



**Sheffield
Hallam University**

SHARPENS YOUR THINKING

Developing the whole school workforce An evaluation of the Testbed programme

**Final Report
February 2008**

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Acknowledgments

Thanks to all of the schools for their wholehearted engagement with the task of evaluation and the warm hospitality extended to us during the visits to many different parts of the country.

It has not been possible within the confines of this report to do justice to all the exciting work that schools have undertaken on the Testbed project and the mass of data that we gathered. We wish to recognise here the commitment, energy and creativity that schools expended on the Testbed project and the openness with which they received us on our visits.

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Executive summary

The project

The nature of the workforce in schools in England has changed rapidly and is likely to continue to change in response to workforce reform and the Every Child Matters agenda. The purpose of the Testbed project was to explore how schools could best facilitate the training and development (T and D) of the whole school workforce within this context. It encouraged participating schools to develop systematic approaches to T and D to meet the needs of the whole school workforce. The project involved 45 schools in total: 15 primary schools, 20 secondary schools and 10 special schools and pupil referral units. Schools were largely free to decide their priorities, focus and the kinds of interventions that they introduced. The project period in schools commenced during the Spring Term of 2006 and continued through to the end of the Summer Term of 2007. In many cases the initiatives which were started during this period were planned to continue beyond the formal project termination date.

The evaluation

The Centre for Education and Inclusion Research (CEIR) at Sheffield Hallam University was engaged to evaluate schools approaches to whole school training and development under the Testbed project. Over the course of the project the evaluation team made three case study visits to each school, and collected data from interviews, documentation and other sources. This resulted in rich case reports for each school that formed the basis of the analysis.

The whole school workforce

There has been a substantial change in the proportions of staff groups in schools over the last decade with significant increases in the number of support staff compared with teachers and a much more diverse set of roles. Different groups of staff have different needs and expectations. These differences influenced how individuals and groups related to T and D. A key variable was how close an individual's role was to the core business of teaching and learning in the school. Individuals differed in their conceptions of their work and career and this meant there were often differences of attitude between staff to T and D *within* a staff group. Individual past experiences of learning partly determined staff attitudes to T and D with some support staff expressing anxiety about being seen to fail.

Project aims and strategies

The open guidance of the Testbed brief generated school projects with an extensive range of aims. Projects varied in whether they were built on earlier foundations or chose to begin something new; whether they targeted the whole or part of the school workforce; and whether the project implemented the same actions for all participants or planned different interventions for different staff groups. Many Testbed projects prioritised the T and D of teachers and TAs. Few of the Testbed schools articulated a rationale for the inclusion of all staff.

Plans aimed to have an effect at three levels:

- The culture of the school
- The schools organisation and management of T and D
- The development of individuals and groups

While it was useful for a school to focus initially on one of these levels, projects almost always involved aspects of the other levels.

Project interventions

The most common interventions were related to the organisation and management of T and D or the development of individuals and groups. The most frequent organisational interventions concerned extending performance review; clarifying roles and structures for managing T and D; making T and D more systematic; gathering data to identify needs; or auditing T and D activity. The most frequent developmental interventions were T and D activities for groups of staff or strategies to identify individual needs.

Less frequent interventions included actions to facilitate greater participation in existing activities by members of the wider workforce and arranging ways in which staff from different groups in the workforce could learn together. Interventions sometimes needed adaptation to be appropriate for different parts of the workforce.

Sometimes single interventions served a variety of purposes. Consequently, it is necessary to look beyond the label of an intervention to examine what was actually done, why and how. For example, performance review might be used in pursuit of cultural, managerial or developmental aims; and data gathering was sometimes aimed at establishing more efficient systems for recording and reporting, while in other cases it was used to identify the schools training needs, and in yet others it was to facilitate dialogue and sharing of knowledge.

Outcomes

Key outcomes across schools projects included:

Personalising CPD

- Effective whole school approaches involved tailoring activity to the differing needs of different staff groups and roles
- Approaches that gave staff in all groups the opportunity to reflect on their training and development led to a range of positive outcomes, including greater engagement with T and D and higher career aspirations
- Failure to consider the differing needs of staff groups and to provide access to appropriate T and D led to disengagement from T and D for those groups

Impact

- Interventions that increased T and D opportunities raised the profile and status of T and D, sometimes contributing to cultural change in the way T and D was viewed in the school

- Interventions that involved working more collaboratively often led to better relationships between staff groups, particularly those working directly with pupils
- Targeting specific staff groups with differentiated and specific T and D relevant to their role had a positive impact on staff's attitude to and engagement with T and D, particularly with midday supervisors in relation to T and D in behaviour management
- Developing individuals understanding of their own role had positive outcomes, including improved professional skills for support staff, role enhancement, and confidence to be independent, flexible and take responsibility for their own work and development

Factors influencing success

The major factors that facilitated project success were as follows:

Starting points

- The project was consistent with the schools priorities, and was viewed as an opportunity to move things forward in new ways
- There was a springboard of existing staff development activities which could be built upon

Leadership and Culture

The schools senior leadership had a vision of, and a commitment to, whole school T and D that was reflected in school policies. This was supported by a strong developmental culture, in which:

- People trusted the vision and purpose of the leadership
- People were open to change
- Risk-taking was accepted
- There was a general ethos of openness, participation and support
- Teamwork was widely observed across the school
- Motivation and morale were high

Those in leadership positions understood the complexity of perceptions and expectations across all the groups which made up the whole school workforce and responded positively and sensitively to these. Those leading the project:

- Were strongly committed to project success
- Had clearly understood roles and responsibilities
- Had the support of the school's senior leadership
- Had credibility with the wider staff
- Were seen as genuinely representing those staff groups with whom the project engaged.
- Strategies were adopted that did not simply invite the engagement of support staff groups but genuinely facilitated and encouraged it

School structures and processes

- The schools structures were used effectively, or modified, in ways which supported the aims of the project through, for example:
- Facilitating interaction between groups
- Enabling staff clearly to understand their role and receive support

- Providing developmental opportunities through role change or promotion.
- Effective communication processes were established which both communicated project purposes to the wider staff and enabled staff views to be fed into the decision-making process

Project planning

- There was sufficient planning and thinking time for all key players
- The project had a clear focus, but there was also understanding of its wider implications
- Those managing the project knew when and how to engage support

The major factors that hindered project success were as follows:

Starting points

- Competing priorities or initiatives

Leadership

- Misunderstanding, especially by senior staff and teachers, of the perceptions and feelings of particular groups of support staff, sometimes as a result of a 'teacher-dominated' culture
- The lack of a 'project champion' and/or ineffective or uninvolved senior school leadership

School structures and processes

- Structures that made internal communication difficult or left key staff groups uncertain of their role within the school
- Offering opportunities to engage in various activities without the supportive processes that made such engagement meaningful for those concerned

Project planning

- Insufficient consultation and communication leading to lack of buy-in by key staff groups
- A project that was too unfocused or which gave insufficient attention to the 'whole-school' aspect of the project
- Project support was not accessed, or was not used effectively

Conclusions and recommendations

- Schools should use the above findings as a resource to inform the establishment of whole-school training and development strategies
- In particular, schools should consider how they can develop means to promote staff thinking about their roles, and about their training and development

The benefits of so doing for individuals and the school include:

- Greater understanding of and engagement with T and D
- Higher career aspirations
- Cultural changes in the way T and D is viewed in the school
- Improved professional skills
- Role enhancement and development

- Confidence to be independent, flexible and to take responsibility for their own work and development
- Where a number of the conditions are not yet judged to be present, the findings of this study indicate benefits from prioritising establishment of these conditions

Success was the cumulative result of:

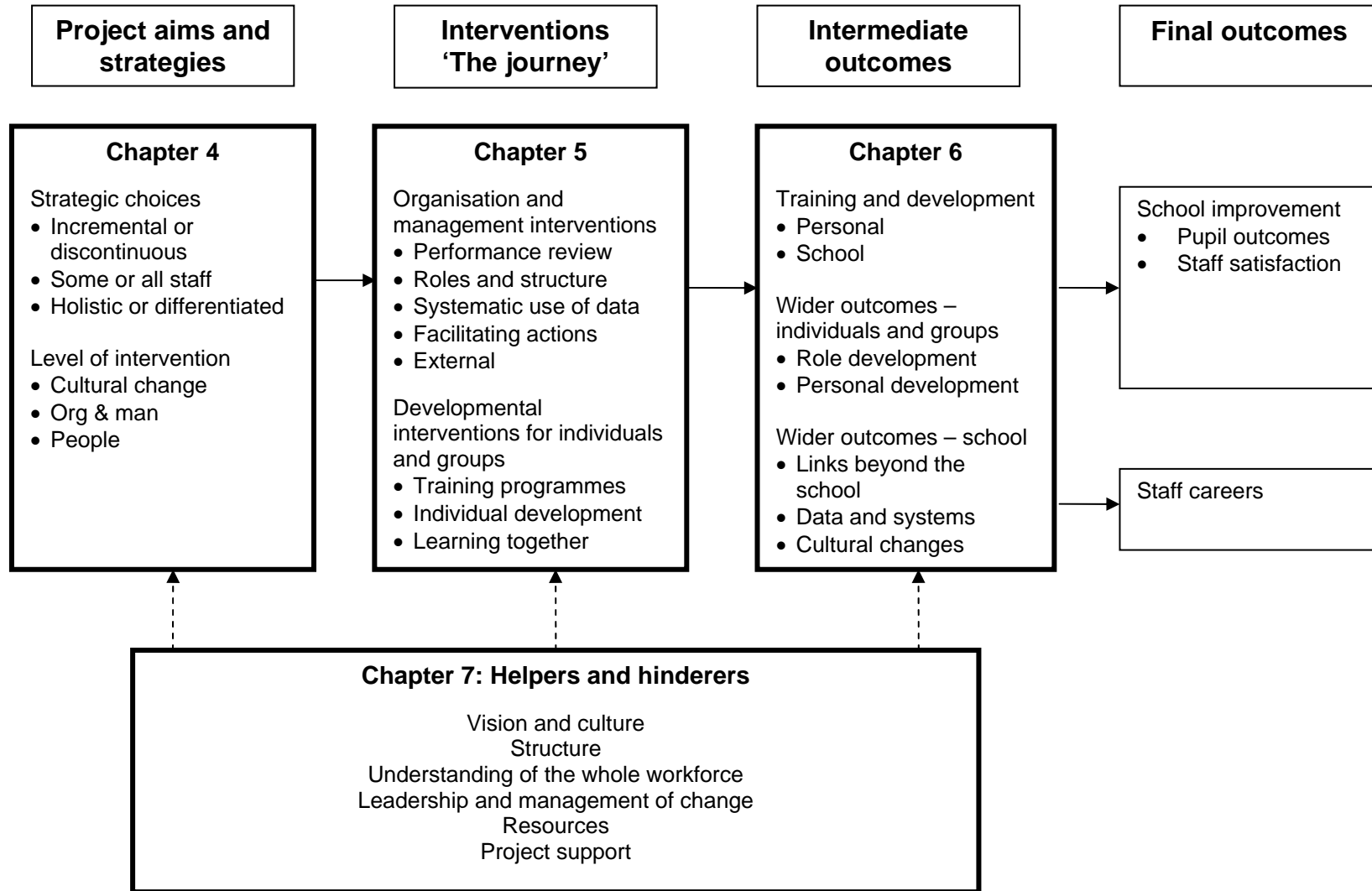
- Respectful relations between all staff groups
- Structural arrangements that expressed and facilitated that respect
- Acknowledgement (and the effective meeting of) real differences
- Competently implementing clear and manageable interventions in pursuit of well articulated goals
- A willingness to change in response to how things were found to be going

In developing strategies, schools need both to establish a clear vision of the purposes of development and training for the whole school workforce and to design and implement small, practical steps towards these purposes.

It is important for schools explicitly to consider the potential educational role and effects of all of the adults in the school, the beneficial effect on the community of the school through greater inclusion of all categories of staff and what is included in the duty of care as employers for employees.

The Testbed programme was an exciting initiative to explore the ways in which schools can address whole school training and development. The work of schools demonstrated many creative and effective ways in which progress can be made. Whether these features emerged from an effective culture or whether they constituted it does not matter, but acquiring these features of success, is likely to be the key to real progress and that is an ambitious and challenging task. What the Testbed projects showed was that it is an ambition that can be successful and is worth pursuing. The structure of the report is summarised in the diagram on the next page.

Figure i The Testbed project: overview



1 Introduction

1.1 Background

The nature of the workforce in schools in England is changing rapidly and will continue to change. This reflects a number of key policy thrusts. The most important of these are workforce reform and the Every Child Matters agenda.

Workforce reform, with its emphasis on viewing and managing the school workforce as a whole, has fundamental implications for the ways in which schools recruit, deploy, manage and develop all of their staff. The Education Act 2002 gave schools greater flexibility in the use of support staff in the classroom, and introduced a new framework for defining the roles of those with Qualified Teacher Status (QTS) and those without. These provisions are intended to provide safeguards over the role of QTS staff, while opening the way for schools to deploy their staff in ways that meet the aim of raising standards in the most cost-effective ways. This is seen as a significant step towards realising one of the eight priorities set out by the Secretary of State for Education, Charles Clarke in 2002 of *“Transforming the school workforce, and in particular freeing teachers to focus on their core professional role”*.

These concerns are complemented by the Every Child Matters agenda, through which the Government has set all those who have contact with children as part of their work the task of providing sufficient support for every child to be healthy and safe, to be able to enjoy and achieve, to make a positive contribution and to attain economic well-being. An important part of this agenda is to put in place an integrated framework of qualifications for all parts of the children and young people’s workforce. The sector skills councils are working to develop entry qualifications for each sector, to facilitate transfer across sectors and to build, through the qualifications structure, career paths for those who wish to take on more responsibility.

Schools play a vital role in this strategy. Not only are they directly responsible for developing children’s ability to achieve the ECM outcomes but they are also the only institutions that have contact with all children during the compulsory school years. This makes them, and the staff who work in them, a key focus for training and development. The Training and Development Agency (TDA) has responsibility for the training and development of the whole school workforce including support staff and continuing professional development (CPD) for serving teachers. Additionally, they have taken on responsibilities for supporting the remodelling of the school workforce to equip those who work in schools to deliver increasingly personalised learning and to work with other professionals providing extended children’s services, in part through the Extended Schools programme.

1.2 The project

The purpose of the Testbed project was to explore how schools could best facilitate the training and development of the whole school workforce. It encouraged and enabled participating schools to develop new approaches to training and

development to meet the needs of the whole school workforce within the context of workforce reform.

The project involved 45 schools: 15 primary schools, 20 secondary schools and 10 special schools and pupil referral units. Schools participating in the project were expected to develop and implement strategies to engage the whole school workforce in training and development. It was expected that there would be benefits at three levels:

- To the participating schools in terms of improved support and provision for training and development for their workforces
- To the wider school community through the dissemination of lessons learned and successful practice developed
- To the TDA and other national bodies in relation to their roles as change agents and policy makers

Within the broad purposes described above, schools were given a large degree of freedom concerning their priorities, focus and the kinds of interventions that they introduced. As will become clear in this report, the approaches taken by schools were varied in terms of the specific objectives they sought to achieve in their projects, the groups within the whole school workforce on which they focused and the approaches they took.

Schools were encouraged to establish 'Testbed teams', comprising appropriately representative groups of staff, to manage their projects and here, too, approaches varied widely. In order to ensure that lessons from the project would be more widely applicable, schools received no additional funding for their Testbed interventions. However, they were able to access funding to support activities associated with the management of the project and they had access to the following sources of advice:

- TDA staff members worked with the schools initially through 'co-design' meetings to help them frame their projects and to ensure that they were consistent with Testbed aims
- Local authority-based advisory staff, who were fully- or part-funded by the TDA for a range of work objectives, were available to provide advice and support at the schools request
- Three one-day Testbed conferences were organised at which themes relevant to the project were discussed and the experience of schools was shared
- An on-line forum was established to support networking between schools
- Staff from Sheffield Hallam University offered further advice to the schools on how they might evaluate their projects via three workshop sessions and email or telephone contact between visits. Schools differed in the degree to which they made use of this

The TDA project period in schools commenced during the Spring Term of 2006 and continued through to the end of the Summer Term of 2007, although in many cases the initiatives which were started during this period were planned by schools to continue beyond the formal project termination date.

The Centre for Education and Inclusion Research (CEIR) at Sheffield Hallam University was engaged to evaluate schools approaches to whole school training and development under the Testbed project and to provide guidance to schools and the

TDA on using project outcomes to inform policy and practice. This report attempts to capture the range of purposes, activities and experiences of the schools in the project and to use these both to enable a better understanding of some of the challenges posed by the idea of whole school T and D and also to provide indicators for schools in general and other interested parties of productive ways forward in this area.

1.3 The report

The primary audience for this report comprises those who lead and manage schools and those who have responsibility for establishing policy frameworks and supporting schools as they grapple with the challenges associated with a rapidly changing workforce. We have organised the report in a way which both reflects the nature of the data and the conclusions which we have reached. We have been mindful that readers may be particularly interested in the experiences of schools in the Testbed project, in the strategies and interventions that might be adopted by others and in those factors that are likely to make for success.

