on triple carbonated forms, then collating them as necessary, which was *'incredibly time consuming'*. The new system would operate by providing teachers, on disk, with their set information, with pre-determined fields for teachers to complete with data and text. Teachers would also be given the data. Once teachers had completed the templates it would be an administrative job to collate the reports, and this would be done by administrative staff.

#### *Case Study B*

The Learning Support teacher in this secondary school commented on the fact that her department did not use the pupil data in the same way as other departments. She said *'We don't use data in the same way as other departments – we have to mediate how we talk to pupils about their test results and expected grades. And a lot of what we do is not measurable, it is about social skills'*. She believed that she did not use ICT as much as she should and felt that she would benefit from more ICT training. She also stated that it was not always convenient to use ICT. For example, when she was writing IEP reports with the pupils, she did not like to use ICT to write the reports there and then, but rather to write them out longhand. ICT was not therefore, in this instance making the task of report writing easier or more efficient. She reported that ICT was used by some heads of year to record behavioural incidents. She felt that this was really useful and thought it would be better if all staff did this.

A headteacher from a Phase 1 primary school case study reported that the following was taking place at her school and in the surrounding area:

#### *Case Study 4 (a Phase 1 primary school)*

The headteacher had joined a cluster of small schools in the area. They communicated by email, and planned to hold video conference meetings without anyone going anywhere. She felt that this would save a lot of time.

In the case study schools visited, primary school teachers did not appear to utilise ICT to the same extent as secondary school teachers. However, where they did make use of it,

primary school teachers all reported that ICT had helped to speed tasks up. One teacher commented that ICT helped with planning as lesson plans could be saved and quickly altered rather than being written out again. Another teacher stated that ICT had increased her efficiency as she could now save work onto a disk and take it home to complete.

Several primary school teachers reported having used ICT to produce annual pupil reports, stating that they recognised the benefits of being able to use a databank of general statements that could be used in the reports.

In one primary school visited in Phase 2, a number of disadvantages of the use of ICT for administration were outlined. One teacher noted that ICT had the potential to increase the efficiency with which tasks were completed, but only if the member of staff using the technology already had the skills needed to do so. The headteacher at the same school reported that ICT had created some tasks, such as the school prospectus now being updated more frequently. Also, the installation of the computer suite had created extra administration for staff in the school.

In the Phase 2 case study special school visited staff identified advantages of the use of ICT for administrative purposes. These included the use of email as a substitute for making telephone contact with others. One teacher with additional responsibility for both the school's Beacon status and examination coordination felt that the use of email saved a considerable amount of time. This point of view was echoed by the school's PA to the headteacher. Another teacher in the same school reported using ICT extensively in producing lesson plans.

## **8.4 Access to ICT for administrative tasks**

### **8.4.1 Survey findings**

Heads of department/curriculum coordinators and teachers were asked to indicate whether they had sufficient access to ICT for administrative purposes at school (not in the classroom), in the classroom, and at home. The question asked respondents to indicate in which of these locations they had sufficient access to ICT for administrative purposes. The questionnaire did not provide a definition of the term 'sufficient access'. The responses outlined below are therefore a reflection of the personal perceptions of each respondent as to what constituted 'sufficient access'.



*Secondary school Heads of Department*

**Table 8.7 Sufficient access to ICT for administrative purposes**

	<b>%</b>
At home	76
At school	58
None ticked	12
In the classroom	9

(N=122)

*Survey participants were able to give more than one response*

*Secondary school teachers*

**Table 8.8 Sufficient access to ICT for administrative purposes**

	<b>%</b>
At home	70
At school	64
In the classroom	16
None ticked	14

(N=325)

*Survey participants were able to give more than one response*

*Primary school curriculum coordinators*

**Table 8.9 Sufficient access to ICT for administrative purposes**

	<b>%</b>
At home	78
At school	65
In the classroom	48
None ticked	8

(N=131)

*Survey participants were able to give more than one response*

*Primary school teachers*

**Table 8.10 Sufficient access to ICT for administrative purposes**

	<b>%</b>
At home	74
At school	58
In the classroom	44
None ticked	11

(N=224)

*Survey participants were able to give more than one response*

*Special school Heads of department/curriculum coordinators*

**Table 8.11 Sufficient access to ICT for administrative purposes**

	<b>%</b>
At home	82
At school	78
In the classroom	71
None ticked	4
<b>(N=45)</b>	

*Survey participants were able to give more than one response*

*Special school teachers*

**Table 8.12 Sufficient access to ICT for administrative purposes**

	<b>%</b>
At home	76
At school	64
In the classroom	63
None ticked	11
<b>(N=83)</b>	

*Survey participants were able to give more than one response*

As can be seen in the tables above, teachers and heads of department across all three school types had greater access to ICT in their homes, than at school. Despite the suggestion in Section 8.2.3 that primary school teachers did not appear to use ICT for administration as much as their secondary counterparts, the survey data showed that primary school teachers had about the same amount of access to ICT as secondary school teachers, both at home and at school.

#### **8.4.2 Case study findings**

The secondary school case study data again showed that the majority of secondary school teachers had access to ICT at home. A number of teachers reported that they found it easier and quicker to complete administrative tasks at home, and some attributed this to the fact that the ICT systems at their schools were inadequate. However, the majority of teachers stated that they had sufficient access to ICT in their schools and at home. Several teachers agreed with one teacher in one Phase 2 case study secondary school, who stated that laptop computers were a '*revolution! Wonderful!*'. This teacher particularly valued his laptop when carrying out tasks such as inputting and analysing pupil performance data.

## **8.5 Key issues/findings**

- Administrative staff and teachers reported that computerised systems made carrying out administrative tasks quicker and more efficient.
- The case study findings suggested that secondary school teachers used ICT for administrative tasks more than their primary and special school counterparts.
- The majority of teachers across all three school types indicated that they had sufficient access to ICT at home and a large proportion had sufficient access at school.
- Teaching staff reported having received laptop computers as part of a range of initiatives/schemes in operation. These were highly thought of by those teachers who had benefited.

## **9 Impact of reallocation of administrative tasks**

### **9.1 Impact on headteachers and teachers**

#### **9.1.1 Background**

One of the aims of the NFER research was to identify the impact of recent government initiatives designed to reduce the administrative workload of teachers. It investigated whether the greater use of administrative support staff gave teachers more time to spend on teaching related activities, thereby increasing the support they were able to provide to pupils, and raising achievement.

Previous research studies show that the high workloads experienced by teachers and headteachers are a factor contributing to stress, exhaustion, frustration, disillusionment and a decrease in motivation (Hulusi *et al.*, 2000; Elam, 1996; Campbell *et al.*, 1996; Nash, 2000; Cockburn, 1994; Varlaam *et al.*, 1992, McEwen and Thompson, 1997).

Work overload had been previously identified as the main factor related to teachers leaving the profession in a large-scale study (Smithers, 1990; Smithers and Robinson, 2000). In this way then, the workloads of teachers could have a direct impact on the recruitment and retention problems currently experienced by schools in England and Wales (Spear *et al.*, 2000).

However, the loss of administrative responsibility could represent a removal of what had traditionally been part of teachers' promotion opportunities (Funding Agency for Schools, 1998). This, together with the administrative responsibilities that are considered to be a core part of the work involved with being a teacher emphasises the point that not all administrative activity is necessarily bureaucratic in nature.

#### **9.1.2 Survey findings**

Previous research has focused on the problems associated with a heavy administrative workload. The NFER survey was interested to find out if any attempts to reallocate administrative tasks from teachers to administrative support staff had impacted on this workload. Headteachers were asked what impact, if any, had the reallocation of administrative tasks had on teachers. Results showed that, overall, headteachers were divided on this question. Tables 9.1 to 9.3 illustrate that the most common response from

secondary and special school headteachers was that the reallocation of tasks had resulted in a lighter administrative load for teachers, whereas primary headteachers felt that reallocation had had little or no impact on teachers. The most interesting factor here is the proportion of primary and special school headteachers who did not answer this question. The high non response rate could be because headteachers did not know if or how the reallocation of administrative tasks had impacted on teachers, or that reallocation of tasks from teachers to administrative support staff had not happened in the majority of schools.

*Secondary schools*

**Table 9.1 Impact of reallocation on teachers (Secondary school headteachers)**

	%
Lighter admin workload	46
Very little/none	25
New initiatives/other tasks remove any time gained	17
More able to concentrate on teaching & learning	13
Teachers are less stressed	8
Data/information more readily available	3
Use of ICT has helped	2
Unsure/changes only recently made	2
Clearer definition of job roles	1
Better quality resources produced	1
Other response	7
No response	8
<hr/> (N=143) <hr/>	

*Survey participants were able to give more than one response*

*Primary schools*

**Table 9.2 Impact of reallocation on teachers (Primary school headteachers)**

	%
Very little/none	33
Lighter admin workload	25
More able to concentrate on teaching & learning	17
New initiatives/other tasks remove any time gained	13
Other response	7
Use of ICT has helped	1
Teachers are less stressed	1
Clearer definition of job roles	1
No response	27
<hr/> (N=208) <hr/>	

*Survey participants were able to give more than one response*

*Special schools*

**Table 9.3 Impact of reallocation on teachers (Special school headteachers)**

	<b>%</b>
Lighter admin workload	28
Very little/none	28
New initiatives/other tasks remove any time gained	17
More able to concentrate on teaching & learning	8
Teachers are less stressed	4
Admin support has relieved classroom support to help the teachers	3
Supply of daily documents is readily available	3
Use of ICT has helped	1
Data/information more readily available	1
Other response	13
No response	26
<hr/>	
(N=78)	

*Survey participants were able to give more than one response*

Heads of department and curriculum coordinators were asked what impact, if any, delegating tasks would have on their own teaching. In secondary, primary and special schools the majority reported that delegating would lead to improved lesson planning and preparation. Teachers were asked the same question. For both teachers and heads of department/curriculum coordinators lesson planning and preparation was a key factor in delegation of administrative tasks. Tables 9.4 to 9.6 illustrate teachers' responses.

