

report of the chartered teacher review group

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Scottish Government
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EH1 3DG

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contents

1. Introduction	1
2. Background to current scheme	2
3. Issues considered by the CT Review Group and its recommendations	8
Annex A	18





1. Introduction

- 1.1 In December 2006 the then Minister for Education and Young People, Hugh Henry announced that the Chartered Teacher (CT) scheme was to be reviewed. The Review Group's membership was

Membership:

Chairman (former Director of Education North Lanarkshire Council)	Michael O'Neill
ADES	(Gillian Brydson)
AHDS	(Irene Matier)
Scottish Teacher Education Committee (STEC)	(Ian Smith)
CoSLA	(Penny Curtis)
EIS	(Dougie Mackie)
GTCS	(Tom Hamilton)
HAS	(Bill McGregor)
HMIE	(Susan Gow)
National CPD Team	(Margaret Alcorn)
Schools Directorate	(John Gunstone)
Society of Personnel Directors in Scotland	(David Archibald)
SSTA	(Albert McKay)
Schools Directorate (Secretary)	Scott Brand

The Group's remit is attached at Annex A. The Group first met on 24 April 2007 and have subsequently met on 5 other occasions since then with their last meeting held on 23 November 2007. The Group have produced this report with recommendations for the Scottish Ministers to consider.



2. Background to current scheme

McCrone Report

- 2.1 The independent Committee of Inquiry into Professional Conditions of Service for Teachers (McCrone Committee) looked very closely at the existing promotion and management structures in Scottish schools. They found that the only way for individual teachers to seek career and salary progression was to apply for management posts which would ultimately take them further away from the activity which had attracted them to the profession – classroom teaching – and into administrative and management activities, for which they might have neither the qualifications nor the inclination. There was no career track for teachers who wanted to stay in the classroom; the prospects for teachers who did not want to seek management responsibility were very poor. They quickly became stuck at the maximum salary point for a classroom teacher, possibly for as long as 30 years.
- 2.2 The Committee considered that the career structure for the teaching profession must provide adequate opportunities for advancement for those teachers who do not wish to seek management posts, but to remain primarily in the classroom, practising and developing their expertise in teaching and learning. There should be a career pathway within the teaching profession which recognises and rewards the achievement of excellence in classroom teaching, without requiring a move into school management.

A Teaching Profession for the 21st Century (TP21) – Agreement Reached Following McCrone Report

- 2.3 In September 2000, Ministers established an Implementation Group to make recommendations to the Scottish Executive on the matters raised in the McCrone Report. The Implementation Group was tripartite, with membership drawn from all of the teacher organisations, employers (through COSLA) and from the Scottish Executive. With regard to the CT scheme the Group said “Progression through the CT grade will be by qualification, with access open to teachers who have relevant experience and who have maintained a CPD portfolio. There is a need to design transition arrangements which take full account of prior learning and describe an accelerated route based on folio submission with evidence covering the core activities undertaken within the qualification route.”

2.4 It also outlined the following duties for a classroom teacher/Chartered Teacher.

“Subject to the policies of the school and the education authority the duties of teachers, promoted and unpromoted, are to perform such tasks as the Headteacher shall direct having reasonable regard to overall teacher workload related to the following categories:-

- (a) teaching assigned classes together with associated preparation and correction.
- (b) developing the curriculum.
- (c) assessing, recording and reporting on the work of pupils.
- (d) preparing pupils for examinations and assisting with their administration.
- (e) providing advice and guidance to pupils on issues related to their education.
- (f) promoting and safeguarding the health, welfare and safety of pupils.
- (g) working in partnership with parents, support staff and other professionals.
- (h) undertaking appropriate and agreed continuing professional development.
- (i) participating in issues related to school planning, raising achievement and individual review.
- (j) contributing towards good order and the wider needs of the school.”

Selection Process

2.5 To be eligible to embark on the CT scheme, a teacher must:

- have a recognised teaching qualification;
- be fully registered with the GTCS;
- be at the top of the main grade salary scale; and
- have maintained a CPD portfolio.

2.6 All teachers who wish to achieve CT status must first apply to the GTCS to establish their eligibility. This is regardless of which route they choose to take.



Detail of Routes

2.7 There are 2 ways in which eligible teachers can undertake the CT scheme:

- The programme route – by completing a number of core modules and option modules with an accredited provider.
- The accreditation route – by submitting portfolio and commentary demonstrating how they meet the Standard for Chartered Teacher (SCT) through the accreditation of prior learning.

