

2 September 2009

Dear Colleague

**TEACHER WORKLOAD**

The SNCT has approved the Teacher Workload Report prepared by the Review of LNCTs Working Group. The Report is appended and has been drawn from responses received from LNCTs on initiatives that they are undertaking in relation to managing teacher workload. The Report provides advice and shares best practice regarding the management of workload.

The SNCT recognises that there are still issues to be addressed by LNCTs regarding teacher workload and the SNCT will continue to monitor activities in this regard, offering both advice and support in order to assist with any workload issues that may arise.

As the Report states, each LNCT should develop a workload action plan. LNCTs should also develop mechanisms to keep the plan under review and to report the plan and review mechanism to the SNCT.

This Report should be placed on the agenda of your LNCT for discussion and action.

Yours sincerely

Tom Young (Employers' Side)  
Drew Morrice (Teachers' Panel)  
Stephanie Walsh (Scottish Government)

**Joint Secretaries**

To: LNCT Joint Secretaries  
Cc: Chief Executives  
Directors of Education  
Directors of Personnel  
Directors of Finance

**COSLA**

Rosebery House  
9 Haymarket Terrace  
Edinburgh  
EH12 5XZ  
T: 0131 474 9200  
F: 0131 474 9292  
E: tomy@cosla.gov.uk

**Teachers' Panel**

46 Moray Place  
Edinburgh  
EH3 6BH  
T: 0131 225 6244  
F: 0131 220 3151  
E: dmorrice@eis.org.uk

**Scottish Government Schools Directorate**

Teachers Division  
2C South Victoria Quay  
Edinburgh  
EH6 6QQ  
T: 0131 2440230  
F: 0131 244 0957  
E: Stephanie.walsh@scotland.gsi.gov.uk

**REPORT ON TEACHER WORKLOAD****1. Background**

- 1.1 The 2001 Agreement introduced a 35 hour working week for teachers in Scotland.
- 1.2 The Agreement established 3 categories of teachers' time: class contact time, which was to reduce to a maximum of 22.5 hours across all sectors, personal time which was one third of class contact time and the use of time remaining which was subject to agreement at establishment level.
- 1.3 The Agreement also stated that, from August 2006, at the earliest, teachers' contractual obligations would be expressed solely in relation to class contact time and the use of the time remaining. This stage, Stage 4 of the implementation of the Agreement on working hours required the SNCT to sample workload.
- 1.4 In 2005 the Scottish Executive Education Department (SEED) commissioned research on workload. The Commission was undertaken by the University of Glasgow, Faculty of Education. The report was issued in August 2006. The can be found on the SNCT website ([www.snct.org.uk/workingpapers.php](http://www.snct.org.uk/workingpapers.php)).
- 1.5 At the SNCT meeting in September 2006 the SNCT agreed to evaluate working arrangements at local level to assess the wider cultural climate in schools. When this evaluation was considered the SNCT agreed that the criteria in Annex D of the Agreement did not exist in sufficient extent to move to Stage 4 of the Agreement on working hours.
- 1.6 The SNCT developed its work through the SNCT Working Group, Review of LNCTs. The Review of LNCT Working Group issued advice on Working Time Agreements in January 2008 and in that correspondence LNCT Joint Secretaries were advised that the SNCT would be seeking evidence of how LNCTs were assessing control of teacher workload. The Working Group considered responses from all LNCTs and identified a number of key issues (Appendix 1). This report reflects on the key issues which were identified.
- 1.7 A letter was issued by the Joint Secretaries in June 2008 which required a response from each LNCT on any initiatives or advice at Council or establishment level to address workload and any evaluation of the effectiveness of workload initiatives/advice.
- 1.8 The Review of LNCTs Working Group has considered responses received from all LNCTs. These responses have formed the basis of this report.

**2. Introduction**

- 2.1 The SNCT endorses a view that there is no single approach to addressing teacher workload. This report is designed to stimulate discussion within LNCTs and within establishments.
- 2.2 However, there are a number of common features emerging in responses which underpin initiatives on trying to manage teacher workload. These are: (i) a commitment to collegiality at council level and establishment level; (ii) clear guidance on working time agreements; (iii) clear monitoring procedures; (iv) evaluation of current arrangements leading to further advice; (v) particular initiatives focussed on controlling workload.

**3. Collegiality**

- 3.1 The development of collegiality is critical to the success of the 2001 Agreement and the SNCT set out a Code of Practice. (Appendix 1.4, SNCT Handbook). The establishment which strives towards collegiality is best placed to manage workload.
- 3.2 The SNCT commends the practice of LNCTs holding events or conferences to develop collegiality. Such events inform not only participants, but can inform all teachers and headteachers by sharing the outcome of such conferences and events. Some Councils have published the outcomes of such

events and distributed these to establishments. The document thereby becomes a focus for in school discussions and for sharing good practice.