The structure of the report is as follows:

Chapter 2 briefly describes the evaluation methodology used in the study and also gives some details of the schools engaged in the project.

Chapter 3 considers the nature of the whole school workforce.

Chapters 4, 5 and 6 present data on the projects which schools undertook as part of the Testbed project. Chapter 4 explores the range of rationales and purposes that underpinned the projects in the schools; Chapter 5 describes and analyses the various activities (which we describe as ‘interventions’) in which the project schools engaged; and Chapter 6 describes and analyses the outcomes of the projects. Such a simple framework does not fully reflect the complexity of schools projects as they evolved on the ground. For example, outcomes often emerged in unexpected and complex ways. These three chapters together attempt to answer questions such as the following:

- In relation to aims: What kinds of purposes might schools pursue in relation to the development of the whole-school workforce? At which groups should initiatives be targeted? What assumptions underlie these various purposes? How might these purposes be embodied in overall strategies?
- In relation to actions: What kinds of things might schools do? Are some interventions more challenging than others? How might interventions be related to each other in a sensible way?
- In relation to outcomes: What are the potential outcomes of training and development for the whole school workforce? What is the relationship between individual, group and whole-school outcomes? Do some kinds of shorter-term outcomes lead to other more fundamental changes?

Chapter 7 explores those factors that helped and hindered the effective implementation of the projects and influenced their relative success in terms of outcomes. This is not a chapter of ‘recipes’. We do not believe that any complex change process is amenable to management by recipe, let alone a project that

comprised 45 schools each pursuing its own purposes in its own way. Rather this chapter attempts to draw from the experience of these schools to suggest a set of factors that should be considered carefully before any school embarks on a similar journey and the kinds of conditions that are most likely to make for success.

Finally, Chapter 8 draws some conclusions. First we summarise our overall argument based on the findings of our study, giving particular attention to the implications for schools. Secondly, we reflect further on what has emerged for us as a key question, namely: In what possible ways might schools conceive the 'whole workforce' and what are the implications of these for training and development strategy?

We have interspersed our argument with brief examples from project schools and have also included some longer examples in text boxes. These examples have been chosen variously because they represent practice in a number of schools and/or we feel that they will be of particular interest. All of these examples have been made anonymous to enable us to report fairly our own findings. The longer examples have been checked with the schools for accuracy.

A note on terminology

We have tried to maintain a consistent use of terms as follows:

The whole school workforce: All staff working at a school. This will include all employees as well as those employed by others where particular school functions have been outsourced.

The wider school workforce: All staff working at a school but *excluding* teachers.

Support staff: Members of the wider school workforce as defined above.

Training and development (T and D): All those processes used to enable members of the workforce to enhance their knowledge, understanding and skills in relation to their work. This includes those activities often termed continuing professional development in relation to teachers.

Specific groups of staff: Terminology used for staff in particular roles varies widely (see Table 3.1). We have tried to maintain a consistent use of terms. For example we have used the terms 'Teaching Assistant (TA)' and 'lunchtime supervisor' in place of the variety of terms used in particular schools for those undertaking these roles.

Performance management: Currently within schools the term 'performance management' is only applied formally to teachers in recognition of particular aspects of their conditions of service including the link between performance review and pay. Accordingly when referring to support staff, or to the whole school workforce, we have used the term 'performance review' rather than 'performance management'. It is important to note, however, that most of the schools, in discussing their projects, were not sensitised to this distinction and used the term 'performance management' in relation to their whole workforce.

2 The study and the schools

2.1 Key points of the chapter

- The data collection for the project consisted of interview, documentary and other data gathered over the course of the project, principally from 3 case study visits to each school. This resulted in rich case reports that formed the basis of the analysis
- The Testbed schools were a mix of primary, secondary, special schools and PRUs, with a good geographical spread, from across all the English regions
- Overall, the Testbed schools were performing better than the national average, based on external assessment results and Ofsted gradings

In this chapter we summarise how the project was initiated, our general method, our analytical approach and some of the contextual features of the Testbed schools.

2.2 The initiation of the project

TDA invited a randomly selected, geographically representative group of 300 secondary, primary and special schools and Pupil Referral Units to consider applying to be in the project. Those interested attended a briefing conference where further details were provided. It was important that any effects found were achievable within normal resources and not the result of initiative funding. The schools were required to undertake the projects within their existing budgets¹.

Following the briefing conference TDA confirmed the invitation with 40 schools. These schools represented a range of types of institution, geographical location, size and age phase. A further five schools were added at a later date². Members of TDA undertook a 'co-design visit' to each of the schools to draft a project plan. The characteristics of the final sample of 45 schools are presented and discussed in Section 2.5, below.

2.3 Summary of methods

We took a case study approach to the evaluation. We visited each school three times (as far as this was possible) and systematically gathered a range of qualitative and quantitative data to build up a rich picture of the work of each school.

In summary, our approach involved:

A scoping phase, in January and February 2006. This comprised a meeting with TDA to finalise the plans for the evaluation including access to schools, and the gathering

¹ Schools were paid to attend national events but interventions did not receive extra funding.

² These five were already involved in a curriculum development project with the Qualifications and Curriculum Agency (QCA) when they accepted an invitation from the TDA and QCA to be a set of schools overlapping both projects. In the rest of this report, we consider these schools in exactly the same way as the original 40.

of baseline data such as co-design visit notes, school action plans and Ofsted reports.

Initial visits, in Spring 2006. During this visit standardised, semi-structured interviews were conducted with the School Testbed Team, a local authority adviser where possible, and with the headteacher, where he/she was not part of the Testbed team. The aim of this phase was to enable us to make an initial assessment of the schools reasons for involvement, their objectives and the context and nature of the Testbed plan for each school in our analysis. In addition, workshops took place to support the school in setting up their own evaluation.

Second visits, in Autumn 2006. The purpose of these visits was to take stock of each school's project, to provide further support for schools' own evaluations and to collect interim data on interventions. A further interview took place with the Testbed team and focus meetings with key staff, including separate group discussions with teaching staff and groups of support staff that were most involved in the project.

Third visits were carried out in summer 2007 to gather outcome data, to identify the next stage (for example, whether schools planned to mainstream the project) and to gather further evidence on factors that influenced success.

2.4 Data gathering and analysis

The senior project team comprised ten experienced researchers and evaluators, with a range of expertise in school leadership, CPD research, consultancy and teaching. This group operated in smaller teams of three, taking responsibility for three roughly equivalent clusters of schools. These teams conducted the fieldwork visits and were responsible for providing first line advisory evaluation support to their schools. They also operated as a first stage analytical team through discussion, comparing of results and the identification of emerging issues and themes.

Using the data from the field visits and documentary analysis, the research team member compiled a Case Report from each visit and a final synthesised report. These were the main subject of the analysis. The reports were supplemented by other data about each school such as Ofsted reports, data from Edubase and School Self Evaluation Forms which were entered into a database creating profiles of the 45 schools. The reports and other data were analysed thematically, by a team of four senior researchers, including the three project directors.

2.5 The Testbed schools

The TDA and the research team sought to achieve a sample of schools that was sufficiently representative of all schools in England on a range of key characteristics. The characteristics of the project schools compared with all schools (in England) prior to the project, are presented below.

The 45 schools comprised 15 primary schools, 20 secondary schools, 6 special schools, and 4 PRUs. The sample included 33 community schools, 5 Foundation schools and 7 Voluntary aided schools. The schools represented a good geographical spread. Each was in a different local authority, spread across the English regions as noted in Table 2.1. The regional spread was close to that which would be expected from the actual numbers of schools in each region, although

London is over-represented and the South West and West Midlands are slightly under-represented.

Table 2.1: Expected and actual school numbers by region

	expected ^a	actual
East Midlands	4	5
East of England	5	6
London	5	8
North East	2	1
North West	7	7
South East	7	8
South West	5	3
West Midlands	5	3
Yorkshire & Humber	5	4

a Expected numbers derived from proportions of maintained schools in England by region.
Source: Statistical first release: Schools and pupils in England, January 2007 (DCSF)

Most recent Ofsted ratings were good for our schools. Of those last inspected before 2005 (when the new categories were introduced), there was one school rated as excellent, 10 as very good, 21 as good and one as satisfactory. Those inspected more recently included one school rated outstanding, 6 good and 3 satisfactory. Ratings were not available for the two remaining schools.

These findings indicate that the Testbed schools were performing at a level above that which might be expected from a random sample (see Table 2.2 below):

Table 2.2: Comparison of Ofsted ratings for Testbed schools and schools nationally (percentages)

	Excellent very good	Good	Satisfactory	Unsatisfactory / poor
National 04/05^a	21	48	26	5
Testbed Schools inspected pre05	33	63	3	0
	Outstanding	Good	Satisfactory	Inadequate
National 05/06^b	10	47	34	10
Testbed Schools inspected 05 onwards	10	60	30	0

a Figures derived from Ofsted Annual Report 04/05 b Figures taken from Ofsted Annual Report 05/06

Similarly, a comparison of KS2, KS3 and KS4 attainment data for 2005, as well as absence data, indicate that Testbed schools were performing better than the national average (see Table 2.3 below):

Table 2.3: Comparison of attainment and absence data for Testbed schools and schools nationally

	England Average 2005 ^a	Testbed Average 2005
Aggregate KS2 score	240	296
Aggregate KS3 score	217	298
% achieving 5 A*-C at KS4	57	64
% authorised absence	6.7	6.1
% unauthorised absence	1.3	1.0

a Figures taken from DfES Performance Tables 2005

3 Understanding the whole school workforce

3.1 Key points of the chapter

3.1.1 Findings

- There has been a substantial change in the proportions of staff groups in schools over the last decade
- There were two key dimensions which influenced the way staff groups related to T and D. These were the relationship of particular roles with the core business of the school and individuals' personal conceptions of role and career
- Different groups of staff have different needs and personal expectations. In addition there were often differences of attitude among staff within particular staff groups
- Many Testbed projects prioritised the T and D of teachers and TAs which were seen as close to the school's core business of teaching and learning. The T and D needs of other categories of staff were to some extent marginalised
- Few of the Testbed schools articulated a rationale for the inclusion of all groups of staff in their plans
- Sometimes it was negative past experiences of learning that determined staff attitudes to training and development

3.1.2 Conclusions/Recommendations

- It is important for schools explicitly to consider the potential educational role and effects of all of the adults in the school, the beneficial effect on the community of the school through greater inclusion of all categories of staff and what is included in the duty of care as employers for employees
- The differences in the way in which staff groups related to T and D and their different needs and personal expectations raise significant implications for strategy. For example, the readiness of groups to respond to opportunities, the planning of access to those opportunities and the setting of realistic objectives for different groups of staff
- External factors such as pay and conditions partly determine the kind of relationships that staff groups have to T and D. Schools have only limited control over these factors

3.2 Introduction

The categories of staff who work in English schools and their proportions relative to each other have changed radically over the last ten years³. While the number of primary teachers has increased by 2.7% and secondary teachers by 14.4% the number of teaching assistants in primary schools has grown by 152.5% and in secondary by 357.7%. For support staff other than Teaching Assistants the growth is

³ Blatchford et al 2006 and 2007

smaller but still substantial with increases of 69.3% in primary and 120.2% in secondary.

There are many different role titles and posts in schools. To simplify we have adopted a manageable set of eight categories of staff⁴. These are presented in the table below together with their relative proportions in the workforce and some of the roles and job titles that each category covers as illustration.

Table 3.1: The whole-school workforce

Staff Category	Proportion of school workforce⁵	Illustrative titles	
Staff with QTS	54%	Classroom Teacher (no extra responsibility) Advanced Skills Teacher Year Leader Deputy Headteachers	Classroom Teacher (with extra responsibility) Excellent Teacher Headteachers Assistant Headteachers
TA (or equivalent)	21%	HLTA TA (Primary) TA (Secondary) TA (Special)	Classroom support assistant Learning Support Assistant Nursery Nurse Therapist
Pupil welfare	1%	Connexions Adviser Home Liaison Officer Nurse	Education Welfare Officer Learning Mentor Welfare Assistant
Other pupil support	5%	Bilingual Support Language Assistant Lunchtime Supervisor Midday Assistant	Cover Supervisor Exam Invigilator Escort
Technicians and related staff	3%	Technology Technician Science Technician ICT Manager	ICT Technician Librarian
Facilities	6%	Cleaner Kitchen Manager	Cook
Administrative	7%	Administrator Finance Officer Secretary Data Manager Personal Assistant to HT	Bursar Office Manager Attendance Officer Examinations Officer
Site	3%	Caretaker	Premises Manager

There is a greater proportion of women than men in the school workforce. About 69% of teachers in all schools are female with a greater proportion in primary than in secondary. The great majority of support staff (around 89%) is female⁶. However there are differences between staff groups. For example caretakers are mostly male (79%). There are also differences between types of school - most support staff in primary and special schools are female (94% and 93% respectively) but only 80% of support staff in secondary schools. Men make up about 16% of all primary school teachers, compared with about 44% of all secondary school teachers.

⁴ The categories for support staff have been adapted from Blatchford et al (2007) *Deployment and Impact of Support Staff in Schools* IOE London DCSF.

⁵ The numbers of teachers and headteachers have been estimated from DCSF figures. The numbers of support staff are Blatchford et al's estimates.

⁶ Beeson et al (2003); Smith et al (2004); Blatchford et al (2006) and (2007)

3.3 Differing needs and expectations

Different groups of staff typically have different needs and personal expectations, different relationships with and expectations of the school and different objective and subjective circumstances. All these things affect their likely responses to training and development opportunities. This is illustrated by the following example from one of the primary schools.

Box 3.1 Staff attitudes to training and development in a junior and infant school

There was considerable variation in attitudes to training and development in different staff groups. For example, the midday supervisors, with one exception, were uncertain about the necessity of training for their group unless it was group training very closely connected to their role. They reported that they were encouraged and paid to attend training and development days but felt the topics were not really relevant for them, 'You know it was about the vision for the school and things like that.' The TAs were more convinced of the value of training and were anxious to get the training and development they needed to carry out their work effectively. However, a group of them felt quite firmly that increased skill and competence should be recognised through financial reward and some possibility of promotion. One person felt strongly that HTLA training is a matter of undertaking a lot of extra work 'to prove you could do what you were already doing' and then did not result in any financial reward. The two clerical staff thought their training needs were much more predictable than those of TAs or teachers and usually related to the introduction of new systems or processes. Their training tended to be provided by the LA and, although they were always invited to training events they saw themselves as on the margins of what was taking place. The caretaker's training was also largely managed by the LA. Both teachers and TAs felt that training and development should be driven by school rather than personal needs but at the same time wished that there was more room for the latter.

Respondents from schools in all sectors identified a range of factors which affected perceptions about training and development for various staff groups. Pay levels were often noted, as were the perceived lack of promotion prospects. Other factors included hours worked and the organisation of these and the need for administrators in smaller schools to be constantly available. However, there seemed to be two key dimensions which influenced how the relationship between individuals and groups were perceived by themselves and by others, namely the relationship of their roles to the teaching and learning mission of the school and individuals personal conceptions of role and career.

3.3.1 The relationship of particular roles with teaching and learning

The Testbed schools varied considerably as to which parts of the workforce were the focus of their projects. Table 3.2 summarises the main focus of the majority. A few projects brought in other staff incidentally or as a secondary thrust – most commonly these were administrative staff or midday supervisors. The majority of projects in primary schools, and around a third of those in secondary schools, focused primarily on teachers and/or TAs. Of the remaining schools the majority focused additionally on administrative staff (especially in secondary) or midday supervisors. In contrast,

the majority of special schools and PRUs had a wider focus, with a variety of other staff groups being brought in. Only nine schools, in our judgement, genuinely focused on the whole workforce.

This distribution of focus was further indicated by the composition of Testbed teams. All schools contained teachers on their teams, 21 included TAs and 17 (including 10 secondary schools) included administrative staff. However other staff groups were notably under-represented: 4 schools included technicians, 2 schools included midday supervisors, 1 a librarian and 1 a member of the premises staff.

Table 3.2: The focus of Testbed projects

	Teachers only	TAs only	Teachers and TAs	Teachers, TA and other	TAs and other	All
Primary (15)	1	2	5	2 (1 MS; 1 other pupil support)	2 (1MS; 1 admin)	3
Secondary (20)	6	0	1	8 (6 admin; 2 admin/site)	0	5
Special/PRU (10)	1	0	2	6 (2 admin; 1 welfare staff and MS; 1 technical; 1 admin and youth worker; 1 admin and MS)	0	1

MS = Midday supervisors

Figure 3.1: The staffing 'target'

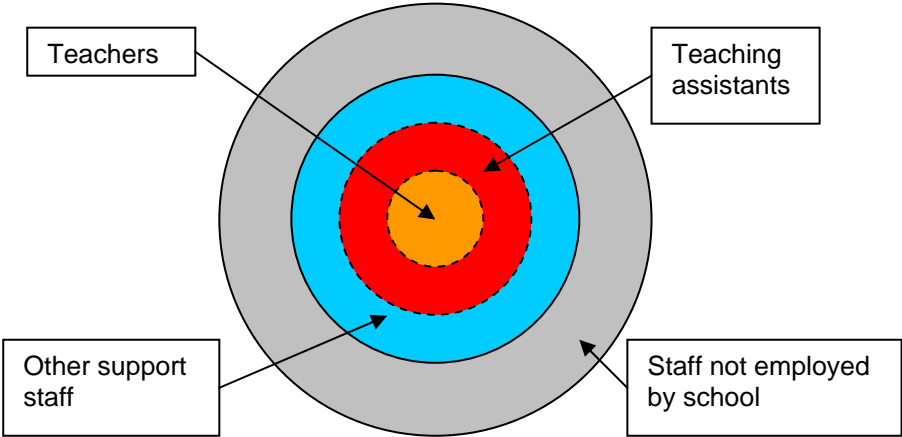


Figure 3.1 illustrates the way in which many schools prioritised for targeting staff groups because of their relationship to the schools core business of teaching and learning. The work of teachers was understandably seen to lie at the heart of the schools mission. Furthermore, teaching assistants were often seen as close to teachers because like them they work directly with children with a role that demands continuous concern for their learning and welfare. They take instructions directly from teachers and in order to work as an effective team a mutual understanding needs to be forged between the two groups. Responding to these needs and accommodating

to the increased number of TAs was seen as a priority. Other support staff were not prioritised while staff not employed by the school were almost never included.