*Secondary schools*

**Table 9.4 Impact delegation would have on teaching (Secondary school teachers)**

	<b>%</b>
Improved lesson planning	57
Better delivery/more effective delivery	13
Can only improve/an improvement	13
More energy to teach/less exhausted at end of the week	10
Improved differentiation	9
More interesting/up to date materials	8
None/very little	3
Time to share ideas with colleagues	2
Other response	16
No response	10
<hr/>	
(N=325)	

*Survey participants were able to give more than one response*

*Primary schools*

**Table 9.5 Impact delegation would have on teaching (Primary school teachers)**

	%
Improved lesson planning	34
More energy to teach/less exhausted at end of the week	15
Less pressurised/stressed	15
Better delivery/more effective delivery	13
Can only improve/an improvement	12
Improved differentiation	5
More interesting/up to date materials	4
None/very little	4
Time to share ideas with colleagues	1
Personal development/acquiring subject knowledge	0
Other response	7
No response	22
<hr/> (N=224) <hr/>	

*Survey participants were able to give more than one response*

*Special schools*

**Table 9.6 Impact delegation would have on teaching (Special school teachers)**

	%
Improved lesson planning	21
Better delivery/more effective delivery	15
Can only improve/an improvement	15
Less pressurised/stressed	12
More interesting/up to date materials	10
More energy to teach/less exhausted at end of the week	8
Improved differentiation	5
Personal development/acquiring subject knowledge	4
None/very little	4
No response	30
<hr/> (N=83) <hr/>	

*Survey participants were able to give more than one response*

### **9.1.3 Case study findings**

In Phase 2 researchers were interested to find out from headteachers, curriculum coordinators/heads of department and teachers how any additional new administrative tasks impacted on their teaching. Moreover, if reallocating some of these tasks to administrative support staff had had a positive impact on teaching. The research showed that administrative support, for example, enabled headteachers to undertake other administrative tasks associated with headteacher duties. However this support related to whole school tasks rather than administrative tasks associated with teaching. Curriculum coordinators also found administrative support more helpful for duties which related to

this management role rather than their teaching role. However, heads of department felt that non-contact time was more important than administrative support in completing administrative duties.

Overall, evidence from the case studies supports the wealth of previous research findings discussed earlier which states that high workloads contribute to increased levels of stress and low morale in teachers. The majority of teachers reported that they would benefit if some administrative tasks were taken away or reallocated, so that they could improve lesson planning and preparation as indicated in the survey results. At the same time however, they felt that many of the administrative tasks that they carried out were inseparable from their teaching role (see Chapter 6). On the positive side, teachers reported that some administrative tasks which had increased, such as target setting and recording of evidence, had enabled them to focus more on pupil performance but this had resulted in compromises in their teaching strategies in order to cope with the demand of their time.

#### *Secondary schools*

The research team found that some teachers felt more able to delegate than others. This was a key factor in releasing teachers from some administrative duties in order to spend more time on teaching and learning. An example of this can be seen below.

#### *Case study B*

A teacher at the school felt that changes in the school systems, which had led to more administration, had also led to positive impacts. He felt that he had a more hands-on approach to pupil target setting and this gave him a better understanding of what was happening in the rest of the school. The school released him from lessons for half a day to give him time to carry out administrative tasks. He felt that by enabling him to have non-contact time in order to complete administrative tasks the school supported teachers in their role.

The majority of teaching staff interviewed in Phase 2 of the case studies noted that even if they reallocated some administrative tasks to administrative support staff they still spent a lot of time on other administrative tasks.



### *Primary schools*

In Phase 1 and 2 teachers identified how administrative support could help their teaching in a practical way (See Chapter 6). One example of how administrative support had impacted on teaching was discussed in case study D.

#### *Case study D*

A teacher stated that the school secretary undertook the first day absence checking and the monitoring of attendance by ringing the parents of those children missing from class, this enabled her to carry on teaching. Before the school secretary undertook this task she had had to leave the class to ring parents herself.

She also felt that the demand for written evidence and target setting had probably been beneficial as it raised teachers' consciousness of what they put into teaching. Only a teacher could undertake this type of task.

All the primary school teachers interviewed in the case studies felt that some administrative tasks were fundamental to the teaching role. Many teachers saw assessment and recording as part of the core role of teaching. Some teachers in both Phases 1 and 2 were reluctant to reallocate pupil-centred tasks because they helped them to do their job and enabled them to communicate pupil progress with other teaching staff. Curriculum coordinators reported that this management role had led to the greatest increase of administration (Marren and Levacic, 1994). Some teachers felt that if administrative tasks associated with their management role were delegated to other staff this would impact on their promotional opportunities (See Chapter 6).

### *Special schools*

The special school visited had Beacon status and teachers reported that this had indirectly increased the level of administrative tasks. For example, the headteacher reported that '*..that drive for near perfection has led to a lot more paperwork and documentation..*'. In response the Beacon coordinator had reallocated additional administrative tasks associated with Beacon status to administrative support staff.

### *Case study F*

The Beacon Coordinator got secretarial help from the administration officer and librarian for tasks associated with Beacon status, and the administration officer undertook Beacon school financial matters.

## **9.2 Impact on pupil performance**

### **9.2.1 Background**

The relationship between an increase in administrative tasks and pupil performance is not an area in which research has been widely carried out. A search of databases found nothing that focused directly on this issue. The current research will therefore provide a valuable contribution to literature in this area. There are, however, studies that explore the impact of administration on teachers' working patterns, and in doing so mention the impact on teaching and learning strategies used in schools. This section will concentrate on these, providing a context for the subsequent exploration of the impact of administrative support on pupil performance.

Qualitative studies have identified a change in teachers working practices, linked to the increase in the administrative tasks they have to carry out (Campbell *et al.*, 1991; Elam, 1996; Hulusi *et al.*, 2000; Cockburn, 1994). One area on which time pressures have a negative impact is lesson planning and preparation (Elam, 1996; Hulusi *et al.*, 2000).

Another study (Centre for the Evaluation of Public Policy and Practice and Helix Consulting Group, 1999) reported that the paperwork linked to an impending inspection by OFSTED had been described as having a detrimental impact on teaching and learning within schools.

The literature reviewed revealed that there had also been an impact of the heavy workload on the pedagogic techniques employed by teachers. Hulusi *et al.*, (2000) found that teachers had adapted their teaching style in order to alleviate their workload, and that, on reflection, sometimes regretted the changes they had made. Strategies had been introduced such as setting pupils tasks which the pupils themselves would be able to mark. Similarly, Elam noted that teachers were less likely to set homework, use written materials and have out-of-class time contact with pupils (Elam, 1996). Campbell *et al.*,

(1991) reported that teachers felt they had less time to build relationships with the pupils in their classrooms and that the time they spent teaching had become less enjoyable.

An additional consequence of heavy workloads identified, was that of teachers and headteachers losing time for reflection and reading. It was reported that the multiple demands of a heavy workload had led to a more reactive way of working, with little opportunity to identify and pre-empt potential problems or issues. The findings of Elam support this contention, and add that teachers have little time for working towards longer term goals, such as curriculum development (Elam, 1996).

### 9.2.2 Survey findings

The survey asked teachers what impact, if any, delegating would have on pupils learning. Tables 9.7 to 9.9 show that teachers felt that delegating would lead to positive effects on pupils' learning, such as more effective learning and more time to help pupils. A significant percentage of primary and special school teachers did not answer this question.

**Table 9.7 Impact delegation would have on pupils' learning  
(Secondary school teachers)**

	%
An improvement	24
More effective learning	19
More focused work/better differentiation/target setting	18
More interesting lessons/entertaining lessons	14
Improved resources	9
Greater variety of teaching styles	7
None/very little	4
More consistent assessment practices	2
Other response	15
No response	17
<hr/> (N=325) <hr/>	

*Survey participants were able to give more than one response*

**Table 9.8 Impact delegation would have on pupils' learning (Primary school teachers)**

	%
More effective learning	21
An improvement	14
More time to help students	13
More focused work/letter differentiation	11
More interesting/entertaining lessons	9
Improved resources	7
None/very little	5
More enthusiasm	4
More consistent assessment practices	3
Greater variety of teaching styles	2
Other response	4
No response	29

(N=224)

*Survey participants were able to give more than one response*

*Special schools*

**Table 9.9 Impact delegation would have on pupils' learning (Special school teachers)**

	%
More time to help students	13
An improvement	12
Improved/better lesson delivery	11
More effective learning	10
More focused work/better differentiation/target setting	8
Improved resources	7
More enthusiasm	7
More consistent assessment practices	4
None/very little	4
Greater variety of teaching styles	2
Other response	2
No response	33

(N=83)

*Survey participants were able to give more than one response*

The NFER survey asked headteachers how the reallocation of administrative tasks from teachers to administrative support staff had impacted on pupils' learning. Tables 9.10 to 9.12 show that headteachers felt that reallocation of administrative tasks had had very little or no impact on pupils' learning. A significant percentage of primary and special school headteachers did not answer this open-ended question. This low response rate could be because headteachers did not know if or how the reallocation of administrative tasks had impacted on pupils' learning. For those schools where a change in the structure

of administrative systems had occurred it could have been too soon to measure any impact in this area.