- 3.3 A small number of LNCTs have been aware that collegiate working can be emphasised by the “badging” of advice on workload similar to the “badging” of LNCT agreements. This sets a clear message on the role of the LNCT within the Council.
- 3.4 While there is a need to plan and deliver conferences and events on a collegiate basis, the SNCT recognises that the commitment of key persons sends an important message to all parties. In particular, the Director of Education, or equivalent, can play a crucial part in developing collegiality by attending and contributing to events. If the ethos of collegiality is embedded in the work of the Council, and is seen to be led by example, there is more likely to be engagement at establishment level.
- 3.5 There is little evidence of direct participation of elected members in local events. At national level the SNCT has found that the role of elected members has contributed much to events, not least in the positive message it can create. The SNCT recognises the demands and pressures on senior elected members. Nevertheless, we would encourage consideration of the role of senior members in conferences and events.
- 3.6 The SNCT noted good practice in involving LNCT representatives in developing an authority wide improvement plan. This type of initiative is a very good example of developing openness and trust between the parties and breaks down some of the perceptions which can create difficulties between education officials and teachers’ representatives.
- 3.7 The SNCT also noted the involvement of teachers’ representatives in working groups of the Council, developing, for example, policies on forward planning and reporting. This type of joint working not only fosters the development of collegiality it allows an open dialogue on workload issues. Where teachers’ representatives are bypassed on authority working groups an impression is created, intentionally or not, that collegiate working is narrowly circumscribed and relates to the work of the LNCT on matters devolved by the SNCT.
- 3.8 An alternative strategy is to empower schools to devise their own models of forward planning, assessment and reporting to minimise workload.
- 3.9 Another noteworthy initiative has been the willingness of some Councils to engage with teachers’ representatives in bureaucracy audits. While the bureaucratic requirements on schools will, in many cases, be necessary there is still a benefit in trying to examine the volume of demand and to consider how to manage and limit that demand.

#### **4. Working Time Agreements**

- 4.1 The SNCT notes that LNCTs have developed clear guidance to assist establishments to reach agreement on working time. Such advice is embedded in the work of the LNCT and reaching agreement at establishment level is a vital part of every school’s collective bargaining machinery.
- 4.2 LNCTs have developed mechanisms to monitor Working Time Agreements. It is not for the SNCT to advocate any single model of monitoring. LNCTs will have to consider issues of capacity, in relation to availability of LNCT members and the number of establishments in each Council. In many cases the monitoring of returns is supplemented by school visits, either on a random basis or targeted to situations where concern is raised by a return. Random sampling or analysing all responses are examples of good practice. Some LNCTs publish all WTAs to assist schools and this approach is commended to all LNCTs.
- 4.3 School visits require to be managed carefully and should be aimed at being supportive rather than being inquisitorial. The school visits should exemplify good practice in collegiate working by supporting and assisting colleagues in schools.
- 4.4 There is an acceptance by many LNCTs that evaluating Working Time Agreements is a complex area of work. However, a number of LNCTs recognise that schools can be supported in this process. The

evaluation of a WTA is crucial in adjusting arrangements for the following session and to allow teachers to recognise that evaluation of WTAs and consequent actions in terms of time allocations in the WTA is important in trying to manage workload more constructively. It can be a valuable stimulus for professional discussion on the most effective use of teachers' contractual time in delivering quality learning and teaching in the classroom.

- 4.5 While in service days are for school management to arrange a number of Councils have encouraged the use of such time to deliver authority priorities. One Council has established a practice of advising schools that the Council will ask school to reserve time on, say, 2 INSET days for authority priorities. These priorities are discussed within the LNCT before being passed to school level.
- 4.6 Another Council has encouraged specific sessions on collegiality issues on INSET at the start of the academic session. This allows staff to be involved in discussion on priorities for the session ahead and to plan workload and staff deployment in the session ahead.
- 4.7 In one Council area the Council, following LNCT discussion, targeted CPD resources to a number of CPD priorities. The Council recognised that this limited the wide diversity of personal development needs that arise from personal review meetings. The SNCT notes this approach but advises that limiting focussed CPD opportunities to a small number of specific objectives should be handled sensitively and have regard to individual CPD needs.
- 4.8 It is heartening to note that some LNCTs are not only reviewing Working Time Agreements through formal negotiating structures but are engaging directly with teachers. In some Council areas LNCTs have provided the opportunity for individual teachers to complete questionnaires or surveys on the work approach of LNCTs in aspects of its work, for example, the management of workload and the development of strategies to tackle workload. Such an approach is commended and can inform Councils on effective use of INSET time.