Staff groups often had very different perceptions of their relationship to their work and to the school, and therefore to their training and development needs. Nevertheless, people in these staff groups were likely to have an important impact on children and parents in a variety of more subtle but important ways. There is therefore a strong rationale for including all staff groups as part of the educational community of the school and in a T and D strategy but this was not widely articulated in the Testbed schools.

3.3.2 Personal conceptions of role and career

Differences in perceptions did not just arise in relation to particular categories of staff. Often there were notable differences of attitude *within* particular staff groups. Other factors than role came into play, such as personal circumstances and career stage and ambition. These factors cut across staff groups and meant that general assumptions about, for example, the expectations of 'all TAs' or 'all midday supervisors' needed to be made with care. An example is given below from a primary school.

Box 3.2: Different perceptions among TAs

Individual TAs had rather different attitudes to their own continuing learning. For example, one aspired to be a qualified teacher and was enrolled on a part time QTS course. There was already a role model for this TA in the very successful literacy co-ordinator who had started out as a TA at the school, became a qualified teacher and was highly regarded. However, another had reluctantly become a TA and was clear about her further reluctance to be 'developed' if that meant having to do courses or more education. She did not aspire to become a teacher.

There was evidence from a number of schools that TAs and other support staff who did not wish to gain further qualifications, or other extensive forms of continuing development felt the need to defend their position usually on the grounds that they wanted to do their job better but did not aspire to advancement in a 'career' which some felt was, for them, an inappropriate concept.

Sometimes it was past experiences of learning that determined staff attitudes to training and development. A common anxiety that arose among support staff was the fear of being seen to fail by their colleagues. This sometimes arose because of negative experiences of school as a child, or the length of time since they had engaged in formal study and particularly assessment or exams. These colleagues, shied away from career progression because re-entering education, even to do short training courses, risked exposing them once again to the fear of failure. Even where career progression was aspired to, personal circumstances and preferences created tensions. For example, many support staff had strong attachment to the school and did not wish to work anywhere else, yet career progression required wider experience. This contrasted markedly with the position of teachers, where movement between schools was a more normal part of the process

of career progression. In a number of cases senior staff and teachers stated that the consequent lack of opportunities for career progression without moving school made it important for staff to see development as something that occurs 'outwards' (i.e. through role extension or enrichment) rather than 'upwards' (i.e. through career progression), but it was not always easy for the staff concerned to see this.

3.4 A missing category of staff

Attention is not given in this report to the range of professionals who visit schools and who share responsibility for children's welfare or education. These include governors, volunteer workers and employees of other agencies who engage with the school and its pupils within the multi-agency context of the Every Child Matters agenda for example police officers, members of the Youth Offending Teams, social workers, Connexions personal advisers and educational psychologists. None of the schools in this Testbed project focused on these groups. Their training and development was not seen primarily as the schools responsibility. These staff are not employed or line managed by the school and individual schools are not usually their prime workplace and they visit many schools as part of their work. However they are a vital part of the integrated service offered to children and young people and, as such, a part of the community of the school as experienced by the pupils. It is therefore arguable that their T and D should be co-ordinated with the T and D strategy of the school.

3.5 Conclusions and recommendations

The decision by many Testbed schools to focus on teachers and TAs was often justified by what would have the most direct benefit for children. The following alternative rationales for targeting different groups were heard very infrequently and should be more fully considered by schools when considering targeting:

- The indirect educational impact of adults i.e. the educational role and effects of all of the adults in the school
- The beneficial effect on the community of the school through greater inclusion of all categories of staff
- The duty of care as employers for employees

The different attitudes to work and T and D raise significant implications for strategy. Schools might consider how far those who are less motivated towards training and development should be pushed, and towards what? And, conversely, how the school can address the issue of career aspirations where other factors make these difficult to meet? External factors such as pay and conditions partly determine the kind of relationships that staff groups have to T and D but these are largely determined at national level and are - usually - effectively beyond the control of individual schools.

4 Project aims and strategies

4.1 Key points of the chapter

- The open guidance of the Testbed brief generated school projects with an extensive range of aims (see annex X)
- Projects varied in whether they were incremental or totally new; whether they targeted the whole or part of the school workforce; whether the project aimed for similar and inter-related developments across all involved groups, or made different provision for different groups
- Schools that achieved significant implementation across a wider group than classroom-related staff had projects that involved a number of inter-related interventions which were intended to address whole-school issues in ways which brought people together and generated interaction: or had as their emphasis the aim of drawing all, or most, staff groups into the ways in which the school was structured and managed; or implemented a number of innovations which met the particular needs of key groups from the wider school workforce
- Project plans aimed to have an effect at different levels: that of the culture of the school, that of its organisation and management, and that of individuals and groups
- While it was useful for a school to focus initially at one of these levels it almost always involved aspects of the other levels
- The attempt to effect changes in the school often led to greater understanding and sometimes a rethinking of original aims and assumptions

4.2 Introduction

The T and D plans that project schools produced were expected to embody significant additions to, or redirection of, already existing strategies or activities to make their overall approach to T and D more effective and comprehensive. This chapter describes and discusses what schools set out to achieve and identifies some significant features of the process of setting broad rationales and purposes.

4.3 Strategic choices made by schools

The schools plans and the visits to the schools showed that schools had made decisions in relation to a range of possibilities including the following:

- Whether the project should be incremental, extending or building upon existing developments or whether it should establish new practices or provision in an area where little had previously been done
- Whether all workforce groups should be addressed at the same time, or a phased approach adopted with some groups addressed first
- If only part of the workforce was to be the focus, which groups of the workforce should receive priority?
- Whether the project should aim for similar and inter-related developments across all involved groups, or make different provision for different groups

Among the Testbed schools all of these approaches were observed.

We judged that 24 of the project schools achieved significant implementation across a wider group than classroom-related staff. They roughly fall into three groups. In the first group (called Organic in Table 4.1) were those schools that implemented a number of inter-related interventions intended to address whole-school issues in ways which brought people together and generated interaction. They tended to emphasise, either explicitly or implicitly, developments in school culture or relationships and changes to processes. Those in the second group (called Systems in the Table) tended to have as their emphasis the aim of drawing all, or most, staff groups into the ways in which the school was structured and managed. Most of these projects centred on the extension of performance review systems and the development of other related procedures to wider groups of staff. The schools in the final group (Strands in the Table) implemented a number of innovations which were not, or were only very loosely, connected but which met particular needs. Often these projects identified key groups from the wider school workforce and implemented specific initiatives to meet each of their needs separately.

Table 4.1: Types of whole-school project

	<i>Organic</i>	<i>Systems</i>	<i>Strands</i>
<i>Primary</i>	5	-	-
<i>Secondary</i>	4	4	4
<i>Special</i>	2	2	3
<i>Total</i>	11	6	7

None of these approaches proved to be preferable to others in what they achieved. The key issue was not what was done, but the way it was done and how it related to the broader strategy and culture of the school. However, within each of these categories we judged that some schools were particularly successful in addressing the needs of all, or the majority of, workforce groups. We particularly draw on these for the extended examples in the chapters which follow.

4.4 Levels at which schools decided to intervene

Table 4.2 encapsulates the range of purposes that schools were pursuing. The different kinds of project focus can be seen as different levels at which the school wished to intervene with Culture being the most general level, incorporating all aspects of the institution, while Development of People is the most specific, focusing on identified individuals or groups. Each level therefore implies a significant difference in schools thinking about the project.

Table 4.2: Broad project purposes

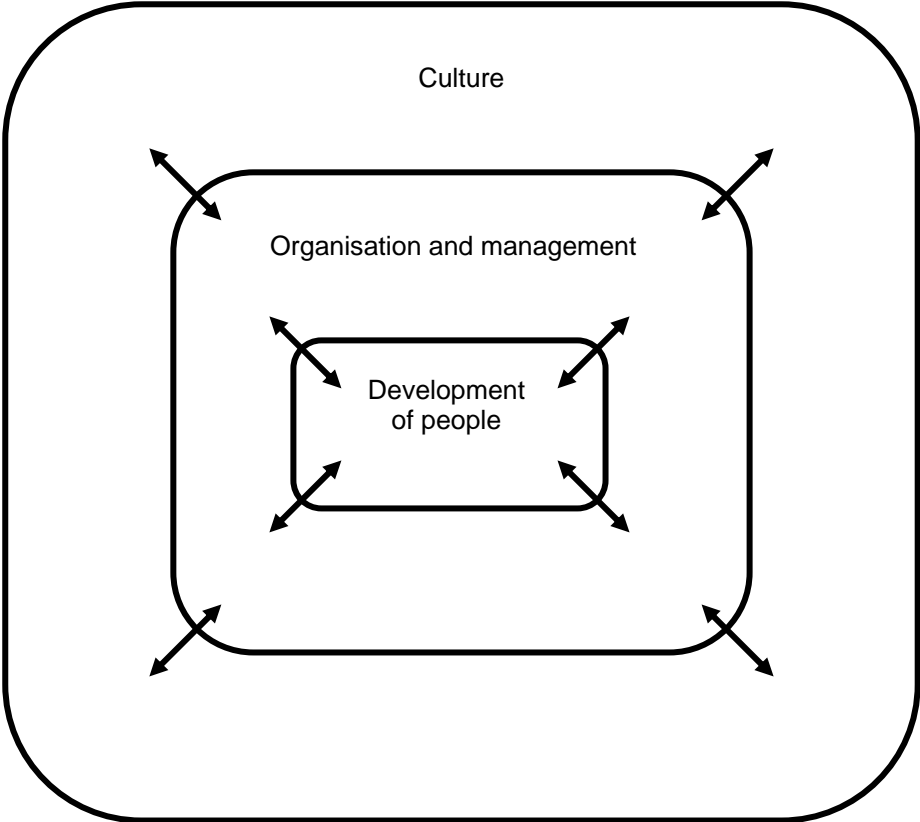
Project focus	Area of activity	Underlying assumptions about the 'problem' being addressed
Culture	To change values, beliefs, behaviours and relationships in relation to the whole school workforce and/or T and D.	Beliefs and attitudes about the whole school workforce or about T and D need to be changed if our vision for the school is to be realised.
Organisation and management	To enhance the efficiency and effectiveness with which T and D operates, either specifically or in relation to the wider management of the school	We do not organise and manage T and D as effectively or efficiently as we might. Consequently we do not achieve as much as we might.
Development of people	To meet the specific T and D needs of individuals and groups	Our provision is lacking. We need to provide a wider range of types of T and D or enable access to it for a wider range of staff.

Different projects had very different starting points. Some were very specific in their focus: for example, the introduction of particular tools such as portfolios or courses to train or develop particular staff groups in particular ways. Others were clearly focused on developing aspects of the management and administration of T and D or of the broader systems in which this was embedded. Some of these wished to improve the effectiveness of particular systems or procedures (for example, needs analysis or performance review); others wanted to broaden their focus, typically from teachers to the other staff groups.

However, while a particular project might be focused initially at one of these levels it was rarely contained there. For example, a specific intervention, such as the introduction of portfolios, soon raised management issues concerned with its implementation such as how exactly it was to be administered and what its relationship should be with the schools performance review system. Issues also often arose, in an iterative way, about the purposes of portfolios that implied a potential for their use to contribute to some form of cultural change. Consequently schools that had not thought of their projects specifically in terms of cultural change often realised that they had cultural implications. Figure 4.1 tries to capture this inter-connectedness of levels. The distinction into levels is therefore a convenient description of the reality of school life. The process of making a plan with objectives, identifying ways of achieving those objectives (interventions), the framing of success criteria and the experience of implementing the interventions often led to a greater awareness of underlying assumptions and provoked a change to the original aims and objectives. The greater understanding and knowledge resulting from this iteration and feedback from practice, the experience of the journey, was a fruitful result of the project.

In what follows we identify individual categories of aims but most schools identified three or four distinct aims in their plans. Six schools appeared very focused in their explicit purposes, focusing only on one aim from one category of purposes, and at the other extreme eight schools identified as many as nine aims from three or more categories.

Figure 4.1 Focus of T and D purposes



4.5 Varieties of cultural aims

There were three foci of improvement for schools that wanted their projects to address issues of culture or cultural change through challenging particular values and beliefs. Table 4.3 outlines these and gives examples of the kinds of objectives that schools sought to achieve.

Table 4.3: Cultural objectives

Focus	Examples of objectives
Changing how various parts of the school's workforce were seen by themselves and others.	<ul style="list-style-type: none"> • Establishing a perception of parity, equity and value and clarity about each person's/each role's contribution • Better integrating different staff groups into the school community and making all parts of the community feel that they mattered • Raising the status of specific staff groups.
Changing how members of the workforce understood what T and D might comprise.	<ul style="list-style-type: none"> • Broadening views of what counts as T and D e.g. moving away from traditional conceptions of T and D as courses • Shifting conceptions of T and D as something that takes place out of school towards creative ways of bringing activities in-house including drawing on the school's own resources as well as external support • Developing a genuine belief that T and D is for everybody and that equity of access needs to be addressed.
Changing how individuals and groups viewed, and behaved towards, T and D.	<ul style="list-style-type: none"> • Encouraging all members of the workforce to take ownership or responsibility for their own T and D (the 'empowerment' assumption) • Encouraging collaborative/collegial/sharing activities as an important dimension of the work of the school and as a key aspect of T and D (the 'learning school' assumption) • Encouraging staff to be reflective and evaluative in relation to their own practice and actively to consider the impact of T and D on their own work (the 'reflective practitioner' assumption).

4.5.1 Varieties of aims related to organisation and management

We identified two kinds of aims related to organisation and management. Table 4.4 outlines these and gives examples of the range of objectives that they embodied.

Table 4.4: Objectives relating to organisation, leadership and management

Focus	Examples of objectives
The effective management of T and D	<ul style="list-style-type: none"> • Making the management of T and D more strategic, e.g. developing T and D plans that were more tightly linked to the school development plan • Revising the way T and D is managed, e.g. revising the performance review system to engage all staff and / or ensure that T and D concerns were addressed more robustly as part of the process • Enhancing specific aspects of the T and D management cycle, e.g. ensuring that needs were identified more effectively, or that the outcomes of T and D activities were better evaluated.
Enhancing the schools capacity to provide effective T and D for its staff.	<ul style="list-style-type: none"> • Fully utilising the internal resources of the school for T and D • Developing staff's capacity to deliver T and D • Enhancing the schools capacity to draw on external resources through outreach and networking activities.

4.5.2 Varieties of aims relating to the development of people

We identified two kinds of aim relating to the development of people. Table 4.5 outlines these and gives examples of the range of purposes that they embodied.

Table 4.5: Objectives relating to the development of people

Focus	Examples of objectives
Enhancing people's performance and/or effective contribution	<ul style="list-style-type: none">• Enhancing role clarity through developing people's understanding of the ways in which they can best contribute to the school's purposes• Enabling individuals to grow into new roles• Raising their existing skill levels and developing new skills
Enhancing people's perceptions of how their T and D might relate to career possibilities, facilitating career progress and personal development.	<ul style="list-style-type: none">• Enhancing staff conceptions of their personal development in relation to their career routes• Enabling individuals to explore and pursue career possibilities• Enabling staff to plan transition from work to retirement.

5 Interventions

5.1 Key points of the chapter

- The most common interventions were related to the organisation and management of T and D or the development of individuals and groups
- The most frequent organisational interventions concerned extending performance review, clarifying roles and structures for managing T and D, making T and D more systematic, gathering data to identify needs or auditing T and D activity
- The most frequent developmental interventions were T and D activities for groups of staff or strategies to identify individual needs
- Some interventions were less frequent but of interest. These included actions to facilitate participation in existing activities by members of the wider workforce and arranging ways in which staff from different groups in the workforce could learn together
- Interventions sometimes needed adaptation to be appropriate for different groups of the workforce
- Sometimes single interventions served a variety of purposes. For example when performance review was used in pursuit of cultural, managerial or developmental aims
- To understand the interventions it is necessary to look beyond the broad label and to examine what was actually done and how. For instance data gathering in some cases was aimed at establishing more efficient systems for recording and reporting, while in others it was for identifying needs the school had for training, and in yet others it was to facilitate dialogue and sharing of knowledge

5.2 Introduction

This chapter explains the specific actions Testbed schools took to implement their plans and achieve the objectives of their projects. We report briefly on features of all such interventions across all schools, then concentrate upon the most common activities designed to develop T and D. These are illustrated from selected examples across the range of school types. As well as providing brief examples to illustrate the range of interventions we include three longer cases. These show how interventions developed during their projects, and indicate how they were related to outcomes and factors influencing success, matters which are discussed in detail in chapters 6 and 7 respectively. Those two chapters contain further cases highlighted in boxes illustrating the sorts of actions taken by schools. Several successful projects managed a range of interventions systematically. Other less ambitious projects used fewer interventions effectively. Where plans initially focused upon one of the three levels outlined in chapter 4 (culture of the school, organisation and management, people) it often became apparent during a project that there were implications for the other levels.