*Secondary schools*

**Table 9.10 Impact of reallocation on pupils (Secondary school headteachers)**

	%
Very little/none	34
Better monitoring/support for pupils	13
Systems work more efficiently	8
More direct contact with admin staff	6
Don't know/unsure	6
Improved efficiency when pupil contact office/reception	5
Better home - school contact	5
More teacher time	4
Better quality resources	4
Central collection point for money/reply slips	1
Less stressed teachers	1
Personalised timetables/exam programmes/certificates	1
Other response	16
No response	17

(N=143)

*Survey participants were able to give more than one response*

*Primary schools*

**Table 9.11 Impact of reallocation on pupils (Primary school headteachers)**

	%
Very little/none	30
More teacher time	8
Less stressed teachers	5
Better monitoring/support for pupils	4
More direct contact with admin staff	3
Better quality resources	2
Better home - school contact	1
Central collection point for money/reply slips	1
Improved efficiency when pupil contact office/reception	1
Systems work more efficiently	1
Don't know/unsure	1
Other response	12
No response	41

(N=208)

*Survey participants were able to give more than one response*

*Special schools*

**Table 9.12 Impact of reallocation on pupils (Special school headteachers)**

	%
Very little/none	32
Better monitoring/support for pupils	10
More teacher time	5
Better home - school contact	5
Better quality resources	3
Less stressed teachers	3
Central collection point for money/reply slips	1
More direct contact with admin staff	1
Improved efficiency when pupil contact office/reception	1
Systems work more efficiently	1
Other response	6
No response	40

(N=78)

*Survey participants were able to give more than one response*

Curriculum coordinators and heads of department were also asked if the overall change in the level of administrative tasks had impacted on pupils' learning. A minority said that the effect on pupils' learning had resulted in less effective learning, and the quality of lessons had deteriorated. A significant percentage did not answer this question. Possible reasons are given above.

### **9.2.3 Case studies**

The NFER survey found that headteachers felt that the reallocation of administrative duties had had little impact on pupils' learning. Phase 1 interviews found that if teachers could reallocate some administrative tasks to administrative support staff they would use the time to be better prepared for teaching and to spend with the pupils. One headteacher in particular, explained that the more time teachers spent teaching the better the pupils would perform. Thus in Phase 2, the research team wanted to highlight any examples of where administrative support might have impacted on pupils' learning either directly or indirectly. Teachers were asked how additional new administrative tasks impacted on children's classroom experiences and if the reallocation of administrative tasks from teachers to administrative support staff had impacted on pupil learning.

In general, schools had not formally monitored the impact of reallocation of administrative tasks on pupil performance. Any attempt at this was based on informal

evidence. Most teachers reported that they tried to ensure that pupils did not feel any adverse effects of their heavy administrative workload (see Section 9.1.3).

### **9.3 Performance data**

This element of the research explored the relationship between changes in overall levels of pupil performance and aspects of administrative support within schools, using the statistical technique of multiple regression. School level variables included both past performance (1999) and performance in 2001. Other information available included the overall level of administrative support (as reported by schools as part of the 2001 DfES Annual School Census), and responses from the various questionnaires used in the surveys.

The Annual School Census data gave information on the number of secretaries, bursars and administrators for each school (as full-time equivalents). The total number of administrative staff for each school was multiplied by 100 and divided by the number of pupils attending the school in order to give a measure of administrative support. This measure had a mean of 0.59 for primary schools 0.68 for secondary schools. In other words, the typical primary school of about 250 pupils had about 1.4 FTE equivalent administrative staff. The typical secondary school of about 1,000 pupils had about seven such staff.

Small schools received additional funding for administration. An additional indicator was therefore created to indicate schools receiving this additional support. Small schools were those with fewer than 200 pupils (primary) or 600 pupils (secondary).

Separate analyses were carried out for primary and secondary schools. In each case, the aim of the analysis was to establish if any of a range of measures associated with administration within schools were associated with the aggregate school level achievement in 2001, having taken account of achievement levels in 1999. In other words, the analysis focused on change over time in pupils' achievement, and not on absolute levels of achievement. For primary schools, the pupil performance measures used for each school were the average key stage level achieved in 1999 and for 2001. For secondary schools, the past performance was measured using the percentage of pupils

achieving five or more GCSEs at grade C or better, or equivalent, in 1999. The measure of current performance was the average GCSE point score in 2001.

A number of scores for various aspects of administration were derived from the questionnaires. These included:

- numbers of administrative staff, and changes in these numbers over time
- funding for administrative staff and administrative resources
- time involved in administration
- reasons for delegating or not delegating tasks to non-teaching colleagues
- training needs
- use of the Small Schools Fund (formerly the Administrative Support Fund for Small Schools).

These measures were not, in general, significantly related to improved performance, but there were some exceptions which are noted below. These results should be treated with some caution. Firstly, even where the analysis has shown that there is a significant relationship between an aspect of administration and the change over time in aggregate school performance, this does not prove that there is a causal link. Secondly, for most of the analyses, the available datasets are small, and therefore it has not been possible to take account of a range of other factors which may impact on changes in performance, e.g. the percentage of pupils within a school entitled to free schools, schools' participation in various initiatives such as Excellence in Cities, or Specialist School status.

### **9.3.1 National data**

Data on levels of achievement and administrative support were available for a total of almost 14,000 primary schools. As would be expected, the overall level of achievement in 1999 was a very strong indicator of level of achievement two years later. The ratio of administrative staff to pupils was also significant: schools with relatively high levels of administrative support tended to have slightly **lower** levels of performance in 2001 than would be expected given their performance two years earlier. The effects are highly significant statistically, but very small: this occurs because of the large numbers of schools involved. For example, the difference between a primary school with one administrator per 100 pupils and one with two administrators per hundred was about 0.02 of a level at key stage 2.



There was a similar pattern among the 2,800 secondary schools for which data was available.

### **9.3.2 Headteachers**

Data were available for 153 primary and 123 secondary schools. The relationship between a number of measures related to administration in the school and changes in performance between 1999 and 2001 were investigated. For the primary schools, none of these measures were shown to be related to changes in performance. For the secondary schools, both an increase in the number of administrative staff, and headteachers' perception of increased administrative responsibilities for teachers, were related to higher levels of achievement in 2001 than would be expected given the results for 1999. That is, schools where the overall level of administration seemed to be increasing were the schools making the greatest progress.

### **9.3.3 Teachers**

Information was available for 169 primary teachers from 155 schools. Teachers who reported that the amount of administration which they carried out had increased tended to be those in schools where performance had improved at a greater rate than the average between 1999 and 2001. However, for the 265 secondary teachers (from 167 schools), the reverse was the case: increased levels of administration were associated with lower than expected gains in performance.

### **9.3.4 Curriculum Coordinators and Heads of Department**

Primary coordinators were asked about the extent to which administrative tasks were carried out by themselves, by other teaching colleagues, by administrative staff, and by 'other' staff. Schools which had relatively high levels of progress between 1999 and 2001 were:

- schools in which 'other' staff (i.e. excluding teaching and administrative staff) did not undertake administrative tasks; and
- those in which administrative staff undertook a wide range of administrative tasks.

For secondary Heads of Department (n=99), there were no significant relationships between measures related to administration or size of school and progress.

### 9.3.5 Bursars and administrators

None of the measures related to administration were significantly related to changes in performance between 1999 and 2001.

## 9.4 Impact on administrative staff

### 9.4.1 Survey findings

The NFER survey was also interested in the impact, if any, of an increased administrative workload on administrative support staff. Headteachers were asked about the effects of reallocation of tasks on administrative support staff. Tables 9.13 to 9.15 show that headteachers felt that although such staff gained opportunities to earn more money by working more hours, they too were overburdened.

*Secondary schools*

**Table 9.13 Impact of reallocation on administrative staff (Secondary school headteachers)**

	%
Increased workload/busier/overburdened	34
More staff/increased staff hours	19
Opportunities for development/promotion	12
More interesting job/more varied work	11
Increased stress	11
Improved status of the job	10
Clearly defined roles	8
Improved self esteem	8
Admin staff are more integrated in school community	8
Underpaid for the demands of the job	4
Need to acquire new skills/training	4
Improved efficiency	4
Greater flexibility of operation	4
Very little/none	2
Resentment	2
Don't know/unsure	1
Better communication	1
Other response	1
No response	11
(N=143)	

*Survey participants were able to give more than one response*

*Primary schools*

**Table 9.14 Impact of reallocation on administrative staff**

	<b>%</b>
Increased workload/busier/overburdened	40
More staff/increased staff hours	16
Increased stress	7
Improved status of the job	5
Very little/none	5
Greater flexibility of operation	4
Improved efficiency	4
Need to acquire new skills/training	4
Clearly defined roles	3
Underpaid for the demands of the job	3
Admin staff are more integrated in school community	3
More interesting job/more varied work	1
Opportunities for development/promotion	1
Improved self esteem	1
Better communication	1
Other response	2
No response	29

(N=208)

*Survey participants were able to give more than one response*

*Special schools*

**Table 9.15 Impact of reallocation on administrative staff**

	<b>%</b>
Increased workload/busier/overburdened	31
More staff/increased staff hours	17
Clearly defined roles	13
Improved status of the job	9
Need to acquire new skills/training	9
Greater flexibility of operation	8
Improved self esteem	5
More interesting job/more varied work	4
Opportunities for development/promotion	4
Admin staff are more integrated in school community	4
Procedures have become complicated	3
Very little/none	3
Improved efficiency	1
Underpaid for the demands of the job	1
Other response	4
No response	23

(N=78)

*Survey participants were able to give more than one response*

**9.4.2 Case study findings**

Evidence from the case studies shows that administrative support staff reported an increase in the amount of administrative tasks which they undertook. For some

administrative staff this increase was viewed as an increase in status for their role. For others, it added variety and greater job satisfaction. The majority of administrative support staff interviewed felt they supported the headteacher and teachers in their teaching. In particular, where administrators worked closely with headteachers they felt that they were allowing the latter to spend more time with pupils.