The Programme Route

2.8 The Programme Route is often referred to as the modular route because it involves teachers undertaking a structured course of developmental study and work based projects with an accredited CT provider. Teachers are required to complete a total of 12 modules (a total of 180 credit points) before making a claim for CT status. After completing module 1 on self evaluation, teachers are required to complete a further:

- 3 core modules;
- 4 option modules; and
- and the equivalent of 4 modules for a work-based project.

2.9 Core and option modules can be taken with one of the accredited CT providers. These are higher educational institutions in Scotland that have gone through a rigorous accreditation process and have shown that the modules they offer meet the criteria in the SCT. The core and option modules do not need to be completed in any particular order, although some providers may suggest an appropriate route.

Core Modules

- 1 – Self evaluation;
- 2 – Learning and Teaching;
- 3 – Education for All;
- 4 – Working Together.

2.10 There is a wide variety of option modules to choose from and candidates should seek advice from their provider before embarking on a particular module. Option modules can relate to:

- The core modules;
- Working with pupils at different stages of the school;
- Core skills;
- Curriculum and subject specialism;
- Responding to individual pupils needs;
- Inclusion;
- ICT;
- Independent study modules.

2.11 The final piece of work required of the Programme Route is the submission of work based projects. This may be:

- One project equivalent to 4 modules; or
- Two projects equivalent to 2 modules each.

APL through the Programme Route

2.12 Accreditation of Prior Learning (APL), in relation to the CT Programme Route, is a process which enables teachers to gain academic credit for either formal certificated learning (existing certificates or diplomas), or experiential learning (through developing practice or by attending non award bearing courses). After successful completion of module 1 on self evaluation candidates are able to claim up to a maximum of 6 modules as prior learning. Accredited CT providers all have slightly different rules and procedures for dealing with this process. All APL claims must be matched to the SCT. Theoretical study and analysis must be clearly linked to the enhancement of professional practice.



The Accreditation Route

- 2.13 The Accreditation Route has been designed for experienced teachers who are confident that their professional actions are already at CT level and who have sufficient evidence and commentary to support their application. After successfully completing module 1 on self evaluation, teachers can choose to sign up with the GTCS to complete the remainder of their CT scheme, the equivalent of 11 modules, by preparing and submitting an Accreditation Route claim. This claim is the equivalent of a masters degree and it should be noted that the work submitted is expected to be of a comparable standard.
- 2.14 The Accreditation Route involves candidates submitting a portfolio and commentary based on current and recent practice which shows how the teacher has met all the competencies of the SCT. There are 2 phases to this route:
- The Advisory Phase – after submitting their application teachers are allocated an adviser;
 - The Assessment Phase – once teachers complete and submit their claim to the GTCS, this is assessed by independent assessors.

CT Duties/Contribution

- 2.15 The contribution that a CT can or should make to the wider school improvement agenda has not been made explicitly clear. The McCrone Report did expect that CTs would act as role models for junior colleagues and offer a wide contribution to the school on learning and teaching while being a resource for the school and wider local authority. What is clear is that CTs will not have any additional management burden to that experienced by a teacher at the top of the main grade. This is formalised in the TP21 Agreement at Annex B.
- 2.16 The SEED/National CPD Team booklet “Chartered teacher Status: Frequently Asked Question” says “CTs should demonstrate the capacity to contribute to the professional development of colleagues and to make a full contribution to the educational effectiveness of the school and wider professional community”.

- 2.17 The Standard for Chartered Teacher (SCT) says “the CT will be committed to influencing and having a leading impact in team and school development, and to contributing to the professional development of colleagues. As a member of a wider professional community, he or she will be committed to influencing the development of teaching and learning, and to strengthen partnerships with other professional groups, parents and other agencies”.
- 2.18 Occasional Paper 1 from the National CPD Team issued in August 2005 listed some suggested principles that would be helpful in considering the contribution a CT can make. These are:
- CTs will not be asked to undertake management roles;
 - the focus of the contribution that CTs make will be on learning and teaching, and on strengthening partnerships with other professional groups, parents and other agencies. Such contribution will require to be agreed within the school;
 - CTs will continue to maintain a CPD portfolio tracking their professional development against the SCT, and their professional review and development will focus on this portfolio;
 - any work-based development or project that CTs undertake will be agreed with their line manager and resourced, including the allocation of time;
 - CTs will share their enhanced professionalism with colleagues and will seek opportunities to influence the development of teaching and learning.