5.2.1 An overview of all interventions used by projects

There were two main types of interventions:

- Activities to improve the organisation and management of T and D
- Activities to develop individuals or groups

We examine examples of those in sections 5.3 and 5.4 below.

The sorts of interventions which schools introduced were classified as shown in tables 5.1 and 5.2. These give the numbers of schools using each; the majority of projects used two or more such interventions. A small minority used other activities that did not fit those categories. Although their incidence was low they are still of interest and included: introducing pupil learning mentors/pupil coaching; curriculum development; staff training for specific school projects; and career planning frameworks.

Table 5.1: Interventions related to the organisation and management of T and D

<i>Reviewing performance:</i> extending or introducing performance review.	17
<i>Changing/clarifying roles and structure:</i> e.g. making clear who has responsibility for T and D management; clarifying job descriptions for support staff; succession planning; restructuring the organisation.	16
<i>Planning/managing CPD:</i> actions to make CPD more explicit, systematic or strategic; developing training plans; enhancing internal capacity for T and D.	14
<i>Data gathering and needs assessment:</i> e.g. developing databases, auditing, identifying needs; surveying staff	11
<i>Developing evaluation:</i> trialling or enhancing approaches to evaluation of CPD.	5
<i>Actions to facilitate participation:</i> e.g., organisational adjustments to enable inclusion of whole school workforce in activities; organising T and D teams around the ECM agenda.	6
<i>External:</i> outreach to other schools; work with external networks or individuals.	3

Table 5.2: Interventions related to the development of individuals or groups

<i>Courses (internal & external):</i> developing specific T and D programmes, induction programmes; external courses.	27
<i>Individual development:</i> e.g. personal development planning or portfolios; peer observation; coaching; supporting reflection.	10
<i>Learning together:</i> e.g. systems/models for sharing learning within the school, action learning sets, reading groups.	9

5.2.2 Changes over the year

Many schools focused on fewer interventions than had been anticipated in their earlier planning. For instance one comprehensive school which was aiming for cultural changes that would better integrate the different staff groups in the school community began with a number of themes, but as the project progressed it was narrowed down to focus on two specific interventions: developing portfolios for all staff and the use of recording systems to monitor T and D so it could be managed more effectively. A primary school which had six strands in its project was unable to progress all six in the time: the development of portfolios was subject to considerable delays and an Ofsted inspection halfway through the year put their Testbed project on the 'back burner'. Less commonly an opportunity or new need caused schools to extend their project interventions during the year, for example where a new group of staff joined the workforce and there was a need to accommodate them in the organisation and culture. Several projects initiated longer term developments or postponed work to the following year. In some cases a change of emphasis or deferral was necessary because of altered conditions in the school or outside. Such changes also followed from a clearer articulation of aims and objectives as well as altered priorities.

5.3 Interventions related to organisation and management

5.3.1 Performance review

In their Testbed plans many schools included interventions related to performance review. For some it was an opportunity to consolidate or extend review procedures, for others it was seen as a vehicle for more radical developments or for establishing a common culture. In one large comprehensive school, performance review for support staff was one of two main interventions intended to promote greater equity in the way that support staff and teaching staff were treated and to provide support staff with opportunities to tell someone about things they were doing well and to receive feedback on areas for development. At the end of the year a number of examples were given of individuals in the school who had been involved in the process who had really been helped in their development.

A few schools concentrated on teachers, by intent or default. In some cases this was a priority because performance management for teachers was not yet well established and so Testbed was taken as an opportunity to consolidate it with them. Around one quarter of schools in the project extended performance review to support staff: most often in the first instance this was to TAs; in some cases to other groups and in a few across the wider workforce.

Some specific activities and approaches employed are illustrated below. These examples also indicate some factors which helped or hindered the development of review processes across staff groups. As well as examining what was done it is important to consider how various staff groups and individuals perceived performance review.

One small primary school, along with other actions they took to support T and D for TAs, ensured that each had a review interview to discuss their individual needs, and in preparation for that provided guidance on compiling a portfolio. The TAs valued this process and their portfolios. In another larger primary school the extension of performance review to the TAs was closely linked to the need to enhance classroom observation and assessment of pupils; they had previously reviewed how TAs and teachers were paired. Box 5.1 illustrates how a school extended performance review to the TAs, and indicates some challenges that may need to be managed by schools.

Box 5.1: One special schools progress in extending performance review to TAs

In a special school where there had been a large increase in support staff in recent years the Testbed team used a questionnaire to survey how a small group of TAs felt they were perceived in the school and to ask what they wanted in terms of performance review and training. The senior managers were surprised to find that TAs didn't feel valued. The team started a pilot review scheme with fifteen teaching assistants who were enthusiastic and who represented different TA roles. The TAs wanted teachers to do their review and each chose a teacher as their mentor. However there was a mismatch of expectations between the TAs and the Testbed team. The TAs felt that they were prevented from achieving their targets by lack of time and cover, refusal of funding for external courses, and a lack of awareness by teachers of what they were trying to do. The Testbed team members were surprised that the TAs didn't take ownership of their targets and expected someone else to organise their development. On reflection the team recognised that they were asking for a culture shift as TAs were fairly strongly directed in their work, and previous training had been directive. Although the school had made limited progress with this strand of their project the experience informed the School Development Plan for the next year.

A systematic approach was exemplified in a PRU which took the following steps to develop performance review and engage the staff in that process. The Testbed team first researched models of review, then developed systems and documentation which were agreed with managers; next they got comments from staff, presented their model at a training day, and then trained a wide range of people (including administrators, TAs, teachers and managers) to implement it. As a result everyone was engaged and effective systems were established.

A whole school approach does not necessarily imply doing the same with all groups or expecting similar progress. The varied responses that different groups of the workforce may have to interventions was illustrated in a primary school which had a large increase in support staff who then outnumbered the teachers. A review format for Learning Support Assistants was agreed and trialled, and links to professional learning activities were put in place, with training plans and timetables. A format for administrative officers review was trialled and completed. That for LTAs (lunchtime assistants) was slower - after resistance to the process from some LTAs the format was reduced and it went ahead with the more enthusiastic of the LTAs.

Even when the initial response was positive and the climate favourable the establishment of such systems sometimes took time to bed in. Thus a secondary school piloted three models of performance review interviews for support staff, then introduced reviews which were very positively received. But despite the enthusiasm

for the approach progress was somewhat slower than anticipated, partly because more time was needed in order to implement the targets with training to support them. On reflection the coordinator decided to start the next round of reviews with all support staff earlier in the following year.

An extended example of a school implementing performance review is given in Box 5.2.

Box 5.2: A whole school approach with attention to different groups

At the time of the first visit, a large comprehensive school had been working with the supporting officer from the Local Authority and another school to develop a model for linking the School Improvement Plan, Performance Review and T and D for the whole workforce. The model aligned with the extensive work the school had already done on self-evaluation. It was used to develop revised guidance for Personal Development Review (as they termed it) for all staff to use in 2006/7. Slightly different versions were created for teachers and support staff to take account of statutory requirements for teachers. The first whole school training on the new model was held in summer 2006 where teachers and support staff were addressed separately because of differences in statutory guidelines. The whole idea of linking performance review to staff development was explained to staff, together with the intention to have a professional development review cycle for all staff in place by autumn 2007.

Teams were the main vehicle for implementing the project across the whole school, so project development went hand in hand with establishing teams. Team leaders were supported by the SLT in taking the project through the normal line management processes and meeting structures in the school. Middle leaders' training needs were identified and training provided. In March 2007 all staff were briefed on the new review guidelines and the message reinforced that the school did not want it to detract from the professional learning that was taking place. The school waited for the new performance management guidelines for teachers before deciding on how to take the developments forward the following year. Some of the specific interventions at team level illustrated the different rates of implementation and the different conditions:

Learning mentors were the first support staff group to use the new model. At the time of the first visit they had already established performance review and a CPD programme, which was continued through the project.

Administrative team A new PA to the Headteacher was appointed to lead the school office team. The intention was to bring in performance review in 2006/07 but this didn't happen because of staff shortages which required the team leader to cover two jobs. Some progress was made with team members completing the personal development self-review. Performance review was identified as a key priority for 2007/08.

Learning Resource Centre Over the duration of the project the LRC team went through the first cycle of review and established regular half-termly team CPD meetings. The school provided cover in the LRC for them to meet for an hour after school.

This case is cited at some length because it illustrates a number of positive points:

- Building upon existing work and the schools values
- Support from senior management
- Integration of the activity within the organisation of the school and links to other processes

- Systematic implementation of plans (in this case through a team structure in a large school)
- A differentiated approach to staff groups within an overall strategy in order to foster the development of the whole workforce
- Recognition that even with such a comprehensive approach staff groups and individuals will develop at different rates

5.3.2 Roles, structures and management of T and D

As Table 5.1 indicates many projects featured organisational interventions concerned with roles, structures and the management of T and D. One big comprehensive school, with an ambitious project that seemed to have worked well through a strand structure and an effective Testbed team, included some clarification of roles, lines of management and job descriptions for support staff. In a few cases there was more substantial re-organisation and definition of new roles, clarifying the job descriptions and responsibilities of staff. One primary school, made various structural changes early in the year. It linked TAs and Nursery Nurses to year groups with teachers as line managers, restructured the administration team and appointed senior teachers with new responsibilities. These changes supported the overall objectives of their project, which developed slowly at first but appeared to make major advances by the end of the year toward more systematic, explicit and equitable T and D.

In order to make T and D more systematic, six projects developed individual or departmental training plans. For example in a secondary school the first stage was to produce a proforma for training plans, making explicit the schools commitment to training and ensuring the training had a particular focus. The aim was to produce a common format for teaching and support staff. The next stage was to provide training in areas identified as needed. Using internal staff, a needs-led training programme was developed and training sessions took place after school which were attended on a voluntary basis. A number of these were led by staff members. As the project developed, whole school training days were used to address elements of the School Improvement Plan.

Three other schools explicitly worked on enhancing their internal capacity for training. For example one used their recently appointed business manager to develop T and D with the administrative team, and also raised the profile of an existing CPD reading group as a learning resource. Many schools acknowledged early in their projects that external courses and providers were not the main resource for their T and D; they drew more upon the expertise within their school community and in some cases deliberately sought to share it with the wider community of schools. This was particularly evident where special schools or PRUs had particular expertise in, for example, behaviour management.

5.3.3 Systematic use of data

Around one third of schools had planned some form of intervention relating to data gathering and needs assessment. In a few cases this was only a minor part of a larger project (such as two cases above where it fed into a co-ordinated approach to school plans, individual performance review and CDP) or was the preliminary phase for planning a needs-related training programme.

The most obvious starting point, often cited in initial plans and meetings, was to seek views of staff about T and D and/or to establish a baseline of current activities and perceived needs. Although that might be seen as a necessary and neutral process it sometimes had unintended consequences. Some of these consequences were welcome, for example where it enabled staff to voice their opinions and make their needs known, but some were less helpful, if the data gathering was perceived as surveillance or was unevenly implemented.

One example of a thorough and positive approach was that taken by the team in a large comprehensive school which conducted a review of the qualifications, aspirations and personally perceived needs of each individual member of the whole workforce, and surveyed perceptions of T and D using a questionnaire designed to gauge a sense of inclusion and satisfaction about equity and inclusion.

Questionnaires were adopted, adapted or created in several schools. Technical problems and roll out delayed some of the auditing planned by schools. Although it seemed sensible to take account of existing local or national systems these were not always judged to be appropriate or effective: for example, as in several schools, the support staff throughout one large comprehensive school took part in an on-line development review but the benefits were unclear and they said that a lot of the questions were irrelevant.

In some projects the purpose for data gathering was more about monitoring T and D activity and seeking to evaluate its effects. A school established an on-line document which staff added to whenever they took part in a CPD activity - they described the activity, the quality of the experience, any skills or expertise they developed and the impact on practice. The Testbed team organised drop in sessions to support the staff and felt that people were starting to get involved, though staff engagement was still patchy. Data was gathered on: the balance of CPD; who had undertaken CPD; what types of CPD and the topics they had covered. The first analysis of the data showed that there was a good spread of applications across teachers and support staff, and that links to the School Improvement Plan were well developed. Four other schools had evaluation activities in their project but limited progress was made with these.

5.3.4 Actions that facilitated participation by the wider workforce

In this category we include actions such as inviting staff to meetings or events which they had not previously taken part in, adjusting agendas and hours and procedures. Although these were minor interventions and were highlighted in just a handful of plans they were significant for engaging the wider workforce. They had symbolic as well as practical consequences.

For example, a secondary school made a decision to set aside dedicated time for CPD activity by closing early once a fortnight. The headteacher strongly believed that this was essential and staff should not be “expected” to attend such activities on top of other work commitments. All focus groups at the school said that having regular, compulsory, dedicated time which became a routine was essential to the success of their project. At another school all staff were invited to staff development days and the TAs in particular were likely to attend. There were discussions about the value of inviting support staff to the early part of such meetings and enabling them to put issues of concern to them on the agenda. There were also twilight sessions and the

headteacher introduced a process in which the issues covered were repeated the following morning for support staff so that they were not obliged to attend outside their contracted hours.

5.3.5 External

Five schools had identified in their plans more external involvement in which they could offer their own expertise. This was seen not only as a contribution to the wider educational community but also as a strategy for enhancing their own T and D through participating in networks and through the individual development of their staff who were working with other schools. Although this fell most naturally to special schools and PRUs which were engaged in outreach and support, there were secondary and primary schools which featured it. For instance a small rural primary school developed a number of outreach activities by the head, deputy and staff; training on raising attainment was delivered by teachers from the school to other networked primary schools and their HLTA worked on inducting new support staff across the Local Authority.

5.4 Developmental activities

5.4.1 Training programmes

Nearly two thirds of projects featured specific training events, either provided internally, using external support and courses or by visits. In some cases they were targeted at selected groups. In other projects the plans suggested they were to be for the whole staff or the wider workforce, but in many cases not every group was actually engaged during the project. The groups in the wider workforce that were most often targeted were midday supervisors and above all TAs. At the risk of oversimplifying the picture, these two illustrated contrasting types of activity – one served a more specific immediate function in the life of the school, the other provided professional development with longer term benefits to the school and the individual. Thus short, specific training programmes were laid on in some schools for the midday supervisors focusing particularly on pupils behaviour, often with impact that was evident in the short term. On the other hand mapping routes and accessing courses leading to qualifications for the wider workforce was done mainly for TAs (who also had other forms of T and D – for example through classroom observation or team-building activities). There were projects which undertook both of these types of intervention. For instance, one primary school which provided training in good quality play supervision and behaviour management for midday supervisors during the year had also, from the start, been running career pathway mapping workshops for TAs led by the officer from the Local Authority who was supporting their workforce development.

Another primary school, with over 70 staff, combined those sorts of activities and others in their project, in which cultural purposes seeking to make T and D more inclusive were prominent. At the start of the year they had won a contract to provide training for all classroom support staff in the Local Authority. Within their own school they increased training provision for the wider workforce, for example by running a training programme for school meals supervisors, increasing the number of TAs pursuing professional development courses, and getting members from both of those

groups to join the appropriate Local Authority meetings. Whilst this was providing differentiated T and D for the needs of groups and individuals it was also part of wider work done to bring staff groups together and shift perceptions of T and D from a position where it was mainly for teachers toward one where everybody felt it was for them.

In a few schools activities were devised to improve induction, retention or succession. This was just for teachers in three cases where there were immediate needs to meet. One special school produced an induction handbook for all staff, developed the induction process specifically for teachers, but also introduced a training programme for welfare assistants. The most inclusive example was seen in a large comprehensive school, which undertook systematic work on the elements of the induction programme for all staff: the induction day; an induction package; regular meetings and allocation of a mentor. Middle managers who wished to move into more senior positions were encouraged to go on relevant courses and shadow senior managers. There was continuous emphasis on raising the skills of staff from all groups of the workforce in preparation for a new Vocational Centre. These initiatives were closely intertwined with ongoing work in the school and the creation of a developmental culture in the school by the head.

5.4.2 Actions to foster individual development

Many projects incorporated actions to promote the development of individual staff and some individual stories of career development were reported to us, although there was evidence of this having impacted on career aspirations in only six or seven schools. There was much more evidence of actions taken to identify needs, illustrated in section 5.2.3 above, and to help individuals do their current jobs better. A longer term view is needed in order to detect the effects on individual career trajectories of interventions such as establishing career pathways or to learn how far devices such as portfolios may assist staff to plan their development.