Some administrators reported they could not take on additional administrative tasks for teachers without becoming overburdened themselves. This was particularly the case in small primary schools. Interestingly, some administrators raised concerns, as result of their experience in working with teachers, about the way teachers accessed administrative support and how this might impact upon their workload. An example of this can be seen below in Case Study B.

#### *Secondary schools*

In particular, some administrators reported that it was better for them to take control of some tasks because it would save them time in the longer term. See example below.

#### *Case study B*

The School Accountant with overall responsibility for administrative support staff in the school reported that if administrative staff took responsibility for some tasks, such as data entry, they would have more control over the processes involved. This would save time for both teachers and administrative staff in the longer term.

#### *Primary schools*

In small primary schools, administrative staff reported that the close working relationship between the headteacher and administrative support staff resulted in a lot of goodwill gestures. Both teachers and administrative support staff were aware of each other's heavy workload and tried not to overburden each other with tasks.

#### *Case study D*

The School Secretary was keen to stress that the headteacher took as much pressure off her as possible by undertaking most of the paperwork, and she tried to do the same for the headteacher. She stated that they had a mutual appreciation of one another's role. She

frequently worked overtime. This included staying until 6 pm on Friday and on the afternoons she was not contracted to work. She also worked in the school holidays.

#### *Case study E*

The Administration Officer had only been in post for eight months and reported that she had become busier since first starting the job and was more confident in undertaking tasks as she had become more familiar with the job. She stated that every day was different and presented new challenges. However, she reported that she would not be able to cope if she had to undertake photocopying on behalf of the teachers. She felt that the teachers understood that she was very busy and so tried not to bother her.

#### *Special schools*

In both Phase 1 and 2 some administrators felt that some pupil-centred administrative tasks were best undertaken by teaching staff. An example of this is shown below.

#### *Case study F*

The Office Manager felt that there were some tasks which she undertook which she felt teachers should do (e.g. producing the National Record of Achievement folders). However, she did report that administrative tasks enabled her to have an overview of school procedures and activities, which in turn enabled her to be more effective in the role. The Administrative Assistant reported that she could not recall a day when there was nothing to do. She felt that over the last five or six years there had been a gradual increase in the amount of administration that had to be done.

As schools reorganise administrative support, existing administrative staff will increasingly work longer hours and/or new staff will be employed in full or part time administrative roles. Evidence from the case studies shows that schools are increasingly moving a part time post to a full time position. This may attract different applicants to the post or encourage flexible working practices. However, some administrators reported that they felt underpaid and undervalued (see Chapter 4). The heavy workloads and low pay of administration staff may lead to retention problems. In addition, if more schools employ administrative support staff issues arise regarding office space and equipment. Visits to the schools found that offices that were initially designed to accommodate a

school secretary increasingly had to support a larger administration team. Administrative support staff in both Phases 1 and 2 of the case studies felt that the size of space and equipment available reflected the importance of their position within the school hierarchy.

## **9.5 Key issues/ findings**

Findings from the survey showed that:

- The majority of teachers and heads of department/curriculum coordinators felt that delegation of administrative tasks would help them to improve lesson planning and preparation.
- Teachers felt that delegation would lead to positive effects on pupils' learning, such as more effective learning and more time to help pupils.
- Teachers and heads of department/curriculum coordinators felt that lesson planning and preparation were key factors in the delegation of administrative tasks.
- The majority of secondary and special school headteachers felt that reallocation of administrative tasks had resulted in a lighter administrative load for teachers, whereas primary school headteachers felt that reallocation had had little or no impact on teachers.
- Headteachers felt that reallocation of administrative tasks had had little or no impact on pupil performance.
- Headteachers felt that the reallocation of administrative tasks had increased the workload of administrative support staff.

Findings from the case studies showed that:

- The increase in administrative tasks, such as target setting and providing written evidence, had enabled teachers to focus on pupil performance but this had led to loss of creativity in the classroom.
- Some teachers were reluctant to reallocate pupil-centred tasks.
- Teachers felt that any free time gained from delegation of tasks to administrative support staff was spent on other administrative tasks.
- Administrative support was more effective in helping headteachers with their administrative workload than teaching.
- Administrative staff provided support with managerial duties for curriculum coordinators and heads of department.

- Some teachers felt that the reallocation of administrative tasks associated with management roles might affect their promotional opportunities.
- There were practical constraints on any formal monitoring of the impact of reallocation of administrative tasks on pupil performance.
- For some administrative staff the increase in administrative tasks was viewed as increase in status and had led to greater job satisfaction. However, other administrative support staff felt overburdened .
- Some administrators felt that pupil-centred tasks should be undertaken by teachers.
- Some administrative staff felt underpaid and undervalued.
- Some administrative staff reported that they needed larger offices and more equipment to undertake their role successfully.

Findings from the analysis of performance data showed that:

- The relationship between changes in overall levels of pupil performance and aspects of administrative support within schools, using the statistical technique of multiple regression, found that these measures were not, in general, significantly related to improved performance, but there were some exceptions which are noted below, however, these results should be treated with some caution:
- National data showed that schools with relatively high levels of administrative support tended to have slightly lower levels of performance in 2001 than would be expected given their performance two years earlier.
- Secondary schools where the headteachers reported that the overall level of administration seemed to be increasing were the schools making the greatest progress.
- For the primary schools, none of these measures was shown to be related to changes in performance.
- Primary school teachers, who reported that the amount of administration which they carried out had increased, tended to be in schools where performance had improved at a greater rate than the average between 1999 and 2001. However, for secondary teachers the reverse was the case: increased levels of administration were associated with lower than expected gains in performance.
- For secondary heads of department, there were no significant relationships between measures related to administration or size of school and progress.

# 10 Summary of findings, conclusions and recommendations

## 10.1 Introduction

As the previous chapters show, there is a great range of activity taking place in school in which administrative staff have a key role to play. The survey data showed that some headteachers, heads of department/curriculum coordinators and teachers were still carrying out many administrative tasks whilst others were gradually reducing this. Overall, there was a steady move towards some tasks being reallocated to administrative support staff. On the other hand, teaching staff held a range of views as to which tasks they wished to retain and which they would like to pass on to others.

This chapter summarises and links the findings of the research and makes some recommendations for future practice. The findings will be summarised with reference to the aims and objectives of the research, reiterated below.

The aims of the research were to establish:

- the impact of administrative support in school
- how teachers employ any time released by the presence of extra administrative support
- how the effective use of administrative support, including teacher time released, can best be used to support pupil attainment.

The specific objectives which the research was designed to meet were as follows:

- to establish the full range of roles that additional administrative support staff play in schools
- to establish how administrative staff support teachers in their work
- to identify how teachers utilise the time released by the presence of extra administrative support staff
- to establish how this extra time is best used to support pupil attainment
- to identify the extent of the impact on pupil performance that extra administrative support can have



- to identify effective practice in the use of administrative support staff in schools, including the use of ICT.

## **10.2 Summary of findings**

The summary of findings below presents the evidence which the research has provided to meet the listed objectives.

### **10.2.1 Administrative tasks carried out by teachers**

Most of the research and commentary referred to in this report recommended that administrative tasks should be delegated to administrative staff, thereby freeing up teachers to focus on teaching and learning related activities. It therefore seemed appropriate for the current research to identify the tasks carried out by teachers and from those, the ones which could or should be carried out by others. The findings from the survey and case study data are summarised below.

- Teaching staff in schools carried out a wide range of administrative tasks. Many tasks were carried out on a daily basis, while others were completed less frequently.
- A significant number of administrative tasks were viewed by teaching staff as closely connected to the teaching process itself.
- The role of form tutor (particularly in secondary schools) was associated with a further range of administrative tasks. For primary and special school teaching staff, the majority of whom were both class and form teachers, these administrative tasks were often viewed as a totality with the teaching-related administration they carry out.
- Management responsibilities held by teaching staff (e.g. management responsibility for a department/curriculum area) brought with them a further range of administrative tasks.
- The majority of teaching staff in primary, secondary and special schools reported an increase in the amount of administration they carried out, over the past year.
- New administrative tasks identified by teaching staff included tasks related to the introduction of new examination courses or curriculum initiatives and the introduction of new performance management procedures for teachers. Frequent reference was also made to increasing accountability concerns, and consequent record keeping.
- Teaching staff in primary, secondary and special schools identified four key areas as sources of the administrative tasks they carry out. These were:
  - government initiatives

- school initiatives/procedures
- OFSTED inspections
- working practices within the school.

The summary points below show clearly the tasks which teachers and heads of department/curriculum coordinators thought were appropriate and inappropriate but other tasks may not be so easily identifiable.