3. Issues considered by the CT Review Group that led to recommendations

- 3.1 During the course of the Review Group's meetings they heard from a wide variety of interested groups. These were:

Katrina Bowes, Tapestry and Irene Watters, Inverclyde Council – Tapestry Modules;
Ann Carnachan, Falkirk Council – Leading Teacher Initiative;
Margaret Alcorn, Edinburgh Council – Enhancing Classroom Practice Course;
Dougie Atkinson, Teachers Agreement Communication (TAC) Team – Contribution of CTs;
Jim Maclean, Academic Director (CPD), University of Paisley – Content and Nature of CT Course;
Joe McGeer, CPD Teaching Fellow, University of Paisley – Research into CT scheme;
Marjory McMahon, Glasgow University – Impact of CTs and their views;
Jenny Reeves, Stirling University – Impact of CTs and their views.

They also received and discussed submissions from Cosla, EIS, GTCS and the CT course providers.

- 3.2 The Group wish to highlight their support for the original principle behind the CT scheme which was stated by the McCrone Committee in their Report (see para 2.2). The recommendations in this Review Report are intended to continue to support and further develop the CT scheme in line with the original principle.

3.3 Standard for Chartered Teacher (SCT) and CT Modular Route Format

The Group felt that as CT is a relatively new initiative this is an appropriate phase in the scheme to review and update the SCT. The SCT denotes the level of professional accomplishment teachers might seek to achieve, after completing the Standard for Full Registration and once established in the profession. The basic assumption is that CTs are characterised by 4 central professional values and personal commitments:

- effectiveness in promoting learning in the classroom;
- critical self-evaluation and development;
- collaboration and influence; and
- educational and social values.

The Group acknowledged the continuum of standards covering the teaching profession – the Standard for Initial Registration, the Standard for Full Registration, the Standard for Chartered Teacher and the Standard for Headship. Within the last two years all the standards apart from the SCT have been revised. This has provided an opportunity to ensure that there is coherence and cohesion between the standards. The SCT is now almost 5 years old and it is an appropriate time to review the SCT within the wider continuum of Standards. Any revision of the SCT would involve wide consultation and would start from a presumption of seeking neither to raise nor lower the SCT, but of a need to update the standard to maintain consistency and continuity with the other standards.

The modular format, which all providers are required to have accredited by the GTCS, was initially set out for providers in terms of having four core modules, four option modules and the final work based learning project or projects. This also now needs to be reviewed in light of experience to date by those undergoing the modular route and the effect on teachers, pupil learning, schools and local authorities.

Recommendation 1:

That the GTCS should, in consultation with all relevant stakeholders, review the SCT and the CT modular route format.



3.4 Eligibility Criteria

At present the eligibility criteria are that teachers seeking CT status must:

- be at the top of the main grade pay scale (usually takes 5 years beyond probation to achieve);
- be fully registered with the GTCS; and
- have maintained a CPD Portfolio.

The Group wished to strengthen the eligibility process to ensure that those entering the scheme could show evidence of good classroom practice and high professional standards. This should provide assurance to the GTCS, who issue eligibility certificates, that the teacher has the ability to engage in appropriate enhanced professional practices as defined in the SCT and that he or she has a clear vision of their professional development. This should help enhance the status of CTs within the profession.

At present the portfolios that are submitted to the GTCS are of variable quality. The GTCS intend to draw up guidelines on the construction of a portfolio. They will fully consult with all other stakeholders when drafting the guidelines.

Teachers can assess their suitability for CT as part of their Professional Review and Development (PRD) discussion. PRD is the process whereby the development and training needs of all staff are identified and agreed in relation to the standard relevant to them. There is also a self evaluation tool being developed by LTS that will aid teachers in assessing themselves against the different standards and, therefore, their suitability for CT.

Recommendation 2:

To be eligible to embark on the CT scheme a teacher must be at the top of the main grade pay scale, be fully registered with the GTCS and have maintained a CPD portfolio, which itself must include robust, validated evidence of good classroom practice. The GTCS will issue guidelines on the construction of a portfolio.