Prominent among the activities that were planned to contribute to the development of individual staff (as well as serving a school's needs and ultimately enhancing the learning of pupils) were coaching and mentoring, portfolios and means to promote reflection. In one primary school, individual TAs who were interested in training as teachers found the compilation of a portfolio and the reviews that followed helpful. A secondary school that used staff portfolios as one of its main interventions through the year wanted staff to see CPD in a more developmental way - as opening doorways, recognizing what T and D could do for them and developing a sense of progression; at first it was focused on teachers although later adaptations for support staff were added.

Coaching and mentoring featured in plans of some ten projects. One of those – a PRU - took a particularly systematic approach to it. All staff initially met weekly in coaching pairs before staff meetings. These pairs were self-selecting based on friendship and often crossed professional boundaries. The headteacher found a helpful coaching resource book and asked each member of staff to explain the chapter they had read in a series of staff meetings. The coaching process was reviewed through questionnaires in November, January and July; feedback from individual staff and the evaluation questionnaires showed that everyone found it

effective. Additionally, working in pairs with different roles had increased mutual understanding.

Other projects used interventions that were designed to build reflection into the daily work of staff. Typically, this was via a reflective journal. For example, at a Special School, the online portfolio had two elements: a staff development record, public to the school management team; and a personal reflective element, password restricted to the individual. This second element was used quite widely by teachers and TAs, although some noted that time restrictions meant that they only really engaged with it at points at which its value became clear, for example during preparation for Performance Management reviews. At one primary school the problem of lack of time was overcome by giving staff 10 minutes at the end of each weekly training event to write their reflective diaries. Some staff found this difficult to do, and needed more time following the events to reflect, and others took some time to 'learn' how to make use of this time.

5.4.3 Learning together

Box 5.3 gives an example of how interventions to foster individual development link with cultural and organisational purposes. This special school had undergone considerable organisational and cultural changes in recent years with a new Senior Leadership Team. Their Testbed team wanted to build from the structural and process changes that had been put in place. They believed that culture was absolutely crucial. The case illustrates how staff across the school were learning together in various ways.

Box 5.3: Learning portfolios and action learning

The schools project had two strands:

1. personal learning portfolios;
2. the development of coaching skills and action learning sets

To make development records more personalised they began with an inset day on different ways of recording individual 'learning journeys' during which a range of staff presented several models; each member of staff then contributed a learning journey, including both experience and impact, and these were displayed in the hall. The Testbed team was very encouraged by the diverse and creative responses of staff, although at the end of the year they felt that more time was needed to embed the approach. Training in coaching skills was provided initially to a small number of staff from different groups of the workforce who found it helpful for their current work and for career development. Some action learning sets were initiated to explore issues and to problem solve; one was composed of senior staff and the other of administrative staff, TAs and teachers who expressed an interest. Although these were at an early stage staff who were involved found the process productive; one TA said: "The learning set as in-service was very powerful."

6 Outcomes

6.1 Key points of the chapter

6.1.1 Findings

- Interventions that gave individuals the opportunity to reflect on their own training and development led in many cases to a range of positive outcomes, including improved understanding of T and D, greater engagement with T and D, and higher career aspirations
- Interventions that increased T and D opportunities often raised the profile and status of T and D, sometimes contributing to cultural change in the way T and D was viewed in the school
- A number of schools developed individuals understanding of their own role which had positive outcomes, including improved professional skills for support staff, role enhancement, and confidence to be independent, flexible and take responsibility for their own work and development
- Failure to consider the differing needs of staff groups and to provide access to appropriate T and D led to disengagement from T and D for those groups
- Interventions that involved working more collaboratively often led to better relationships between staff groups, particularly those working directly with pupils
- Interventions specifically targeting specific staff groups had a positive impact, particularly with midday supervisors in relation to pupil behaviour
- The mechanisms of change are complex and require attention to be paid to all aspects of the change process

6.1.2 Conclusions and recommendations

- Schools should consider promoting activities that engage staff in shared working, such as discussions (including performance review, coaching, and informal discussion) and joint T and D activity (such as whole school, cross-team and within teams)

Schools should consider how they can develop means to promote staff thinking about their roles, their training and development. If accompanied by appropriate training and development opportunities, a wide range of benefits for individuals and the school can accrue such as:

- Greater understanding of and engagement with T and D
- Higher career aspirations
- Cultural changes in the way T and D is viewed in the school
- Improved professional skills
- Role enhancement and development
- Confidence to be independent, flexible and to take responsibility for their own work and development.
- Senior level commitment is in most cases a prerequisite for success
- It is important to identify and act to take account of the different needs of individuals and groups

6.1.3 Introduction

In this chapter we turn our attention to the ‘outcomes’ of the project by which we mean the extent to which interventions produced meaningful changes. We have been able in many cases to make clear links between certain types of interventions and outcomes related to them, and our analysis has identified changes of four broad types:

- Outcomes for staff and school in relation to training and development
- Wider outcomes for individuals and groups
- Wider outcomes for the school
- pupil outcomes.

We examine here the range and extent of impacts associated with the interventions discussed in the previous chapter.⁷ The relationships between interventions and outcomes and between different outcomes are very complex. To help clarify these relationships, we use simplified 'causal paths' which summarise the main associations between types of interventions and their outcomes, and between outcomes. We also begin each section with a detailed case portrait of a school to exemplify the changes subsequently discussed.

6.2 T and D outcomes for staff and school

In this subsection, we examine T and D changes at the level of the individual member of staff and school level. The extended case below in Box 6.1 captures some of the key messages.

Box 6.1: T and D outcomes for staff and school – an example of a secondary school

The Testbed team felt that the most important outcome for the school was raising the profile of T and D for all staff. This in turn led to a positive image for T and D. A particularly striking outcome was the way in which staff spontaneously engaged in generating T and D activities for themselves and the informal sharing of expertise that underpinned this. This appeared to evidence the intended cultural shift in attitudes towards staff participating in and taking responsibility for their own T and D. Support staff recognised that they had greater opportunities for training and felt that this, together with other initiatives, led to better integration of staff. The Deputy Headteacher felt that a more pervasive climate of learning, and greater collegiality had been established.

Other specific outcomes/benefits for the school included greater informal seeking out of expertise (all staff), informal observations of teaching, and informal sharing of skills, e.g. in the staff room at lunchtime (mainly teachers). Support staff were more proactive in CPD and completion of portfolios, for example, going out to visit other schools to share information and ideas with their counterparts. This had some impact in bringing back new ideas to use in the school. All support staff participated in in-house T and D, including site staff. T and D was led at all levels ('filtered out not down'), evidenced by staff at all levels (mainly teaching staff) contributing to inset; and by the collegial approach of the Testbed team.

⁷ Of the 45 schools we worked with, four had achieved little for a variety of reasons, effectively withdrawing from the project or putting it on hold, and a further five had interventions that impacted entirely on teachers

Ideas from T and D were shared and developed in some departmental meetings. All departments had CPD on their agendas and minutes went to the assistant headteacher for CPD so further training requirements could be addressed. The growing awareness of the role of T and D and how individuals can be pro-active in their own development was evident. Several teachers also pointed to career progression as an outcome. Teachers and support staff pointed to improved confidence, better knowledge, and gaining new ways of seeing and doing things as a result of internal and external training.

6.2.1 Personal T and D related changes

Around a quarter of projects provided evidence of impacts on the school staffs **understanding of T and D**. Typically, this was related to interventions that enabled staff to consider their own T and D needs, usually through introducing performance reviews for support staff or other interventions that aimed to manage T and D effectively.

In five schools, **staffs understanding of the breadth of offer had improved**. This was related to interventions that provided opportunities to reflect on what T and D might mean and what was available. Usually a key purpose of these was to encourage engagement with T and D. At one small special school, for example, a learning-focused approach led to changes across all staff groups. A similarly organic, discussion-based approach was seen to lead to staff beginning to think about T and D as being more than courses. In other cases, different types of needs analysis led to staff thinking more broadly about the range of training and development.

Two types of intervention lent themselves to **greater engagement with T and D** for staff groups. The first involved understanding of T and D, as discussed above. In the six schools that used these kinds of interventions – audits, discussion, portfolios – we found that, as individuals understood their T and D needs and opportunities better, they engaged more with T and D. At a special school, for example, the introduction of T and D portfolios had led to TAs and teachers taking more responsibility for their own T and D. The portfolio provided a tool to help them do this, backed by strong support from the head; and at a PRU the introduction of a performance review system for most staff groups had provided an impetus to think more carefully about T and D. The example in Box 6.1 at the start of this section is a prime example of this type of strategy. The school took an open approach to the project, gathering information in the early stages to help form a strategy with a variety of elements to develop a culture of engagement with T and D.

The second, less common, type of intervention that led to more engagement with T and D aimed more generally to improve the engagement of staff with the school, usually by some combination of symbolic and structural changes that signalled that support staff were valued. A good example of this was the primary school discussed in section 6.4.3 below. At another primary school, engagement for TAs increased using joint TA meetings and being invited to staff meetings, and involvement in performance review. This was facilitated by a larger than average T and D budget and a focus on career advancement.

Interventions which attempted to provide more opportunities for T and D without considering its appropriateness for different staff groups were usually less

successful. For example, some schools invited all staff to training events, a symbolic act that, for many support staff, led (see 6.4.3) to a greater feeling of equality and being part of the school for TAs. However, where – as at one secondary school – the training events were entirely classroom focused, the initial sense of inclusion and engagement with T and D was dissipated. At another secondary school, the schools broader aims to enable all staff groups to engage with more breadth of training and development was communicated successfully to teachers and to a lesser extent to classroom support staff, but again the focus on teachers and TAs meant that other staff did not feel the same engagement. Both of these cases highlight that if changes are made that do not sufficiently consider how to engage wider staff groups, they can exacerbate differentiation between groups leading to greater polarisation of attitudes.

In seven schools there were outcomes clearly related to career aspirations for individuals, and it is likely that it was a factor in many more. A common purpose of these schools was developing a focus on career and it was found that involvement in longer term staff development opportunities (such as higher degrees) was closely associated with career engagement, as was the opportunity to reflect on training and development.

6.2.2 T and D changes at school level

Looking across the schools as a whole, by the time of our third visits, the great majority of schools (39 of the 45) had a comprehensive policy in place for most staff groups and, of these, 19 schools had a policy for all staff. This was a clear change compared with the start of the project.⁸

All of the 38 schools that responded to the questions on the initial proformas had a performance review system in place. Of these, 22 included all staff in the system, 11 involved just teachers and 5 involved just teachers and teaching assistants. In each of these cases – bar one – training and development was linked to performance reviews. As we note in Chapter 5, 17 of the Testbed schools took the opportunity to use the project to develop performance review systems, usually to include wider staff groups.

In about five schools the project had impacted on **access to T and D**. For example at one secondary school, a variety of interventions including staff audits, work in specific staff groups and some symbolic school-wide interventions (such as providing diaries to all staff) combined to enable all staff groups to feel the staff training budget was the province of all, not just teachers. At some schools, improved T and D systems had led to an improvement in the quality of T and D provision at the school level. These kinds of projects tended to aim to improve engagement with T and D, and providing adequate resources for this was an important component.

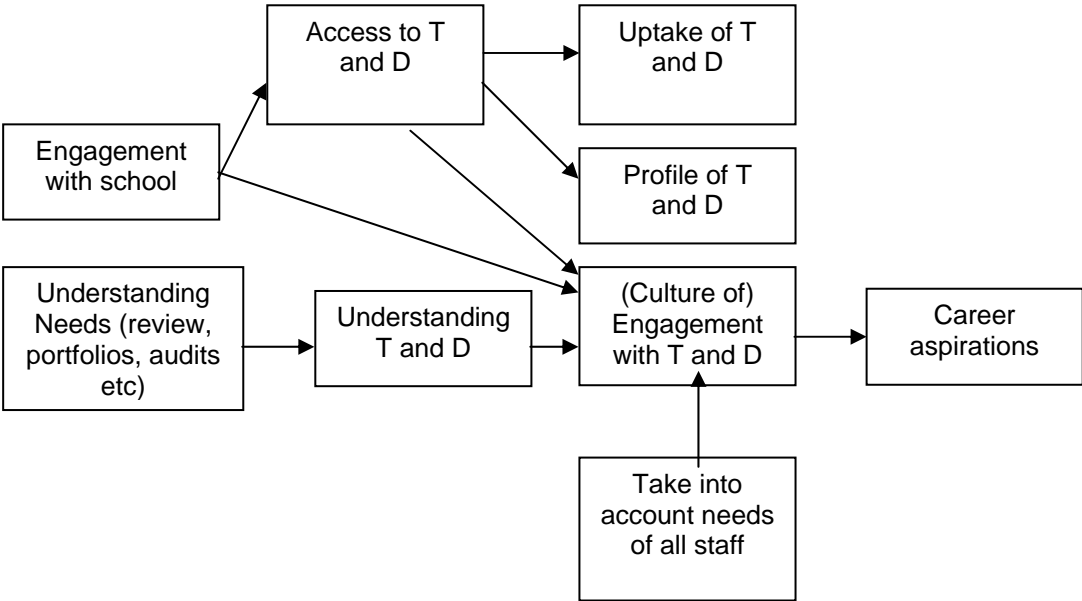
T and D outcomes at the school level sometimes focused on **raising the profile and emphasising the importance of T and D**. This often went hand in hand with improving access across the whole school workforce, again linked to purposes around building engagement with T and D. For example, at the secondary school noted in Box 6.2, staff development was stated as a priority in the school plan,

⁸ The figures at the start of the programme were less reliable since we only had data for 32 schools derived from initial proformas, but of these only 18 declared they had a similarly comprehensive plan

structurally and symbolically indicating its importance. Whilst this focus – particularly for TAs – was often on career progression, some schools tried to make it clear that T and D was about much more than that. For example, at one secondary school the Testbed team said the emphasis on development opportunities for all did not imply any lack of respect for those who just wanted to do the job they are doing well and who were not seeking any change or promotion. At some schools – at least three – Testbed team members identified that the introduction of portfolios had **raised the visibility of T and D** in the school, leading to more discussion of it.

In summary, the relationships between interventions and outcomes described in this subsection can be represented in a series of causal chains:

Figure 6.1: Causal chains relating to T and D outcomes



6.3 Wider outcomes for individuals and groups

There are a number of broader cross-cutting themes that impact at the level of individuals, and emerge across all staff groups. The two major categories here are Role Development and Personal Development. The extended case portrait in Box 6.2 exemplifies many of these changes:

Box 6.2: Wider outcomes for individuals and groups - the case of a special school

Evidence from the welfare assistants on visits 2 and 3, the evaluation questionnaire, the Testbed team and teachers all confirmed the success of the strand that focused on welfare assistants. It met its aims, with changes in all welfare assistants knowledge, self-esteem, behaviour, and capacity to undertake their roles effectively. This had directly improved pupil welfare. Alongside this they had gained a stronger identity as a team, and there was a culture shift as they became more valued by other staff, and felt more included in the school.

The changes in knowledge, behaviour, self-esteem and capacity to undertake their role had impacted on pupils welfare. A *cultural shift* had also taken place. Welfare assistants thought teachers and TAs valued and appreciated what they did more, and that they were treated with greater respect by other staff. Teachers also said that they had seen significant improvement in the way welfare assistants supported children; an assistant headteacher commented that 'they don't wander round the corridors looking at the floor, they're quite confident and talk to the children....they recognise their worth more... they'll talk to the children on the way out, which sometimes they would never have done.'

The welfare assistants became more involved in school and felt they had moved away from a 'them and us' situation. For example, they were now invited to school events, whereas previously staff would not have thought to ask them. They were also being asked to help in the classroom and go on trips, taking the initiative and asking to be involved.

Gaining certificates for the training has been important to the welfare assistants and several welfare staff have moved on to further education outside school, having seen advantages of training. The structured training programme in place led to them knowing that there was progression available to them.

6.3.1 Role development

In about 10 schools a range of differing interventions had contributed to a greater **understanding of role**. Questionnaires, clarification of line management and team membership and clarification of reporting lines enabled teachers and managers to clarify and improve their understanding of the roles of others. Interventions that enabled staff to spend time thinking about their role in the context of the school tended to have this kind of impact. These interventions included performance reviews, questionnaire surveys and engagement with formal study. In most cases, these were found in schools that aimed to develop communication and learning processes among the whole staff. In a number of these cases, this greater understanding of role on the part of staff themselves naturally led to **role development**. In a quarter of the Testbed schools, we found that one of the major impacts on staff groupings and the individuals within them was on a **change** in their roles.

In six of these schools, the interventions had clearly developed staffs **professional skills**. A typical example was a secondary school, which aimed to develop professional support staff. A combination of provision of training and development opportunities, raising the profile of T and D and rewarding involvement in T and D led to a number of notable outcomes, including staff feeling more knowledgeable, being better able to support pupils due to specific training and being able to work more effectively in general due to appropriate training. In at least three other cases this led

to a claimed impact on pupils, with appropriate training leading to midday supervisors and TAs working more effectively with pupils.