- Teaching staff identified a range of administrative tasks that they felt were a core part of their role. These included:
  - administration relating to target setting
  - lesson planning
  - analysis of pupil performance.

There were, however, aspects of these tasks that were isolated as inappropriate to the role of teachers in schools.

- There was also a group of tasks that the majority of teaching staff in schools of all phases felt were inappropriate to their role in the school. These were:
  - collecting money from pupils
  - chasing absences
  - analysing attendance data
  - photocopying.
- Heads of department/curriculum coordinators felt in general that the administrative tasks associated with this management responsibility were appropriate to the role. These included tasks related to policy making in the department, and line management of departmental colleagues.

### **10.2.2 Support provided by administrative staff to teachers**

Across the survey schools, data were collected on the tasks delegated by teaching staff to others. Most of these are listed in Section 10.2.3 which describes the tasks carried out by administrative support staff. However, the case studies illustrated that many teachers were unable to transfer tasks to others or were reluctant to do so. The reasons offered for this related to the following issues:

- some tasks were an integral part of teaching (e.g. preparing content of lesson plans)
- some tasks, thought administrative on the surface, were appropriate as they had impacted on their teaching (e.g. target setting and analysis of performance data).

More negative reasons were related to:

- no/insufficient administrative support available
- administrative support provided mainly to headteachers and senior managers or, at least, perceived as being so
- planning and time factors
- tasks not suitable for delegation
- reluctance to delegate because of embarrassment.

Other issues were related to more individual concerns, such as:

- the link between promoted posts and their concomitant administrative responsibilities
- teaching staff seeing such tasks as part of their role and not wishing to relinquish them
- worries about a loss of control over what was produced.

The data collected showed that teachers did not always feel prepared for, or comfortable with, the notion of delegating to administrative staff. School procedures were not always clear to all staff and teaching staff often felt unsure about the extent to which they were able to use administrative staff as a resource.

Much of the discussion in recent years has suggested that teachers should transfer all administrative tasks to others but this does not take account of the integrated nature of many of the tasks carried out by teachers. Joint working also requires advance planning and the availability of both teaching and support staff to discuss tasks and implement them within the desired timescales and in many schools this level of coordination did not seem to be in place. Headteachers were much more able to access support than other teaching staff, partly because of the structures in place and perhaps because of their physical proximity to office staff locations.

### **10.2.3 Roles of administrative staff**

In order to examine the ways in which administrative staff could provide support to teachers, the research investigated the numbers of staff involved in schools, the kinds of posts being held and the activities they carried out.

The survey data showed that, on average, secondary schools had four full time equivalent (FTE) staff, whilst primary and special schools had one FTE. The larger the school, the more likely it was to have more administrative staff.

As the number of staff has increased, so has the range of titles held and tasks carried out. Bursars and personal assistants are no longer the preserve of independent or grant maintained schools but are found across all types of school. In the survey, the job titles identified by headteachers across the three phases were:

- administrative/clerical assistant
- headteacher's personal assistant/secretary
- bursar/registrar
- finance officer/financial clerk
- secretary
- office manager/head of administration
- receptionist/telephonist.

The main tasks carried out by administrative staff on a daily basis are listed below:

- photocopying
- contacting parents
- preparing materials and resources
- chasing absences
- collecting money

Weekly and termly tasks included:

- analysing attendance data
- preparing report sets
- processing examination results/administrating National Curriculum assessments
- undertaking work related to school policy making/target setting
- undertaking tasks related to school inspection.

These kinds of tasks match closely with those identified by other research and also with the tasks indicated by teachers as those which they had delegated or would like to delegate.

#### **10.2.4 How teachers use time released**

The survey data showed that, overall, teaching staff would use any time released by delegating administrative tasks to other staff to carry out other administrative tasks and teaching related tasks. Interesting differences between phases were noted:

##### *Secondary schools*

- 46 per cent of heads of department and 41 per cent of teachers would use any time released for other administrative tasks
- 30 per cent of heads of department and 36 per cent of teachers would use time for teaching related tasks

##### *Primary schools*

- 40 per cent of curriculum coordinators and 40 per cent of teachers would use any time released for teaching related tasks
- 28 per cent of coordinators and 32 per cent of teachers would use time for other administrative tasks

##### *Special schools*

- 38 per cent of heads of department/curriculum coordinators and 33 per cent of teachers would use any time released for other administrative tasks
- 27 per cent of heads of department/curriculum coordinators and 45 per cent of teachers would use time for teaching related tasks.

In each phase, the heads of department/curriculum coordinators would also use time for tasks associated with their specific responsibilities.

In the case studies, many teachers felt that they had not gained any significant time as they had not been able to delegate many tasks. Generally, interviewees thought that any time saved would be taken up by other tasks and was not therefore very noticeable. Several teachers in the case studies referred to the need for (increased) non-contact time in order to carry out administrative tasks. Some of those who responded to the hypothetical question said that they would use any saved time to improve their work-life balance.

### **10.2.5 Impact on pupil performance of extra administrative support**

In both the survey and the case studies participants were asked about the impact of extra administrative support on themselves and on others, including pupils. Headteachers felt that the *impact on teachers* had been or would be:

- very little or none
- a lighter administrative load

Teachers felt that the impact on themselves had been or would be:

- improved lesson planning

The *impact on pupils' learning* identified by teachers was:

- improved pupil learning
- more effective learning

Headteachers were also asked about the impact on pupils of reallocating tasks from teachers to administrative staff. A third reported that it would make little or no difference while a small proportion thought that it would lead to better monitoring and support for pupils.

In addition, headteachers were asked about the impact on administrative staff of the reallocation of tasks. Their responses mainly indicated that:

- administrative staff would have an increased workload and be busier, possibly overburdened
- schools would need to take on more staff or increase the numbers of hours worked.

### **10.2.6 The use of ICT for administrative purposes**

Both teaching staff and administrative staff were increasingly using ICT for administrative tasks and found that it made their work more efficient and quicker, as long as they had had the necessary training to use the software. Some instances were found of incompatible systems between the LEA and schools or between primary and secondary schools, but these were being attended to.

Teachers found the use of laptops particularly helpful as they could use the same machine both at school and at home. More generally, teachers were asked about their access to

computers for administrative purposes. The data showed that access was generally better at home than at school: around three-quarters of teachers and heads of department/curriculum coordinators had home access compared with around two-thirds having access at school.

### **10.3 Recommendations for future practice**

The recommendations listed below are derived from the findings of the research.

- Schools should issue guidelines to all staff on the types of administrative tasks that can be delegated by teaching staff, and the staff to whom they can be passed. In large secondary schools it may be beneficial to appoint a member of the administrative staff to be responsible for the delegated tasks for each department.
- Such guidelines should include indicative time-scales for the completion of tasks by administrative staff. These time-scales should reflect both the needs of administrative staff to plan their work, and the possibility that teaching staff may require other tasks to be completed at short notice.
- School should carry out some analysis of the tasks currently carried out by teaching and administrative staff and try to identify those which could be transferred from teachers to administrative staff, to the benefit of both.
- Termly or annual administrative tasks that are carried out throughout the school (e.g. timetabling, preparing examination/assessment entry forms, pupil reporting) should, as far as possible, be carried out centrally by administrative support staff. If this is not possible, it would be beneficial to establish school-wide systems for the tasks that are followed by all staff, to ensure that processes are as efficient as possible, and that the outcomes are of consistent quality and presentation
- Non-teaching related administration (e.g. collection of money from pupils, chasing absences, analysing attendance data and photocopying) should be carried out by administrative support staff.
- Efforts should be made to reduce the amount of inappropriate administration being carried out by teaching staff, including administration related to teaching and learning activities such as the preparation of lesson plans and resources. Where possible, tasks should be divided, such that a member of the administrative staff in the school takes over administrative aspects of tasks, while the member of teaching staff retains the teaching and learning overview.

- Where it is impossible to disentangle administrative tasks from the teaching and learning activity to which they are related, teaching staff should be supported in terms of non-contact time and ICT systems to reduce the time spent on the administrative aspect of the task.
- All school staff should be encouraged to view administrative tasks linked to management responsibility (e.g. for a department or curriculum area) as distinct from the strategic and policy responsibility that the post entails. This would enable heads of department/curriculum coordinators to feel happier delegating administrative tasks linked to their area of responsibility, and administrative staff to be more accepting of this delegation.
- For some tasks, schools might like to consider whether it would be more appropriate to (re)allocate tasks to administrative staff or to provide teachers with more non-contact time.
- The perceived impact on pupil performance is so far not significant but schools might wish to look more systematically at the effects on teaching and learning of any reduction in teacher administration.

The research has shown that administrative tasks have increased in recent years but so have the numbers of non-teaching staff available to provide support to teaching staff in this area. As suggested above, guidelines are needed so that all members of the school staff are fully aware of the level of support available and how it has been allocated. This would enable teaching staff to feel more comfortable about accessing the support as a normal part of their work and would encourage administrative staff to work flexibly with teachers to help meet their needs. If the level of support and its availability were to increase, teachers would be more likely to look at ways of reorganising their own tasks so as to make more effective use of the support, and they would begin to recognise the valuable role that can be played by administrative staff if the conditions are right. Such a change could have longer term implications for the roles of teachers and administrative staff, respectively, and could lead to a wider cultural change, whereby a range of professionals work together in schools to support pupils' learning.





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# Appendix 1 Information on survey and case study schools

## A1.1 Phase 1 case study schools

Case studies were carried out in eight schools covering a range of geographical location and type. There were three secondary schools (two with fewer than 600 pupils), three primary schools (two with fewer than 200 pupils) and two special schools (one with fewer than 75 pupils). Table A1.1 shows the characteristics of the schools.