3.5 Uptake of CT Scheme

As at September 2007 we had 521 full CTs and over 2,000 who were working their way through the scheme. The main issues affecting uptake are:

- cost – teachers have to self finance their way through the scheme. For the modular route the average module costs around £500 and each teacher has to complete 12 modules although they can claim up to 6 modules through the recognition of prior learning. For the accreditation route the cost is £1,200 (in addition to the cost of Module 1) for your portfolio (overall claim) to be assessed.
- time commitment – on average each module tends to take around 6 months to complete and involves around 150 hours work. The time involved in compiling a portfolio for submission to the accreditation assessment panel will vary according to each individual.
- salary enhancement – the CT salary scale has 6 points on it ranging from £32,688 to £38,868. Successful completion of 2 modules earns 1 salary point. On the accreditation route teachers move to the top of the CT scale if the submission of their portfolio is successful. Full CT status, therefore, awards a teacher £7,161 over the top of the main grade pay scale. The upfront costs of CT are typically paid back through salary increases from about 4 years into the programme route and then the salary enhancement gives a substantial extra financial reward to CTs.
- career progression – some teachers use CT as part of their career pathway to leadership and management roles. As the PT salary scale overlaps with the CT salary there are occasions where a teacher may find a move into management can be at a reduced salary.
- promotion of CT – in some areas the scheme is not actively promoted by either the local authority or school senior management team.

Recommendation 3:

All stakeholders should actively promote the CT scheme.



3.6 Progressing Towards the SCT Through School Based Experiences

The modular route blends academic study and practical school based activities and is delivered by universities in partnership with local authorities. This allows the route to be developmental and involve genuine transformational change for participants as they work through school based action research projects. However, at present classroom observation or wider authentication of school based evidence is not a prominent feature of the GTCS accreditation criteria for CT programmes. The Group felt that it was important that the assessment process links with classroom and wider professional practice relating to the SCT. However, it was acknowledged that snapshot observation did not always prove effective in capturing a true sample of evidence. The Group thought that the role of school based evidence should be formalised within the assessment process to ensure that providers have all relevant evidence before making a final assessment. This would strengthen the assessment process and also help link the school to the work of the candidate and offer an opportunity for more effective use of the CT following their qualification and while progressing towards it.

Recommendation 4:

All providers should review and re-submit their programmes to the GTCS to ensure that an appropriate proportion of validated school based evidence is a requirement of the programme.

3.7 Use and impact of CTs in schools

At present all classroom teachers have a contractual obligation to undertake tasks agreed with their headteacher. However, these tasks should reflect their sector and experience. The Group noted that there was a considerable amount of anecdotal evidence relating to inconsistent, insufficient and inappropriate deployment of CTs, that some headteachers were unsure as to what they could require of CTs, and that some CTs wanted to do more or less than was being required of them. The Group agreed that the role and duties of CTs and those undertaking the modular programme needed to be better defined. There was a need to develop a framework for authorities and schools that allowed them to define roles and duties within the normal school decision making process. This should be based on the current duties of a classroom teacher/CT outlined in Annex B of TP21. Annex B does not allow for the allocation of management duties but does cover categories such as curriculum development and whole school planning. CTs were also envisaged as lead learners and mentors within schools although duties would not increase their contracted hours. This would strengthen the original aim of CTs bringing benefit to the school and developing themselves while enhancing their status.

Teachers are contractually obliged to undertake 35 hours CPD each year. To date it has been a decision for agreement between both the teacher and line manager on whether the programme work of CT might justifiably count towards the 35 hours. The 35 hours CPD should be based on school, local and national priorities along with individual needs. However, the modular programmes have developed and linked their work closely with participants' school improvement plans. It would now seem that nearly all CT modular work could justifiably be counted towards the annual 35 hours CPD.

The Group agreed that there was a lack of evidence around the impact on and outcomes for learning and teaching of the CT scheme. HMIE did not currently collect this information and they do not normally focus activities around individually identifiable teachers. The Group also thought that any data collection would need to be based on clear expectations of what CTs should be doing in school. One possibility was commissioning a research project although this may only provide a snapshot in time rather than routine information on the impact of the scheme.



Recommendation 5:

Headteachers should continue to discuss and agree with CTs, and those following the modular programme, the duties from Annex B of TP21 that they should perform. These tasks should be appropriate to their sector, experience and related to the SCT.

Recommendation 6:

Headteachers should ensure that CTs are allowed to link their CT modular work with their annual 35 hour CPD activities.

Recommendation 7:

The Scottish Government should take steps to routinely capture information on the impact of CTs in school. This should cover impact in its broadest possible terms and include the views of colleagues, pupils and parents.