In other schools the link with pupil outcomes was not articulated, but there were still clear impacts on professional skills. For example, at a primary school, TAs and HLTAs had received specific training on matters such as dyslexia, and at a secondary school the lead TA found an audit had taken place which helped her to think strategically and develop confidence in her role. Interestingly, that school also provides evidence that where clear needs analysis does not involve certain staff groups, they are not able to develop professionally in the way they would like. There had been no audit or needs analysis for administrative staff; and they had taken on extra roles as a result of workforce reform but felt they had not received sufficient training. By the time of the final visit this group of staff was still not part of the whole school strategic approach to training and development, although some specific ad hoc training was taking place.

In about a quarter of the schools the project had helped staff **develop and enhance their roles** more generally. In two cases, this involved enhancing the roles of middle leaders to enable them to deliver whole school training and in another there were specific changes to senior leaders roles. At other schools, these broader developments could be linked again to needs analysis of various kinds, and the impacts tended to be expressed at the level of individual change.

As we note in Chapter 8, the Testbed schools, where successful, tended to link their changes to broader changes in line with external policy steer, and of course their own needs. This was particularly apparent where interventions around developing performance review took place concurrently with, and thus were clearly linked to, new guidance produced by TDA on Performance Management for teachers. Another area where schools linked Testbed clearly into broader aims was in taking the opportunity to try to use the project to develop staff roles – specifically support staff roles, for TAs and in some cases lunchtime supervisors – to focus more clearly on supporting learning. A good example here was a primary school, where the HLTA and other Testbed Team members provided evidence that TAs were now more clearly focused on learning following performance reviews.

6.3.2 Personal development

A common term used by schools when referring to personal development was **confidence**. In about a quarter of schools there was evidence of impacts on general confidence/self confidence or improved self esteem for support staff working with children (almost always TAs). But we found from looking at these schools in more detail that what was meant by 'confidence' needed to be specified more precisely and, in particular, in terms of dispositions and behaviours.

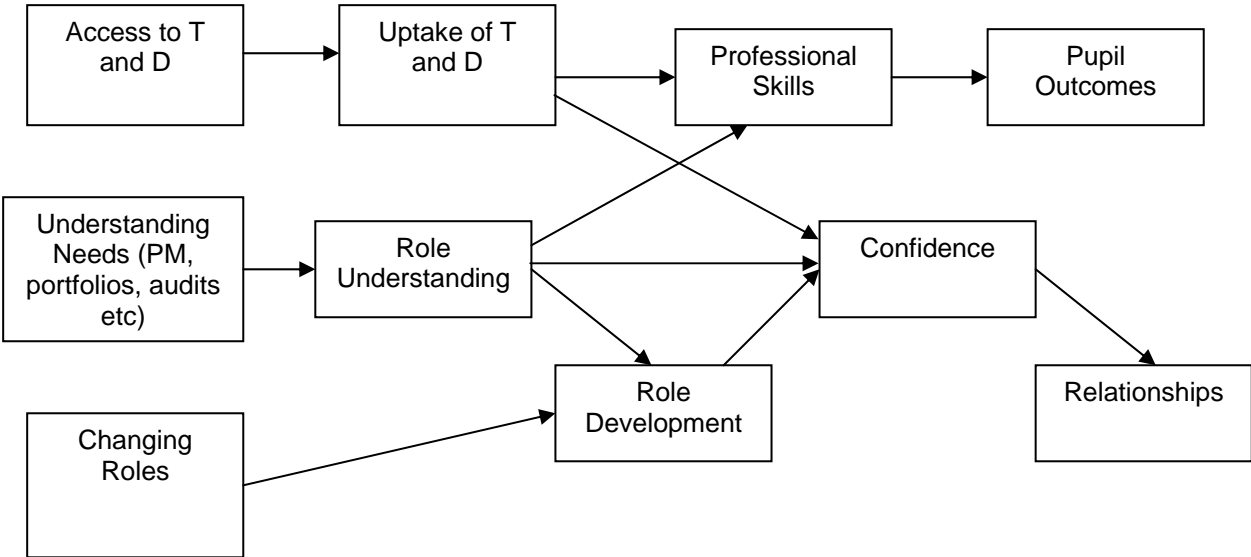
A number of schools provided evidence that the impact was on staff's confidence to take on more responsibility and independence (see the example in Box 6.3) and this confidence manifested itself in different ways. For example, at a primary school, midday supervisors said they felt more confident about asking teachers for help, and staff were generally felt to be acting more independently within the context of the schools plans; and at a secondary school the lead TA felt more confident in her role

more generally since she understood it better. At other primary schools TAs reported feeling more self-confident to engage in professional dialogue with others and in being observed.

Most of these examples indicate that work in relation to teachers had changed, a thread running through a number of schools, with support staff moving away from being directed by teachers to taking on a more independent role. Staff were sometimes concerned about managing this potentially delicate change in relationship. One example was in a special school which had always placed a lot of emphasis on ‘whole staff’ involvement. All staff were invited to take part in whole staff meetings and were paid to do so if it was outside their contracted hours and everyone had access to appropriate training opportunities. However, some support staff felt nervous and unsure when they were given the opportunity to take the lead in some of the discussions and activities in the focus groups. This surprised senior leaders who had assumed that they felt more confident than was in fact the case.

This subsection has been concerned with the following set of causal links:

Figure 6.2: Causal chains relating to wider outcomes for individuals and groups



6.4 Wider outcomes for the school

Here, we attempt to distinguish those outcomes that are principally at the level of the school. We have divided these into three broad categories:

- Links beyond the school
- Data and systems
- Cultural impacts

These changes are wide ranging, and difficult to link together. Therefore, we have selected a case portrait of one of these – cultural impacts – to use as an exemplar of this over-arching categorisation.

Box 6.3: Interventions leading to cultural change - an example of a secondary school

The project broke down barriers between staff, in particular bringing support staff much closer to the teaching staff. They felt the value of support staff to the school was highlighted by the developments and new structures. TAs felt they had a wider understanding of issues across the school.

An increased sense of value and belonging was created for some support staff. Providing cover for the library team to meet made them feel part of the school professional development system, and the administrative team felt that being allowed to close the office for weekly T and D activities made them feel valued. The administrative team leader saw this as 'a huge step forward'. Although progress has been made the admin team still perceive that there is some distinction between teaching and support staff. For example they were not invited to the 'making the staff room fun' team building day. 'I just saw them in the hall doing all sorts of fun stuff and that was one moment when I felt very much alienated' (Member of support staff). This highlighted that even in schools where much progress has been made, there is still work to be done.

The assistant headteacher thought (corroborated by an externally conducted survey) that staff were now happier, pointing to them enjoying coming together and sharing expertise, but recognising other factors were also making staff happier.

6.4.1 Links beyond school

In five (mainly primary) schools, the project had impacted on school-to-school relationships. At one primary school this involved the development of relationships already in place for the headteacher and other leaders. Another school was able to develop joint training and visits to other local primaries, focused mainly on TAs. In all of these cases, however, it was too early to say what the wider outcomes for the school would be.

6.4.2 Data and systems

It is quite difficult to separate the direct outcomes of the many interventions focused on improving data quality and school systems, and it is clear from Chapter 5 that this was a key issue in a number of schools. We found specific outcomes evident in about seven schools.

At some of these, use of better developed performance assessment data was important. For example at one primary school this helped the school identify specific weaknesses in the curriculum to be addressed partly through T and D. At another, a focus on developing a more formalised method of recording data helped some staff across the school think more clearly about T and D although many could not see the benefit of the specific system and therefore did not engage with it.

Alongside this, many schools developed systems to integrate staff better, most of which attempted to change staff cultures.

6.4.3 Cultural changes

The main cultural change we found in at least a quarter of the schools, was the impact of a range of interventions that led to **support staff feeling and being**

regarded much more as part of the school, more equal, and more valued. These generally occurred in those schools that explicitly aimed for this kind of change and were most apparent in primary schools (although note the secondary school example in Box 6.3).

In many cases, this outcome was associated with projects which tried to focus on, or had as a by-product, improving relationships between groups, typically where teams involved both teaching staff and support staff. For example, at a primary school, new teams had been created which led to changes in relationships as these staff comments indicate: 'TAs feel part of the teaching team rather than just helpers' (Nursery Leader) and 'Part of the process... There is more cross-over [and] the hierarchy is breaking down' (TA). 'It's more teamy... being allocated to a class helps' (Foundation leader). There were similar outcomes for lunchtime supervisors.

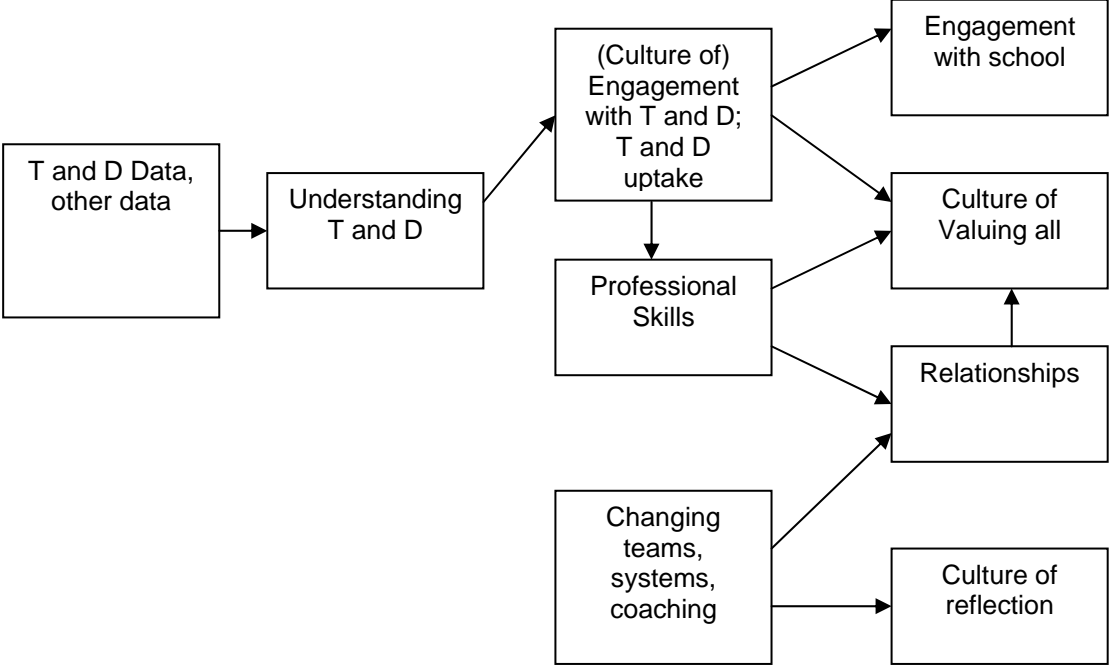
The role of the headteacher in indicating the value of support staff was important for supporting their integration in some schools. At one primary school, TAs were for the first time involved in training (which was held, with symbolic importance, at the headteacher's home) alongside other interventions demonstrating the importance of the TAs. At another primary school, the headteacher engaged in an informal training and development audit, alongside keeping a file of needs and activities undertaken. In both cases this led to TAs feeling more valued and thus increasingly willing to be involved in further training.

The improved professional skills noted in section 6.2 above led in a number of cases to improved status of support staff, and this was apparent elsewhere too, particularly where staff teams had changed to involve staff other than teachers. For example, a primary school had moved towards involving staff in 'ECM teams' that included TAs, and this had enabled teaching staff to appreciate better what the TAs brought to teaching and learning. At another primary school, teachers and TAs attended external courses together, and some we spoke with reported that they felt they had more equal status.

The other cultural change in about five schools was of a developing **culture of reflection**. For example, at one primary school, the simple device of setting aside ten minutes at the end of each weekly whole school training and development session (attended by teachers and TAs) had been accepted within the school, and provided the opportunity and impetus to build reflection into the every day work of these practitioners. This was reinforced by the 'reflection time' involving all TAs and teachers sitting together in the staffroom making use of this time. At a PRU, coaching had helped staff to think through how things could be approached differently in a positive way: 'Somebody to reflect with who won't be judgemental'. Staff described their work as taking place in the context of a long conversation, sometimes with their coach, sometimes in their team and sometimes with themselves, as continuous reflective practice.

We can summarise the main causal processes in this subsection here:

Figure 6.3: Causal changes relating to wider outcomes for the school



6.5 Impact on pupils

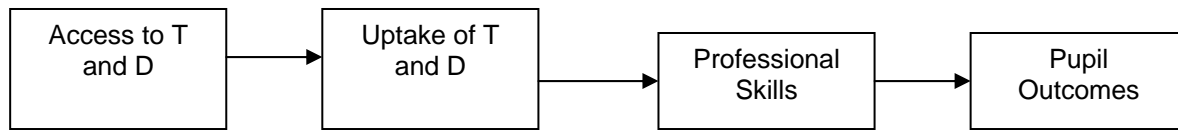
At the point at which we conducted our final visits, it was difficult for most schools to provide evidence that their interventions were having an impact on pupils, even where this was a specific aim. This was due to the nature of most interventions, which had a focus on making changes to systems and staff, with expected longer term effects on pupils. In the few cases where we did find direct impact on pupils, it was usually where a project had directly focused on professional development of staff who could make an immediate and direct change to pupils. This was typically, as exemplified in section 6.3.1 above, where midday supervisors developed their behaviour management skills and there was evidence provided of calmer lunchtimes. At other schools, claims were made about impact on pupil learning, but there was only one, a secondary school, that had reasonable evidence for this and that evidence related only to teachers (see box 6.4 below).

Box 6.4 Impacts on pupil learning

T and D of teachers is impacting on pupil learning. 18 of 22 responses from teachers showed that they had implemented strategies from recent INSET sessions or external training, and the senior leadership team confirmed that where practice had improved staff have attributed changes to training received. In addition a survey of pupils showed a connection between in-house T and D, practice in the classroom and improved learning. They were able to identify successful use of techniques from INSET sessions.

We can summarise the main causal chain in this subsection as follows:

Figure 6.4: Causal chain relating to impact on pupils



6.6 Representing the complexity of outcomes

In this chapter, we have presented a number of clear if complex relationships between interventions and outcomes, and between different outcomes. We can summarise these relationships at a more general level in a diagram (Figure 6.5 below). The categories do not match exactly with those presented in the early sections; and some categories have been altered or moved to aid clarity. The purpose of this summary diagram is to allow readers to trace chains of actions that can lead to hoped for outcomes.

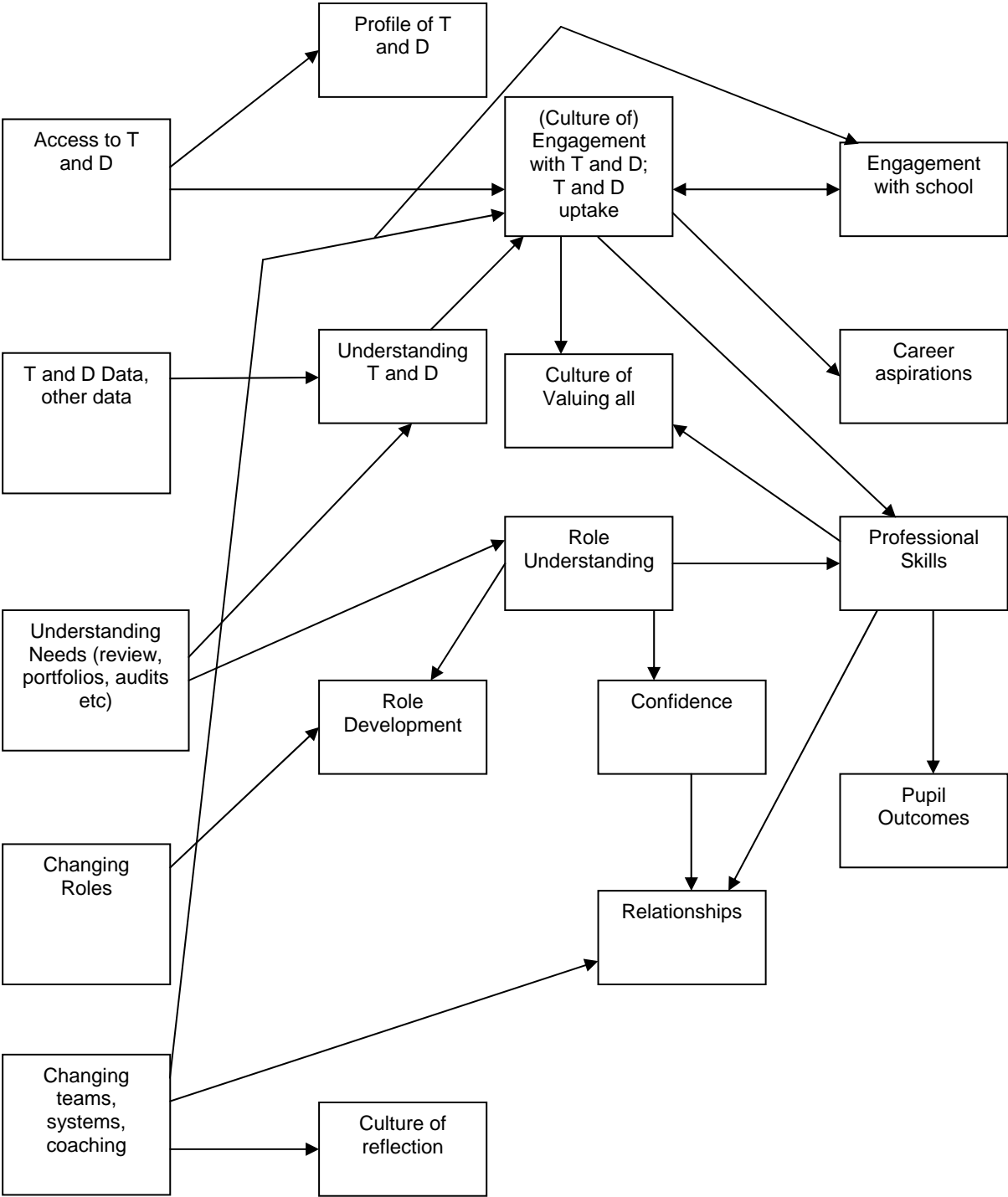
The diagram does not distinguish groups, but the majority of impacts reported - other than those at the school level - are for TAs, then midday supervisors, then administrative staff, then impact on other groups such as welfare assistants, technical staff and caretakers.