**Table A.1.1 Case study schools**

School	1	2	3	4	5	6	7	8
<b>LEA Type</b>								
London				x				
Metropolitan		x						x
New	x							
County			x		x	x	x	
<b>SCHOOL INFORMATION</b>								
<b>Geographical location</b>								
Urban		x	x				x	
Suburban				x				x
Rural	x				x	x		
Central		x					x	
North								x
South	x			x				
East	x		x		x	x		
West								x
<b>School type</b>								
Secondary	x	x	x					
Primary				x	x	x		x
Special							x	x
Community	x				x	x		x
Foundation			x					
VA				x				
Beacon		x						
High achieving	x	x		x		x		
Low achieving			x		x	x	–	–
Ethnic background	low	high		low			–	–
Free meals		high		low			–	high
SEN		above average		average	high	average	EBD	MLD
<b>School size</b>								
Large		x		x				x
Small	x		x		x	x	x	

## Staff interviewed

In total, 31 school staff were interviewed about administrative support in their school, as Table A1.2 shows.

**Table A1.2 Staff interviewed**

<b>Interview with</b>	<b>Number of contributors</b>
Headteacher	8
Head of department/subject coordinator	7
Classroom or subject teacher	6
Administrative staff	9
Learning support staff	1
<b>Total</b>	<b>31</b>

There was a range of administrative arrangements in the schools visited. The administrative staff in post in one large secondary school included a finance officer/bursar and a team of seven full time members of the administrative team. In a small secondary school there were five full time administrators, one of whom had a dual role to include being the office manager and secretary to the headteacher. In primary and special schools there was only one administrator, with one school having a few hours additional support funded by the Administrative Support for Small Schools Fund.

### **A.1.2 Summary of themes arising in Phase 1 case studies**

#### **Summary of interim report**

This report has outlined the main themes emerging from case study visits to eight schools in England. The three secondary, three primary and two special schools taking part in the research represented a range of geographical locations and type. In each school interviews were conducted with a range of staff, including headteachers, heads of department/curriculum coordinators, teaching staff and administrative support staff.

The administration carried out in schools has been related to four main areas: firstly, the management of the school, including financial management and school policy and procedures; secondly, the management of pupils, including induction, transition, attendance and absence; third, the curriculum, encompassing curriculum support and assessment; and finally routine administration such as communication and day to day tasks.

When asked about the extent to which they perceived there to have been a change in levels of administration, the vast majority of interviewees felt that over the last four to five years there had been an increase. They did not, however, believe that there had been a significant change over the previous year. There were a wide range of reasons given for the overall increase in administration, including mention of sources external to the school, such as government and LEA initiatives and OFSTED inspections, and sources within the school itself, such as changes in school procedures and the focus of the senior management team.

Different schools had different ways of allocating tasks to the various members of their staff. Tasks that would in some schools be considered a core part of a teachers' role were in others carried out by administrative staff. The majority of teachers interviewed stated that the administrative support that they received did not release any additional time for them. Those teachers who did have additional time available to them described using it to complete tasks such as administration related to monitoring student teachers, planning lessons and spending more time with pupils and staff.

The main challenges teaching staff experienced when managing administrative support in schools related to time pressures, insufficient administrative support, inefficient systems in place, problems with delegation and the prioritisation of work for senior staff.

Very few of the schools visited had formal systems in place for monitoring either the time released by administrative support, or any resultant impact on pupil performance. Despite this, many staff expressed their view that an increase in administrative support would have a positive impact both on teachers' enjoyment of their job, and pupil performance. However, a number of teaching staff noted that they did not want to delegate their administrative tasks to other staff, and administrative staff affirmed their role as providing support to teachers, not as direct input into the education process itself.

Case study interviewees were asked to describe aspects of administrative practice in their school that they believed to be working particularly well. Examples provided included those concerned with the reallocation of tasks to administrative staff, the creation of systems for carrying out tasks efficiently, the financial management of the school, and the sharing of resources and information. Staff also mentioned that good relationships



between management, teaching and administrative staff in the school had led to more effective practice.

The majority of staff interviewed felt that while ICT had clear potential for reducing the administrative workload in schools, there were certain constraints currently preventing this potential from being fulfilled. These included resourcing issues, training needs, and an actual increase in work resulting from more efficient working practices. Interviewees reported that ICT was currently being used to collate, store and share information in databases, record attendance, and enable financial/budget systems. In some cases teachers had been provided with electronic notebooks, laptop computers and voicemail systems. Communication via email was considered to be extremely valuable in large schools.

The above points represent a summary of the findings from the initial case studies of the research project. The other elements of the project (questionnaire, analysis of performance data, literature review and second case studies) will further inform the discussion of these issues.

## **Interim report to DfES, May 2001**

### **A1.3 Questionnaire survey sample**

- |           |   |
|-----------|---|
| Primary   | A sample of 600 maintained schools comprising of Infants, First, Primary, First and Middle and Junior schools. Independent and Special schools were excluded from the sample. The sample was weighted according to size of school, and included 347 'large' schools with more than 200 pupils, and 253 'small' schools with less than 201 pupils.   |
| Secondary | A sample of 600 maintained schools comprising of Secondary Modern, Grammar, Comprehensive to 16 and Comprehensive to 18 schools. Independent and Special schools, and 6th Form colleges, were excluded. The sample was weighted according to size of school, and included 401 'large' schools with more than 700 pupils, 129 'small' schools with less than 601 pupils, and 70 'medium-sized' schools with pupil numbers ranging between 601 and 700. |
| Special   | A sample of 200 special schools, with Independent schools excluded. The sample was weighted according to size of school, and included 99 'large' schools with more than 75 pupils, and 101 'small' schools with less than 76 pupils.  |

Project case study schools were also excluded from all of the above samples.

### Questionnaires sent

The number of subject/class teacher questionnaires sent to each school varied depending on the size of the school concerned. In the primary sample, each school was sent at least one questionnaire for completion by a teacher. A second teacher questionnaire was sent to any school with 51 or more pupils. In the secondary sample, each school was sent at least two questionnaires for completion by teachers. A third questionnaire was sent to any school with 601 or more pupils. In the special school sample, each school was sent at least one questionnaire for completion by a teacher. A second teacher questionnaire was sent to any school with 26 or more pupils.

**Table A1.3 Response by Schools**

Sample	Prim	Sec	Spec	TOTAL
<b>Schools returning at least one completed questionnaire</b>	<b>267</b>	<b>220</b>	<b>95</b>	<b>582</b>
Schools not responding	298	298	87	683
Schools withdrawing from participation (see Reasons for Refusal)	24	63	15	102
<b>Schools sent questionnaires</b>	<b>589</b>	<b>581</b>	<b>197</b>	<b>1367</b>
Schools withdrawn from sample by LEA	11	19	3	33
<b>Schools drawn in sample</b>	<b>600</b>	<b>600</b>	<b>200</b>	<b>1400</b>

**Table A1.4 Reasons for Refusal**

Reason for Refusal	Primary	Secondary	Special	TOTAL
Staff shortage/illness/changes	1	5	1	7
Inspection	3	2		5
No time/pressure of work	15	41	10	66
School re-organising/closing	1	2	3	6
Union objections	2	1		3
No reason given	2	12	1	15
<b>TOTAL</b>	<b>24</b>	<b>63</b>	<b>15</b>	<b>102</b>

#### A1.4 Phase 2 case studies

Case studies were carried out in six schools covering a range of geographical location and type. There were two secondary schools, three primary schools (two with fewer than 200 pupils) and one special schools (one with fewer than 75 pupils). Table A1.5 shows the characteristics of the schools.

**Table A.1.5 Case study schools**

School	A	B	C	D	E	F		
<b>LEA Type</b>								
London								
Metropolitan					x			
New		x	x	x				
County	x					x		
<b>SCHOOL INFORMATION</b>								
<b>Geographical location</b>								
Urban			x		x			
Suburban						x		
Rural		x		x				
Central		x						
North				x	x			
South						x		
East								
West								
<b>School type</b>								
Secondary	x	x						
Primary			x	x	x			
Special						x		
Community			x			x		
Foundation		x						
VA								
Beacon						x		
<b>School size</b>								
Large	x	x	x					
Small				x	x	x		

#### Staff interviewed

In total, 27 school staff were interviewed about administrative support in their school, as Table A1.2 shows.

**Table A1.6 Staff interviewed**

<b>Interview with</b>	<b>Number of contributors</b>
Headteacher	6
Head of department/subject coordinator	9
Classroom or subject teacher	5
Administrative staff	7
Learning support staff	0
<b>Total</b>	<b>27</b>

There was a range of administrative arrangements in the schools visited. The administrative staff in post in one large secondary school included an accountant, bursar, examinations officer, secretary to the headteacher, secretary for curriculum support, receptionist and two members of the reprographics team. In another secondary school there were five administrative staff one of whom was an administrative assistant in the 6<sup>th</sup> form. In one small primary school there was only one school secretary who had a few hours additional support funded by the Administrative Support for Small Schools Fund. Both the other two primary schools employed two administrative staff. In one of these schools the office manager undertook the role of personal assistant (PA) to the headteacher. In the special school there were four administrative staff one of whom was the PA to the headteacher.