3.8 Maintaining the SCT

The Group felt that there was a need to ensure that CTs were constantly challenged and developed in their duties. One way to encourage this would be to highlight current good practice that all teachers should be maintaining the Standard relevant to them and evidencing this within the Professional Review and Development (PRD) process. CTs should be well placed through their professional commitment to critical self evaluation and development to provide evidence that they are maintaining the SCT. One issue that had arisen is when a teacher who could have accumulated for example between 6 and 10 modules and decides to either stop the programme or delay it for a few years. The teacher is not yet a CT but should be operating at a level higher than normal classroom teacher and is receiving a salary enhancement to reflect this. There is some confusion as to which Standard they should be working to.

Recommendation 8:

A teacher who embarks on the CT scheme should inform their Headteacher of this.

Recommendation 9:

CTs and those working towards CT status should ensure that their portfolio is benchmarked against the SCT for the purposes of the PRD process.

Recommendation 10:

Local authorities should ensure that locally agreed procedures are in place to ensure that schools monitor, as with all teachers, that their CTs are continuing to meet the SCT.



3.9 Future of the APL Route

The current accreditation route ends in 2008 and the Group agreed that it has met its original purpose of allowing those teachers who may have been working at the level of CT to make a claim based on recognition of prior learning. The modular route already offers flexibility to claim up to 6 modules by recognition of prior learning which should satisfy experienced teachers and leave enough opportunity in the remaining modules to also experience transformational change. The Group has also considered evidence from University providers, indicating the potential for ongoing development of further flexibilities within the provider routes, which can include scope for enhanced choice around personal professional action.

However, teachers have individual preferences on the way professional development is provided, and there may be a case for widening choice for aspiring CTs in meeting these. The Group, therefore, considered that the Scottish Government should explore whether another route or routes to achieving CT should be established at some time in the future. The principle behind establishing another route to CT would be based on the assumption that it would result in a professional award of CT. At present the modular route results in the award of a Masters degree from the university provider and professional award of CT from the GTCS. The Scottish Government are currently piloting flexible routes to achieving the Standard for Headship (SfH) which aims to allow teachers to gain the professional award of the SfH rather than follow the post graduate diploma route offered by universities through their Scottish Qualification for Headship (SQH) course. It would be consistent in terms of professional development if other routes to achieving CT were available after appropriate piloting and evaluation.

Recommendation 11:

The GTCS should close access to the accreditation route in 2008 as originally planned but also ensure that arrangements are put in place to assess those participants currently on the route within a stated timescale.

Recommendation 12:

The Scottish Government should consider the possible development of other flexible routes to a professional award of CT.

**Scottish Government
Schools Directorate
Teachers Division
June 2008**



Annex A

MAIN AREAS AND ISSUES FOR THE REVIEW TO CONSIDER

Eligibility criteria, assessment process, maintenance of Standard and age profile of those undertaking the CT scheme – in particular:

- analyse the age profile of chartered teacher candidates in each year since inception of the scheme in August 2003;
- consider in conjunction with stakeholders the implications of the self nomination aspect of the scheme and whether candidates should be invited to seek endorsement by senior colleagues;
- consider how chartered teachers might demonstrate that they are maintaining the standard for chartered teacher;
- consider whether classroom observation should become an element of the assessment process.

Use of Chartered Teachers in schools and the future career ambitions of Chartered Teachers – in particular:

- explore how new teachers perceive chartered teacher status – e.g. whether they see CT status as a career destination or a career step;
- consider the views of teachers, school managers, local authority directorates and other stakeholders (including pupils) as to the most appropriate ways in which CTs can add value to the teaching and learning in their schools;
- consider how the skills of CTs can best be used in schools to enhance the quality of learning and teaching across the school community as a whole;
- consider how CTs can best impact on pupils and improve their outcomes.

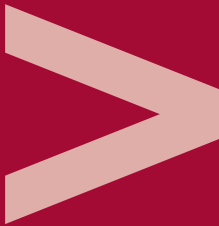
Issues affecting uptake of Chartered Teacher scheme – in particular:

- explore the cost element of the CT scheme and its effect on uptake;
- explore the workload implications of undertaking a CT scheme;
- identify what other barriers there are to access to CT scheme and consider how they might be overcome.

Future of the accreditation route, does the Standard need updating, local promotion of the Chartered Teacher scheme – in particular:

- › consider what if anything should be available by way of an alternative route to chartered teacher status post August 2008;
- › does the Standard for CT need refreshed in light of what duties CTs are actually carrying out;
- › should authorities be obliged to promote the CT scheme.





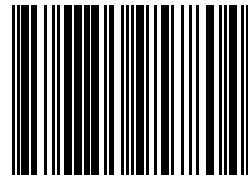
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