Whilst Figure 6.5 indicates the complexity of interrelationships, the more specific causal paths picked out throughout this chapter indicate that there can be a number of intermediate stages that each need attention. For example, the changes in pupil behaviour associated with more skilled midday supervisors typically required an understanding of training needs, identification of appropriate training and the provision of high quality training. To achieve something more complex such as developing a culture of valuing all members of the school requires a range of interventions, with a host of complex inter-related outcomes.

Figure 6.5: Summarising the main interactions between interventions and outcomes

Grouped interventions

Grouped outcomes



7 Factors influencing success

7.1 Key points of this chapter

7.1.1 Findings

The major factors that facilitated project success were as follows:

Starting points

- The project was consistent with the schools priorities, and was viewed as an opportunity to move things forward in new ways
- There was a springboard of existing staff development activities which could be built upon

Leadership and Culture

- The schools senior leadership had a vision of, and a commitment to, whole school T and D that was reflected in school policies
- This was supported by a strong developmental culture, in which:
- People trusted the vision and purpose of the leadership
 - People were open to change
 - Risk-taking was accepted
 - There was a general ethos of openness, participation and support
 - Teamwork was widely observed across the school
 - Motivation and morale were high.
- Those in leadership positions understood the complexity of perceptions and expectations across all the groups which made up the whole school workforce and responded positively and sensitively to these
- Those leading the project:
 - Were strongly committed to project success
 - Had clearly understood roles and responsibilities
 - Had the support of the schools senior leadership
 - Had credibility with the wider staff
 - Were seen as genuinely representing those staff groups with whom the project engaged
- Strategies were adopted that did not simply invite the engagement of support staff groups but genuinely facilitated and encouraged it

School structures and processes

- The schools structures were used effectively, or modified, in ways which supported the aims of the project through, for example;
- Facilitating interaction between groups
- Enabling staff clearly to understand their role and receive support
- Providing developmental opportunities through role change or promotion
- Effective communication processes were established which both communicated project purposes to the wider staff and enabled staff views to be fed into the decision-making process

Project planning

- There was sufficient planning and thinking time for all key players
- The project had a clear focus, but there was also understanding of its wider implications
- Those managing the project knew when and how to engage support

The major factors that hindered project success were as follows:

Starting points

- Competing priorities or initiatives

Leadership

- Misunderstanding, especially by senior staff and teachers, of the perceptions and feelings of particular groups of support staff, sometimes as a result of a 'teacher-dominated' culture
- The lack of a 'project champion' and/or ineffective or uninvolved senior school leadership

School structures and processes

- Structures that made internal communication difficult or left key staff groups uncertain of their role within the school
- Offering opportunities to engage in various activities without the supportive processes that made such engagement meaningful for those concerned

Project planning

- Insufficient consultation and communication leading to lack of buy-in by key staff groups
- A project that was too unfocused or which gave insufficient attention to the 'whole-school' aspect of the project
- Project support was not accessed, or was not used effectively

7.1.2 Recommendations for schools:

- Schools should use the above findings as a good practice resource to aid the establishment of whole-school training and development strategies and to help them ensure the conditions for success
- Where a number of the conditions are not yet judged to be present, priority should be given to establishing the conditions

7.2 Introduction

This chapter considers those factors that influenced successful achievement of the project outcomes outlined in the previous chapter. Successful schools were deemed to be those where:

- The strategy for training and development was significantly enhanced through discussion and review
- Increased opportunities for training and development were established for wider workforce groups beyond teachers

- There were positive responses about what the school had achieved across a number of key stakeholder groups

The purpose of this chapter is to provide a framework to facilitate thinking about the management of change in relation to the whole school workforce. The chapter begins by outlining three key factors that seemed to create a favourable context for project success, namely vision, culture and what we have called 'project fit'. It then proceeds to consider a number of key influences on project success relating to school structure, approaches towards the whole staff, leading and managing change and the utilisation of support.

7.3 Establishing a context

The external challenges that our schools faced varied considerably. For some, the project arrived at a propitious time. For example, the school was new, had just undergone a positive Ofsted inspection or had a new headteacher. These positive factors provided a favourable context. In other schools negative factors were at work, e.g. uncertainty about the future of the organisation, high staff turnover, or the departure of key staff. Often such negative factors tended to cause the project to be sidelined while more urgent problems were attended to.

Whatever the external pressures, the schools that engaged with the project most successfully tended to be characterised by three things:

- The schools senior leadership had a strong belief in and commitment to whole school training and development which was clearly expressed in the vision articulated by the headteacher and other senior leaders. They were able to sustain their commitment to the project, even where other pressures threatened to distract their attention
- The culture of the school was genuinely supportive of this vision
- This particular project was seen to be consistent with the vision and to offer an opportunity to progress their goals – we call this 'project fit'.

7.3.1 Vision

The most successful projects were typically characterised by a senior leadership who were deeply committed to the development of the whole staff within a value system that put people first. The following example demonstrates this. At the heart of this schools vision was the conception of the schools responsibility for the whole school staff.

Box 7.1: The importance of vision

In a large secondary school the SLT had a very clear vision for the direction for the school which was shared by most staff. They saw the school as one that liked to encourage innovation, they wanted staff to feel safe enough to take risks, try new things, and work with the other people. They saw CPD as providing the support needed to achieve this. They were trying to create an ethos across the whole workforce of collaboration, supporting, and learning from each other. The SLT believed that in a caring school it is important to care for both staff and pupils, and those that are cared for will then care for others. There was an emphasis on staff and pupils both as learners and leaders. Prior to the Testbed project CPD already had a

high profile in the school, and the school valued its IiP status. The 2006 Ofsted report noted that 'the leadership group are very clearly focused upon improving achievement through the continuous professional development of all staff.'

7.3.2 Culture

In the most successful schools, the vision of the senior leadership was typically reflected in the schools culture. The most common factors to emerge were consistent with those found in the broader literature of organisational change and school improvement. They can be summarised in terms of a supportive or developmental culture where:

- People trusted the vision and purpose of the leadership
- People were open to change
- Risk-taking was accepted
- There was generally an ethos of openness, participation and support
- Teamwork was widely observed across the school
- Motivation and morale were high.

More specifically, in some schools a cultural emphasis on personal development and opportunities for all staff was very significant. Supportive cultures of this kind took many forms depending on the particular context of the school. Three examples of positive cultures in different types of school are given in the following boxes.

Box 7.2: A positive culture in a primary school

In a very small primary school, the Testbed Team agreed that they were working within the culture to enhance rather than change it. The headteacher described the school as a 'nurturing school' that provided a learning environment for everyone and was very much based in its community. The relationship between children and staff was seen to be key and to be based on unconditional positive regard. The school set out to be warm, friendly and open to everybody, putting the children and their needs at the centre of everything and providing for creative learning within a structure. The staff felt that they played an integral part in creating this culture. The school abounded with references to openness and flexibility and lots of organic metaphors about growth, development and nurture were used. As one respondent put it when asked why the school was special: 'Dialogue, dialogue, dialogue, we reflect on and talk to each other about everything that we do'.

Box 7.3 A positive culture in a secondary school

The most striking thing about this large secondary school was the constant reference to growth and development. The school was full of stories of opportunities made available: the cleaner who became a part-time technician when it was discovered she knew how to repair sewing machines; the person who came to work in the school as a relative's child was 'playing up' and, after succeeding in calming him down and getting him back into class to finish his work, was asked by the teacher if he had ever thought about taking up this kind of work, and, starting part time, was offered lots of support and training and had just been appointed head of inclusion. TAs were encouraged to take the HLTA training; administrative staff coming into the school as temporary part timers from an agency were now in full time responsible positions. One member of the Testbed team started work in school by doing a few hours teaching first aid, became

teaching assistant in the post 16 centre and had now achieved a Cert Ed with the school's support. There was general agreement in the support staff focus group that in this school people were good at 'seeing the skills we've got and giving lots of praise' and teachers shared these perceptions.

Box 7.4 A positive culture in a special school

The deputy headteacher and the LA adviser of a special school agreed that it was an exciting place to work in, highly committed to the welfare of the pupils. They did not feel there were disaffected groups or individuals. The teachers, TAs, HLTAs and support staff worked closely together and it was not always easy to identify who occupied which role when watching them working with the children or meeting together to discuss areas of the curriculum. The focus groups working on the Testbed project were made up of volunteers from each of the three groups of staff. TAs and support staff were paid overtime to attend out of hours training sessions and over 60 staff attended the last training day. The headteacher set up a Staff Council for all staff except the Senior Leadership Group (SLG). This drew up its own agenda and the person who chaired a meeting brought the minutes to the headteacher and talked the issues through. There were training sessions for all every week. Attending these was part of the contract for teachers and TAs and other support staff were paid to attend. The TAs felt very well supported and that they had all the access to staff development that they wanted or needed. One said, 'I feel as though I learn something new here everyday'.

7.3.3 Project fit

A common view among many schools concerned the importance of 'project fit': the project was consistent with their current priorities; it could be integrated easily into development plans; there were complementary developments taking place to support it; the project was building on a good foundation of information and understanding concerning the issues it was addressing. In these circumstances, Testbed provided an opportunity, and often a stimulus, to pursue things in a focused way and to move things forward. Conversely the existence of too many competing priorities was likely to inhibit a clear focus on the Testbed project. There were some cases where pre-existing provision – for example existing CPD activity for support staff - provided a springboard, while in others the project provided an opportunity to change direction.

7.4 Providing structure

Alongside the context provided by culture, vision and project fit, structure appeared to be a significant factor. We identified three ways in which structure was important. First, structures enhanced or inhibited interaction between staff groups, especially across teacher/support staff boundaries. A common example from the primary sector concerned the attaching of classroom support staff to year groups or Key Stages. This was seen to enhance interaction, break down boundaries and facilitate teamwork. In secondary schools on the other hand, while some classroom support staff were attached to departments or faculties, others were engaged in separate special needs groups. These different locations could limit the ways in which these staff could engage with the wider work of the school.

Secondly, in some schools, structures provided clear frameworks that enabled staff to understand their role in the school and to receive support in that role. They also, incidentally, sent messages about the relative status of groups which were either helping or hindering in their effects. Many of the schools had fully to come to terms with how all these groups can best be managed, although some were engaging with it seriously. The following example illustrates this.

Box 7.5: Reflecting on structure

In a small primary school an early whole school review day focused on thinking about the structure of the expanding school. The staff discussed and tried to portray how they saw the school, as their part in the process of making explicit how the school worked. This produced a diagram which placed the head, administrators, cooks, cleaners and caretaker at the centre with teachers and TAs alternating in a circle around them. The pupils were portrayed as under or overlaying everything with the governors and parents on either side. The school photographs in the entrance were then organised into the same pattern with the pupils photographs being placed in a circle surrounding the staff. The Testbed team then worked to produce a diagram designed to clarify the lines of communication - 'who you go to, to ask what' and 'what's my role?' - and show how the school worked in practice. This had some characteristics of the classic organisational hierarchy diagram with some elements of a flow chart. The team felt that it looked more hierarchical on paper than it felt in practice but that this process clarified 'line management' relationships.

In many of the project schools effective performance review had not been developed beyond teachers and, indeed, in some cases the line management arrangements for groups of support staff were undeveloped or unclear. Where such structures were clear it was much more likely that the needs of particular groups would be identified, championed and met. The following example illustrates this.

Box 7.6: Establishing a structure for T and D

In a secondary school, line management had been an issue for support staff. Through the project a 'line management tree' was produced and displayed on their notice board. Job descriptions were handed out in order for the job holder to sign them off and review forms were devised and circulated. A clear induction programme was implemented - new starters were allocated a more experienced mentor for their first month or so and an induction pack/brochure was produced. The team also produced a termly newsletter. A personal review programme was also introduced. The idea was that this would now be conducted annually. The team felt that there were increased opportunities, and visibility of those for people to undertake training and that people were starting to take responsibility for their own learning.

Thirdly, structures could provide visible and meaningful channels for career progression. For many schools this is a challenge. Providing progression for groups other than teachers can come up against problems such as the small number of staff in some groups and the potential cost of implementing promotion grades, such as HLTAs. In large secondary school, the number of support staff enabled the development of systems and opportunities for promotion within the various staff groups not available in smaller schools. Smaller schools found dealing with career issues more difficult, but not always impossible. One primary school, for example,

developed documentation on career progression opportunities for TAs, a number of whom were undertaking sustained training and development with the school funding 70% of the fees. Three had achieved HLTA status and others were following them.

7.5 Engaging the whole staff

For many schools, developing the whole staff presented new challenges. We have discussed in Chapter 3 the complexities arising from workforce reform and the changing structures of school workforces. These need to be fully understood and taken into account to develop an effective strategy for whole-school T and D.

Our study found that schools varied in the degree to which they understood the range of perceptions and expectations of all members of their workforces. There was evidence in some schools, for example, that assumptions about particular staff groups were made by senior staff and by teacher members of change teams which, when tested in our focus groups, proved not to stand up to examination. Such assumptions were sometimes overly negative – for example, that particular groups were not interested in training and development when, in fact, they were if the circumstances were right. Sometimes, however, they were overly positive – for example, assuming that support staff were generally content with their circumstances when, in fact, they were not. The problem in the latter case often was that support staff liked working in the school, found the general climate conducive and had excellent relationships with teachers. Yet this did not necessarily prevent them from feeling undervalued and that things happened in the school mainly on the teachers terms. Sometimes there were simply misunderstandings or unrealistic assumptions about the views of particular groups. An example is shown in Box 5.1.

Success in aspects of projects that were aimed specifically at support staff seemed to be enhanced by a number of factors. First, projects that took care to identify the perceptions and needs of support staff were more likely to be successful. This meant considering not just support staff as a whole, but also the needs of particular work groups and identifying cross-cutting factors, such as experience and personal circumstances, which may lead to differences of perceptions and expectations among staff *within* groups. For some schools the mechanism for achieving this understanding was already built into the way the school was managed; others chose to use particular tools, e.g., questionnaires, to inform understanding and policy.

Secondly, actions took account of the needs and concerns that individuals or groups of staff had. Examples included payment or time off in lieu for working beyond contracted hours and the use of cover for support staff as well as teachers. However, the most effective strategies did not just make the engagement of the whole staff *possible*; they also made it *meaningful* through strategies to engage the whole staff actively in various development events. Examples are given in section 5.2.1.

Finally, the power of the ‘demonstration effect’ in encouraging engagement of the whole staff should not be underestimated. There were a number of cases where the successful experiences of individuals in areas that were seen as challenging was a strong encouragement for others to follow. For example, in a primary school the deputy headteacher expressed surprise about how few TAs at some other schools were undertaking further qualifications. At her school, she said, ‘nearly all are up for it ... they’ve had their families and think “I can have a career too”... it’s a huge incentive

seeing others do it... their vision has been aroused....aspirations are far greater... they are more ambitious...sharing their success stories.

7.6 Leading and managing change

As noted in Chapter 1, schools were advised to establish 'Testbed teams' to manage their projects. Most did this, although a small number chose not to – preferring to work through their established management structures. There seemed to be two 'core' models of leadership in the schools which established Testbed teams:

- 'Collegial leadership': The team contained a number of staff, often representative of some aspects of the wider workforce (never all) who genuinely worked together in project development and leadership
- 'Tight leadership': The project was led by one or two key staff, always senior leaders, perhaps with a small number of other staff within the team but having a secondary, supporting role

The majority of projects exhibited 'tight leadership', although this was often supplemented by the following mechanisms to facilitate wider engagement:

- 'Strand management': Individuals, and in one case groups, had responsibility for managing specific strands of the project. These strands may have operated fairly independently or the strand managers may have come together in the team
- 'Sounding board/conduit': A larger group, while not fully engaged in leading the project, was created to provide input from a wider range of staff. Membership of this group was typically by invitation and the formal status of participants varied. Typically members were chosen to be representative of the views of particular groups, or to provide links between the Testbed leadership and the wider staff.

It was notable that the management of many projects appeared to be teacher-dominated both in terms of levels of representation in the groups and in terms of where most initiative was taken. Thirteen schools Testbed teams solely comprised teachers - although in some of these cases they were supported by wider groups which acted as sounding boards - and a further 18 had a majority of teachers on them. Most were led by teachers – typically, but not always a member of the senior leadership group – with a very small number led by senior administrative staff.