## **5. Individual Responsibility**

- 5.1 In setting out advice on workload, the SNCT acknowledges the finding in the SNCT workload research that all teachers have to consider their own workload:

"Few respondents indicated that their duties could be performed within the 35 hour planning framework. It would seem that for those participants the 35 hour week has set up an impossible ideal that they routinely work beyond.....A large number of comments referred to teachers' views of their own professionalism and the obligations they feel towards the children and to the teaching profession." (Paragraph 5.11)

- 5.2 Teachers can reflect on their own workload although it is recognised that teachers, like many other professionals, can work long hours from a sense that professional commitment obliges them to do so.
- 5.3 While LNCTs can set out mechanisms to assist and manage workload each teacher has a responsibility to critically examine workload demands, to exercise professional judgement on workload issues and to raise concerns when demands are unreasonable.
- 5.4 If the desire to provide an improved work-life balance is to be meaningful then there is an individual, as well as a collective, responsibility to bring this about. The SNCT report on the Teacher Working Time Research laid an obligation on LNCTs to undertake further work to assist teachers on task prioritisation. This is clearly relevant to teachers developing confidence to manage time more effectively.

## **6. Authority Support Measures**

- 6.1 The management of workload requires a commitment and support from the employer. This was evident in the requirement of the 2001 Agreement, set out in Annex E, that support staff should be introduced to remove from teachers a number of administrative and non teaching tasks that teachers should not be expected to undertake routinely.

- 6.2 In this regard there is concern that this element of the 2001 Agreement is under financial pressure in a number of Council areas. The SNCT had previously issued advice in relation to good practice across support staff. It is a requirement for both the SNCT and for LNCTs to monitor the provision of support staff and the impact of such staff on the workload of teachers. In particular, the obligation on all parties to ensure that the terms of Annex E of the Agreement are being met is a prerequisite to address teacher workload.
- 6.3 The SNCT has noted that a number of authorities have used QIOs in monitoring Working Time Agreements. The ultimate authority on such matters can only be the LNCT but, if this is understood, the support from QIOs in assisting establishments in workload management and collegiate working, is welcome. The approach taken by QIOs in assisting establishments should, by itself, be a model of collegiate working. There will be an implicit or overt message in this approach that the Council is acknowledging that teacher workload is central to managing improvements and the Council's process of supporting establishment self evaluation requires workload and collegiality to be addressed.
- 6.4 Another commendable initiative has been the introduction of guaranteed management time for promoted post holders. While all teaching staff have workload pressures, the burden on promoted staff is recognised in the University of Glasgow report for SNCT. Where the time for management is protected through a local arrangement or agreement, then there is an opportunity to manage the workload of promoted staff. A number of Councils had previously addressed management time and it is heartening that more Councils are making such provision.

## **7. Staff Health and Wellbeing**

- 7.1 A number of LNCTs have considered the question of teachers' workload in the broader context of health and wellbeing. This type of holistic approach offers the opportunity of placing workload in the context of key work stressors and of recognising that a reasonable and proper work-life balance can be crucial in enduring wellbeing in its broadest meaning.
- 7.2 In this regard some Councils have engaged in stress audits across all employees. Furthermore, some Councils have progressed the outcome of such audits through actions using HSE's Stress Management Standards as a starting point.

What is not yet clear is whether this type of approach has led to direct action across any Council.

- 7.3 While Councils do provide support for teachers who require counselling arising from the pressures of the post, the SNCT is clear that counselling services which are very welcome are not a solution and that workload pressures must be addressed.

## **8. Conclusion**

- 8.1 This report should be issued to all LNCTs with a requirement that each LNCT should develop a workload action plan. LNCTs should also develop mechanisms to keep the plan under review and to report the plan and review mechanism to the SNCT.

## **Appendix 1**

### **Teacher Workload – Key Issues**

#### Working Time Agreements

- (i) Centrally provided guidance
- (ii) Monitoring procedures
  - (a) all returns
  - (b) random sampling
  - (c) percentage of annual returns scrutinised
- (iii) Visiting – linked to monitoring or random visits
- (iv) School based evaluation
  - (a) time allowances
  - (b) areas of work
  - (c) adjustments required
  - (d) new priorities identified
- (v) New initiatives – use of CPD to tackle workload
- (vi) Surveys, questionnaires to inform LNCT

#### Collegiality

- (i) Conferences, events – joint working
- (ii) “badging” of materials – LNCT circulars, letters
- (iii) Ethos and leadership – role of Director
  - role of Education Convener
- (iv) Joint working – improvement plan – authority and school
- (v) Targeted work – planning
  - reporting
  - other working groups

#### Authority Support

- (i) Guaranteed management time
- (ii) Maintaining Support Staff
- (iii) Role of QIOs to support LNCT initiatives

#### Other Initiatives

- (i) Stress auditing and management
- (ii) Health and wellbeing
- (iii) Staff welfare