## Appendix 2 Analysis of job descriptions for administrative staff

### Job descriptions for secondary school administrators

ROLES AND RESPONSIBILITIES	JOB TITLES			
	BURSAR (n= 23)	SCHOOL ADMINISTRATIVE OFFICER (n= 16)	FINANCE MANAGER (n= 24)	HEADTEACHER'S PA (n= 5)
<b>General Administration</b>	23	16	24	5
<b>Finance</b>	23	16	24	
<b>Personnel</b>	18	11	18	1
<b>Member of SMT</b>	4	1		
<b>Property/site manager/assistant</b>	19	4	6	
<b>ICT/technical manager/responsibilities</b>	7	3	3	
<b>Exam officer</b>	1			
<b>Clerk to governors</b>	3	4	5	1
<b>Marketing</b>	3	1	1	1
<b>Student records</b>	1	1	1	1
<b>Supervise administrative/clerical staff</b>	8	8	1	3
<b>Headteacher's PA</b>	3	3		5

## Job descriptions for primary school administrators

ROLES AND RESPONSIBILITIES	JOB TITLES		
	BURSAR (n= 11)	ADMINISTRATIVE OFFICER (n= 27)	SCHOOL ADMINISTRATOR (n= 30)
General administration	11	27	30
Finance	11	27	21
Personnel	11	22	7
Member of SMT			
Property/site manager/assistant	2	5	3
ICT/technical manager/assistant		5	
Exam officer			
Clerk to the governors	2	5	2
Marketing			
Student records	2	18	15
Supervise administrative/clerical staff	11		
Headteacher's PA		5	6

## Job descriptions for special school administrators

ROLES AND RESPONSIBILITIES	JOB TITLES	
	BURSAR (n= 10)	SCHOOL ADMINISTRATOR (n= 25)
General Administration	9	25
Finance	10	23
Personnel	8	20
Member of SMT		1
Property/site management/assistant	3	3
ICT/technical manager/responsibilities		4
Exam officer		
Clerk to Governors	1	
Marketing		
Student records	2	8
Supervise administrative/clerical staff	1	3
Headteacher's PA		2





## **Appendix 3 Examples of job descriptions for administrative staff**

### **3.1 Job Description – Secondary School**

**Job Title:** Accountant and Systems Manager

**Team Leader:** Headteacher

#### **Duties and Responsibilities**

The School's expectations of a high achieving member of staff with this responsibility are that they will:

- operate, maintain and develop the administrative and financial procedures and systems of the school in co-operation with the Leadership Group and Governors, ensuring that all legal requirements with regard to personnel are fully met.
- advise the Leadership Group on all non-teaching matters so as to contribute to the successful and effective operation of the school.

#### **General**

- function as a member of the Leadership group, ensuring that decision-making is part of a shared process. As such members of the Leadership Group have a collective responsibility for the management of the school.

#### **Financial**

- advise the Governors on investment and financial policy, preparing appraisals for particular projects and for the development of a business plan (long term financial strategy) for the future development of the school.
- prepare for approval by the Governors the annual estimates of income and expenditure. Obtain agreement of budgets, and monitor accounts against budgets. Prepare regular management accounts for budget holders and report on the financial state of the school to the Governors.
- be responsible for the school accounting function, ensuring its efficient operation according to agreed procedures, and maintain those procedures by conducting at least an annual review.
- monitor all accounting procedures and resolve any problems, including:
  - The ordering, processing and payment for all goods and services provided to the school;
  - The operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month;
  - Maintaining an assets register;
  - Preparation of invoices and collection of fees and other dues, taking legal action where necessary to recover bad debts;
- prepare the final accounts and liaise with the auditors. Provide detailed management accounts for the Governors and Head according to an agreed schedule, reporting immediately any exceptional problems.
- provide a comprehensive payroll service for all school staff, with operation of the various pension schemes and other deductions in which the school participates.

- prepare all financial returns for the DFES, LEA and other central and local government agencies within statutory deadlines.
- be responsible for seeking professional advice on insurance and advising the Governors on the appropriate insurance for the school. Implementing the approved insurance's and handling any claims that arise.
- be the point of contact with the DFES and other agencies with regard to grant applications, gifts and other donations.
- negotiate, manage and monitor contracts, tenders and agreements for the provision of support services Purchase, either directly or indirectly the school's energy supplies.
- maximise income generation within the ethos of the school.

## **Personnel**

- be responsible for personnel matters relating to staff - medical, child protection, and issue contracts of employment. Give advice to Governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal. To maintain confidential staff records.
- advise the Governors on the policy needed to comply with legislation concerning employment protection, equal pay, sex discrimination, etc and the implementation of those policies on the school.
- Be jointly responsible, along with the Office Manager, for the professional development, appraisal and training of the administrative staff.

## **Premises**

- be responsible for the letting of the school premises to outside agencies and school staff.

## **Administration**

- be responsible for the maintenance of Pupil Records (within SIMS) including when appropriate the Assessment Process.
- act as correspondent for the DFES and be responsible for records and returns required.
- be responsible for obtaining the necessary licenses and permission and ensuring their relevance and timeliness.
- be responsible for the systems and general management of the school's administrative and financial computer network, the implementation of appropriate Management Information Systems and the full computerisation of the administration accounting and record system.
- Handle all other matters of an administrative nature which may arise.

### **3.2 Job description - Primary School**

**Job Description:** School Secretary

**Responsible to:** The Headteacher

#### **Job Purpose**

To provide a full secretarial and administrative service to the Headteacher and the school.

#### **Job Activities**

##### **Secretarial Duties**

- Consulting with the Headteacher on a daily basis to agree work priorities and to keep the Head up to date on issues relating to the office.
- Maintaining a diary of appointments and activities for the Headteacher and the school.
- Dealing with confidential correspondence including staffing information, budgets and letters to and from parents.
- Managing the school administration IT systems, including resolving problems with assistance from IT Services, ensuring backups are made and passwords are managed.
- Collating information for the completion of statistical returns for the school i.e. Form 7.
- Ensuring the year end routines are completed accurately.
- Inputting pupil data from admission forms on to the computer.
- Managing the day-to-day activities of the office including dealing with queries, sending faxes, photocopying, dealing with sick children.

##### **Financial Duties**

- Managing the day-to-day finances of the school by inputting invoices and preparing cheques for signing by the Headteacher.
- Managing the day-to-day operation of the school bank account, paying monies in and completing bank reconciliation.
- Inputting income and expenditure information and profiling budget headings.
- Monitoring expenditure to raise issues with the Headteacher.
- Managing the school fund in relation to school uniforms, school trips, etc.
- Processing orders and payments for stationery, equipment, books, etc.
- Banking school monies for dinner money, funds raised, etc.

### **Other Duties**

- Seeking quotes for equipment, transport etc.
- Liaising with contractors for building work and furniture orders.
- Completion of time sheets for non-teaching staff.
- Completion of time sheets for weekly/monthly paid staff.
- Ensure procedures are written down so that in the event of illness or unpaid leave the administration of the school can run smoothly.

### **Duties of School Secretary**

#### **Monday/or the first day of the week. All day**

- Dinner money to be entered on Dinner Registers, balanced, change given, Giro made out and banked at the village Post Office.
- Collect any other monies i.e. swimming, children's bank money, school fund, etc.
- Enter onto records.
- Make out orders.
- Open mail and deal with same i.e. either pass onto Headteacher/teachers kitchen staff, etc.
- Answer all phone calls, sort out any queries, welcome and attend to visitors.
- Code purchase invoices, after matching with our order numbers, keep an electronic record (computer used for accounts, administration manager and word processing).
- Update Policies (electronic records).
- Write letters/answer letters/queries.
- Putting information onto floppy disk for North Yorkshire County Council (when applicable).
- Sending out and obtaining any staff application forms whenever there is a vacancy
- Drafting and typing letters to personnel department, in preparation for employing new staff. (This is quite involved and takes some time).
- Liase with Headteacher.

#### **Wednesday. Morning only**

- Collect monies and bank books for children's school bank, enter money into bank books and on weekly transaction pad for bank/ Balance and make out paying in slip. Seal bank bag in readiness for taking to bank in Rippon. Mr Waters takes this to the bank every week.
- Answer phone calls, deal with queries. Attend to visitors, be they parents or representatives workmen, etc.
- Open the mail, answer letters, queries, clear invoices as they arrive and put in the red bag in readiness for posting to County Hall on Fridays.
- Updating Administration Manager when appropriate.
- Liase with Headteacher.

### **Thursday morning only – extra admin time**

- School Fund transaction dealt with this morning as swimming money comes in on a Thursday. Some parents send swimming money on Monday with dinner money.
- Open mail, etc.
- Filing where necessary.

### **Friday all day until 5pm**

- All salary forms to be dealt with each month. MSA Pre-lists dealt with each week.
- Sal 7 (c) Supply Claim forms for Teaching Assistants to be dealt with each week.
- Extra Admin Support forms to be dealt with monthly.
- SA25 Pupil Movement to be dealt with monthly. (Nil return when appropriate).
- Sal 4 Teacher Supply Forms sent off.
- Local Purchase Account to be dealt with (added up, balanced, all receipts checked, all entries put through computer and sent petty Cash Claim to County with relevant receipts).
- All dinner registers added up, balanced and figures collated and entered on SC1 for North Yorkshire Caterers, also SCB Green Form completed for caterers
- Half-term end and Staff Absence Scheme form to be filled in (Nil return where appropriate).
- Check School Fund Bank Statement with School Fund Expenditure Analysis when statement received.
- Check Local Purchase Account Bank Statement with petty Cash Book.
- Open Mail deal with relevant queries/problems.
- Red Bag to County Hall today.
- Filing where necessary.
- Liase with Headteacher.

### **3.3 Job Description – Special School**

#### **Post: School Secretary and Finance Officer**

#### **Job Purpose**

Under the overall direction of the Headteacher to Provide secretarial and administrative support to the staff and Governors of the school, undertaking a range of financial, clerical, typing and reception duties and ensuring the efficient operation of the school administrative and office support systems. This includes administration of the schools finances and provision of financial information to the Headteacher and Governors within the scheme for Local Management of Schools.

#### **Main Duties and Responsibilities**

1. To provide a confidential secretarial and comprehensive administrative support service to the Headteacher and staff of the school including typing, maintaining

general and confidential filing systems, making appointments, maintaining a diary and organising the school office to ensure that routine functions are undertaken efficiently.

2. To undertake other miscellaneous administrative duties such as the ordering of materials and resources, receiving deliveries, liaising with outside contractors/suppliers, arranging school trips, transport and insurance, administering the school's letting policy and generally ensuring the smooth administration of the school in its contact with the outside world.
3. To provide a reception and telephone enquiry and answering service ensuring that all visitors and callers are dealt with promptly and enquiries handled and information provided in courteous and friendly manner, issuing visitor passes and assisting to maintain security at the school.
4. To be the initial contact on Health and Safety matters within the school reporting any issues to the Headteacher or other responsible person, undertaking minor first aid responsibilities where appropriate and ensuring sickness is reported as required and emergency services called if necessary.
5. To be responsible for the administration of staff records, including the maintenance of the SIMS Personnel Module and the updating of staff personal files, keeping accurate records of absences, checking personal documentation and providing returns and routine personnel management information.
6. To administer the process of personnel appointments and terminations for teaching and support staff.
7. To ensure that pupil personal records, medical records and other registers and documentation are accurately maintained, pupil movements recorded, admissions procedures undertaken, records despatched whenever necessary and statistical returns made as and when required.
8. To be responsible for the supervision of relevant school office staff, that is normally clerical / receptionist staff, along with the allocation of their work and the procedures for the induction, review and training of those staff.
9. To be responsible, within the LEA's financial guidelines, for the administration of the School accounts and other funds in accordance with the requirements of the Headteacher and Governors.
10. To prepare information for budget planning and produce the necessary budgetary documentation to support and assist the Headteacher and Governors in the budget planning and formulation process, inputting the annual budget into the SIMS FMS6 system.
11. To undertake, using the SIMS FMS6 schools accounts system and other systems where appropriate, the administration of orders, invoicing and payments, forecasting expenditure, monitoring and reconciliation of the budget and preparation of financial reports for the Headteacher and Governors as and when required.
12. To administer, maintain and provide reconciliation for petty cash and other schools

accounts and funds, including dinner and milk money accounts, within Local Authority guidelines, providing regular reports and producing accounts as appropriate.

13. To operate, where appropriate, a cheque book system for the school, printing cheques, preparing relevant reports, VAT returns and carrying out necessary reconciliation.
14. To liaise with relevant B&NES LEA staff, particularly from Education Finance, the schools IT Unit and Schools Personnel, within the terms of the relevant Service Level Agreement.
15. To produce statistical returns and reports when required for the DFES and LEA.
16. To undertake other duties at the request of the Headteacher and/or Governors and in the absence of the Headteacher to deal with day to day problems as they arise reporting situations to other members of staff as appropriate and assuming a key holding function when appropriate.

## **Qualifications and Experience**

### **Essential**

- The postholder should possess a minimum of 3 GCSE passes at Grade C or above including English Language.
- RSA 11 or equivalent and evidence of advanced word processing training and experience.
- 3 – 5 years experience in a secretarial, administrative or financial role.
- Good communication and inter-personal skills and a high degree of initiative. Knowledge of financial and accounting procedures.

### **Desirable**

- BTEC in Business and Finance, part qualified AAT or equivalent. NVQ Level 3 or 4 in School Administration.
- Experience as an accounting technician or 3 – 4 years' relevant experience in a financial environment in Local Government and / or previous schools experience.





## Appendix 6 Administrative tasks carried out by administrative staff

### Secondary schools

Tables 6.1 to 6.3 show the type and frequency of tasks that administrative staff carried out for secondary school teachers

**Table 6.1: Daily tasks (Secondary school administrators)**

	%
Photocopying	92
Contacting parents	91
Preparing materials/resources	72
Chasing absence	71
Collecting money	71
Analysing attendance data	23
Registration	23
Administer/clerking exams/NC assessments	17
Work relating to specific responsibilities	15
Other	11
Preparing report sets	9
Processing exam/NC assessment marks	7
Preparing for/responding to school inspection	5
Work related to school policy making/target setting	5
Analysing pupil performance data	3
Marking	1

(N=151)

*Survey participants were able to give more than one response*

**Table 6.2 Weekly tasks (Secondary school administrators)**

	%
Analysing attendance data	34
Work related to school policy making/target setting	15
Administer/clerking exams/NC assessments	13
Chasing absence	13
Collecting money	13
Preparing materials/resources	13
Preparing report sets	10
Processing exam/NC assessment marks	9
Preparing for/responding to school inspection	8
Analysing pupil performance data	7
Contacting parents	7
Work relating to specific responsibilities	7
Photocopying	5
Registration	4
Marking	1
Other	1

(N=151)

*Survey participants were able to give more than one response*

**Table 6.3: Termly tasks (Secondary school administrators)**

	%
Preparing report sets	49
Processing exam/NC assessment marks	40
Work related to school policy making/target setting	32
Preparing for/responding to school inspection	26
Administer/clerking exams/NC assessments	25
Analysing pupil performance data	24
Analysing attendance data	19
Collecting money	4
Chasing absence	3
Marking	3
Contacting parents	1
Other	1
Photocopying	1
Preparing materials/resources	1
Registration	1
Work relating to specific responsibilities	1

(N=151)

*Survey participants were able to give more than one response***Primary schools**

Tables 6.4 to 6.6 show the type and frequency of tasks that administrative staff carried out for primary school teachers

**Table 6.4 Daily tasks (Primary school administrators)**

	%
Contacting parents	78
Collecting money	74
Photocopying	57
Chasing absence	29
Preparing materials/resources	25
Analysing attendance data	12
Registration	12
Work relating to specific responsibilities	7
Other	5
Preparing for/responding to school inspection	3
Analysing pupil performance data	2
Work related to school policy making/target setting	2
Administer/clerking exams/NC assessments	1
Marking	1
Preparing report sets	1
Processing exam/NC assessment marks	1

(N=183)

*Survey participants were able to give more than one response*

**Table 6.5: Weekly tasks (Primary school administrators)**

	%
Chasing absence	30
Analysing attendance data	29
Photocopying	18
Collecting money	16
Contacting parents	15
Preparing materials/resources	15
Work relating to specific responsibilities	7
Registration	5
Other	4
Work related to school policy making/target setting	4
Analysing pupil performance data	3
Preparing report sets	3
Preparing for/responding to school inspection	2
Administer/clerking exams/NC assessments	1
Marking	1
Processing exam/NC assessment marks	1

(N=183)

*Survey participants were able to give more than one response*

**Table 6.6: Termly tasks (Primary school administrators)**

	%
Processing exam/NC assessment marks	36
Analysing attendance data	33
Work related to school policy making/target setting	32
Administer/clerking exams/NC assessments	31
Preparing for/responding to school inspection	28
Preparing report sets	26
Analysing pupil performance data	15
Chasing absence	13
Preparing materials/resources	8
Collecting money	4
Other	4
Photocopying	4
Registration	4
Work relating to specific responsibilities	4
Contacting parents	1
Marking	1

(N=183)

*Survey participants were able to give more than one response*

## Special schools

Tables 6.7 to 6.9 show the type and frequency of tasks that administrative staff carried out for special school teachers

**Table 6.7: Daily tasks (Special school administrators)**

	%
Contacting parents	81
Collecting money	76
Photocopying	63
Chasing absence	44
Preparing materials/resources	26
Registration	26
Analysing attendance data	14
Work relating to specific responsibilities	14
Other	13
Preparing report sets	11
Preparing for/responding to school inspection	9
Work related to school policy making/target setting	3
Administer/clerking exams/NC assessments	1
Analysing pupil performance data	1
Marking	0
Processing exam/NC assessment marks	0

(N=80)

*Survey participants were able to give more than one response*

**Table 6.8: Weekly tasks (Special school administrators)**

	%
Chasing absence	33
Analysing attendance data	30
Collecting money	19
Preparing materials/resources	18
Contacting parents	16
Preparing report sets	15
Photocopying	13
Registration	10
Preparing for/responding to school inspection	8
Work relating to specific responsibilities	8
Work related to school policy making/target setting	5
Marking	4
Other	4
Analysing pupil performance data	1
Administer/clerking exams/NC assessments	0
Processing exam/NC assessment marks	0

(N=80)

*Survey participants were able to give more than one response*

**Table 6.9: Termly tasks (Special school administrators)**

	%
Work related to school policy making/target setting	45
Analysing attendance data	39
Preparing for/responding to school inspection	36
Preparing report sets	31
Analysing pupil performance data	18
Preparing materials/resources	11
Work relating to specific responsibilities	11
Processing exam/NC assessment marks	10
Administer/clerking exams/NC assessments	8
Photocopying	8
Other	4
Registration	3
Chasing absence	1
Contacting parents	1
Collecting money	0
Marking	0

(N=80)

*Survey participants were able to give more than one response*