All these models of project management could work effectively. The key question was not the pattern of organisation, but how it operated in practice. Project success was most likely where a number of conditions were met. These are described now.

7.6.1 Well-established leadership groups

In the project schools the groups played various roles, including:

- Leading the project
- Acting as a source of ideas and a sounding board
- Developing various aspects of the project
- Communicating with the rest of the school
- As a symbol of the nature of the project, especially the degree to which it was intended to be inclusive and to empower groups who had less influence

In successful projects the role of the project leadership group was made clear from the outset or established quite quickly, and the leadership and management of the project was seen to be truly representative of the staff groups with which the project was engaging. The symbolic effect was important. In one primary school, for example, which created a large Testbed team, the headteacher noted that ‘this sent out clear messages that we want to have people involved and take note of what they say’.

7.6.2 Effective leadership

In most of the schools which made good progress, the effectiveness of people holding key roles was a crucial variable. Personal dynamism, commitment, understanding, and an awareness of how ‘change works’ in their own school, were all aspects of this. In a small number of schools the lack of an effective ‘project champion’ appeared to be a significant inhibitor. Leaders were identified at various levels in different contexts. Sometimes – especially in smaller primary and special schools – the headteacher was clearly identifiable as the project leader. In other schools this role was delegated, most commonly to a deputy or assistant headteacher who had responsibility for CPD. In a few cases significant leadership roles were played by members of the support staff – most commonly senior administrators or bursars.

7.6.3 Support of senior leadership

In most cases the heads support was very important to the project even where they were not actively engaged in its leadership. Project leaders had to be confident that they had the authority to act in carrying out the project. This sometimes proved more problematic than it might first appear. In some schools, although the SLG (even the head) were members of the Testbed team and very committed to whole staff development, in practice this was seldom discussed in SLG meetings as these were often preoccupied with other pressing issues. This problem was magnified in a small number of cases where it was suspected by members of the Testbed team that the headteacher and SLG did not genuinely see whole staff development as a priority.

7.6.4 Good communication

Most of the successful projects gave attention to the establishment of effective communication strategies, including two-way channels between the project leadership and the rest of the school, through meetings, notice boards and other methods. These channels were used to communicate the leaders purposes and thinking and to establish a basic level of shared understanding of what the project was about; they also enabled the flow of information and ideas from the rest of the school. In addition, horizontal communication across staff groups was important in a number of projects. Of particular significance were flexible and adaptive processes designed to engage those staff groups which were relatively marginalised by existing structures and processes. Successful projects tended to consult early to identify the needs and concerns of key staff groups, to keep them informed and to try out ideas with wider groups where appropriate. On the other hand, insufficient consultation and communication tended to lead to misunderstandings in both directions and lack of buy-in by key staff groups (see Section 7.4 above).

7.6.5 Working together effectively

The most successful projects gave time for the Testbed team to work together in order to plan the project and to engage in any necessary data gathering or interaction with key others. All members, whatever their occupational status, felt that they had equal access to quality time for these purposes. In a primary school, for example, the Testbed team held a number of half-day sessions that helped to take the project forward. Related to this, the relationship between the project and the 'normal' management arrangements of the school needed to be clear.

7.6.6 Establishment of a focused and systematic change process

Establishing a focus at a relatively early stage proved extremely important; failure to clearly focus project efforts proved a hindrance and slowed progress considerably. It was also important that the right kind of focus was identified and commitment to it sustained. Thus projects were less successful where either the focus gave insufficient attention to whole-school issues or where the project drifted in this direction as it progressed. Some schools found it helped to focus on something concrete – for example, a particular initiative or the needs of a particular staff group. This often led to wider issues, e.g., relating to culture, becoming clearer over time.

It was also helpful to establish a systematic change process; what was understood by 'systematic' varied according to the culture and management approach of a particular school. Boxes 7.7, 7.8 and 7.9 give three examples of what it meant.

Box 7.7: Introducing a performance review system

A PRU developed a very systematic approach to the development of a performance review system involving a number of stages:

- Gathering data by questionnaire on staff views regarding performance review and the training that staff have received
- Researching possible models of performance review and undertaking a T and D policy review to take account of both the strategic needs of the service and individuals career development
- Designing policy, systems and documentation
- Consulting about the proposals: the project coordinator worked with other managers to agree the documentation and feedback was also obtained from other members of the Testbed team
- Preparation: A training day linked the SEF, the vision for the service and the SIP. Staff commented on progress and how they would like to improve the service. This was followed by a presentation on the new Performance Review system. This training referenced people's needs as expressed in the original consultation in order to bring people on board
- Implementation of the new system

Box 7.8: Developing portfolios in a primary school

A primary school Testbed team at the outset circulated a questionnaire focusing on four main areas:

- Establishing what staff understood by the term 'professional development'
- Recording previous T and D and formal and informal aspects of support
- Asking about experience, attitudes to, use of, and help needed re portfolios.
- Inviting comments on improving performance review

Responses to the questionnaire were collated separately for teachers, TAs, midday supervisors and those with admin/mixed roles. The team then developed examples of possible portfolios and asked for feedback, before putting together sample portfolios for all staff which were discussed at a T and D day. In addition to time for staff to discuss developing their own portfolios, opportunity was provided for staff and the SLG to develop a common understanding of how these would be used in the context of performance review and to raise awareness of training opportunities. The team then put the final portfolios together for all staff.

Box 7.9: Using focus groups in a special school

In one special school the main strategy used was the creation of what they called 'focus groups'. It was considered very important that membership of these was voluntary and people were encouraged to follow their own interests. Each group was asked to develop an action plan and set out their aims, but otherwise they were left to find their own path. Within the groups the leaders also tried to stand back and not impose their views on the groups. The deputy headteacher described the groups as having been 'on steep learning curves' and much energised by the process. The focus group leaders had a clear identity, role and status within the school; they were the most powerful in terms of status within each focus group but tried to redistribute this power within each group and work in collegial way. The groups themselves were representative of the groups of staff included in the project and the Key Stages. They consulted with their wider group of colleagues and beyond the school boundaries where appropriate.

7.7 Resources

Resources were identified as a key issue in fewer cases than might have been expected. The resource constraint most commonly identified was time, with finance mentioned in a few cases. As well as being a general concern, there were some specific problems with time, such as providing cover for key administrative staff. In one school where expenditure on CPD had been previously limited to few members of the teaching staff, an increase in the budget and its opening up to the staff as a whole was a key factor in widening engagement with T and D activities. The relatively low profile of these variables probably reflects an understanding among participating schools that the project was to be undertaken largely within existing resource bases. On the positive side, many examples were identified of the value of external support.

7.8 Project support from LAs

The support which schools received from their LA advisers varied considerably. Around a third received little or no support, except perhaps for some initial interest at the start of the project. Sometimes this was for reasons beyond the control of the school or the adviser – for example, when the adviser was ill, a post was vacant or the adviser changed. Sometimes it appeared that the adviser did not feel able to prioritise support for the Testbed project; but in other cases the school did not feel the need to call on the adviser's assistance. In at least one case, where progress was less than the school hoped for, the help of an experienced adviser might have been significant. For some schools the adviser provided valuable initial support but this then faded away. Where the adviser was fully engaged the support was a significant factor in the progress made. Advisers supported schools in a number of ways as shown below.

7.8.1 General support offered by advisers

Support of this kind generally involved attending meetings at the school, acting as a 'critical friend', reflecting things back and giving a different perspective. Of those advisers who played an active support role, many were instrumental in the following ways:

- Helping schools to focus to their objectives and develop success criteria
- Providing access to LA resources and to networks
- Acting as an adviser and mentor to the Testbed team
- Investigating resources or models for documentation to be developed
- Keeping up momentum
- Reminding schools of the need to keep in mind the whole school workforce

Their support was most helpful where it was negotiated at the beginning with a very clear understanding of what the advisers role should be.

7.8.2 LAs supporting data gathering and use

In some cases the adviser undertook particular tasks to support the Testbed project in the school. At a secondary school, for example, while not meeting regularly with the Testbed team, the adviser provided data, helped with the initial meeting with support staff, carried out and fed back the support staff survey. In another, she

strongly supported the gathering of baseline information and helped the school to adapt an IT programme that had been developed to gather this information.

7.8.3 Process support from LAs

Some advisers played an active role in working with staff within the project. For example, at one special school, the original adviser had a significant role in becoming the coach for staff and developing coaching skills in the school. Another school made sophisticated use of the adviser as a process consultant with staff. This included working with the school on a whole-school day on 'professionalism', running skills workshops for teachers, making presentations on their curriculum areas to non-specialists, working with all staff on developing CPD portfolios and developing a practice handbook for administrative staff. At one primary school the adviser carried out a needs assessment with TAs and then, as result of this, worked with the TAs on teambuilding activities. At another, the adviser helped staff map development routes and assisted the headteacher to train staff in conducting performance review.

8 Conclusions

8.1 Key points in the chapter

- In developing strategies, schools need both to establish a clear vision of the purposes of development and training for the whole school workforce and to design and implement small, practical steps towards these purposes
- There are a wide range of ways to enhance training and development for the whole school workforce. Schools should draw on the many strategies and interventions (including those described in this report) to select those which best meet their objectives and circumstances
- It doesn't matter whether a school focuses initially on a high level general objective or a lower level single focus because implementation is likely to require attention to many levels of school life
- Creating the right conditions for change should be seen as an important precursor to specific interventions
- To be effective, interventions need to be carefully selected and mutually supportive
- Schools would get the most out of their experiences of change by building in trustworthy (i.e. systematic) ways of monitoring, reviewing and rethinking what they do
- Formal evaluation and regular review of project success to date can offer a more incisive and potentially more productive assessment than the informal judgements which were more often made
- Schools should consider how they can effectively use external advice to support their developments in this area

8.2 Introduction

The purpose of the Testbed project was to explore how schools could best facilitate the training and development of the whole school workforce within the context of the Every Child Matters agenda and workforce reform. This chapter summarises the findings from our evaluation and suggests some issues which might usefully be considered by schools and policy makers.

8.3 Main findings from the study

8.3.1 Project purposes and outcomes

Schools participating in the Testbed project exhibited great variety in project purposes, in the nature of the interventions they implemented and, consequently, in the outcomes achieved. Figure 8.1 summarises the key dimensions of the school projects as reported in Chapters 4 to 7. It also suggests that the ultimate outcomes of whole school workforce development must be judged in terms of their impact both on the workforce itself - in terms of staff satisfaction and the career trajectories to which they have access - and on pupil outcomes. Our study took place over too short a

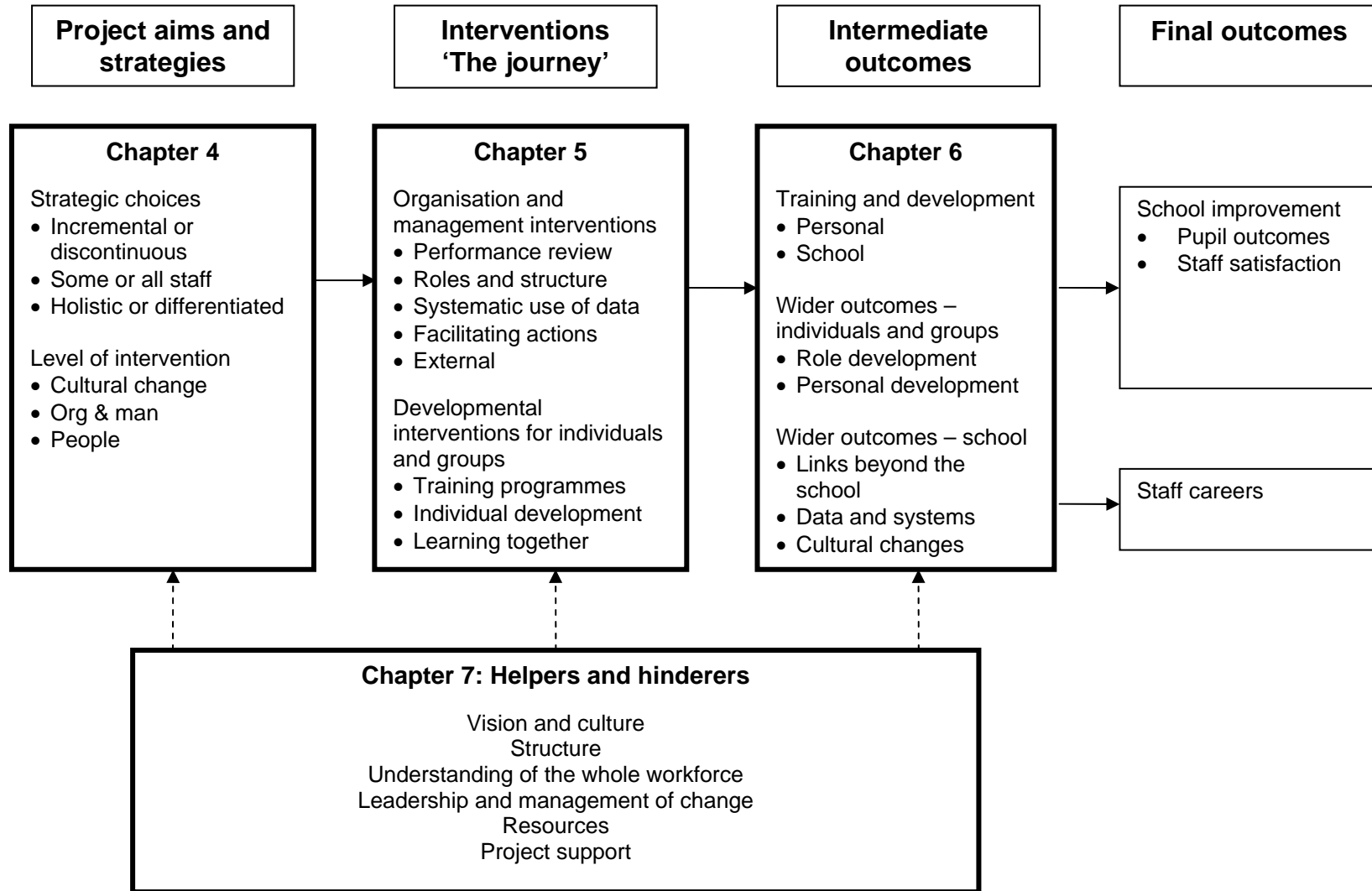
period of time to enable such longer term outcomes to be observable to any significant degree, although some positive indications are given in Chapter 6. The diagram uses categories and distinctions we have developed in the report to capture key features of what we found and to provide a manageable description of the Testbed projects. School life was, in reality, dynamic and complex. The parts that appear distinct in the diagram were in fact fundamentally interconnected and the process of change was iterative in that it was affected positively by feedback from actions taken which sometimes changed original assumptions and aims.

The main purpose of our study was to attempt to capture the lessons from the project that might inform policy and practice. Chapter 6 showed a range of outcomes for individuals, for particular workforce groups and for schools as a whole. The school-level changes comprised both changes in organisation and management and changes in school culture. A picture emerges of the benefits of encouraging different staff groups to work together. Building new teams in schools and encouraging joint involvement in training and development activities can help both groups understand the role of support staff better, and this enables support staff to feel more valued and engaged with the school. This can have a range of benefits, from engaging more with T and D to developing professional skills and confidence, which reinforces more positive views of the work of support staff, and can in turn lead to improved pupil outcomes. However, it is important that the differing needs of staff groups are attended to. For example, it is not enough to invite support staff to training sessions aimed at teaching staff; this is a recipe for disengagement. Support staff are much more likely to engage positively where such training and development takes their needs seriously.

In Chapter 4 we identified three major kinds of purposes that schools pursued: those associated with culture, with the ways in which the organisation works, and with the development of individuals and groups. The outcomes identified in Chapter 6 generally reflected these purposes. In particular key outcomes were identified in the following areas:

- Increases in skills, leading in some cases to positive pupil outcomes
- Enhanced understanding and development of roles
- Enhanced relationships and the building of more effective teams
- Improved systems of organisation and management
- Increased understanding of and engagement with T and D by individuals and groups, leading to fundamental cultural changes
- Other culture changes, especially the development of feelings among members of the wider workforce of being more part of the school, more equal and more valued

Figure 8.1 The Testbed project: overview



However Chapter 6 also demonstrated the complex ways in which particular outcomes inter-related. Quite specific or short-term objectives, such as those associated with training and development programmes for particular workforce groups, had effects on culture and capacity that may not have been directly planned for. Conversely, broad longer-term purposes normally required the implementation of shorter, focused steps if a school was to move effectively towards them. Project schools differed in the degree to which their strategies were based on 'small steps' or a 'grand vision', but a key finding of the study is that both are necessary, at least to some degree. To focus on small steps alone runs the risk of not addressing the fundamental challenges arising from the changing workforce; grand visions alone may result in changes in rhetoric but little real change on the ground.

8.3.2 Project interventions

In Chapter 5 we outlined the kinds of specific interventions that schools implemented in pursuit of their project purposes. We found a greater variety of approaches among schools than we had anticipated. Furthermore, the wide range of specific interventions were combined in a multitude of ways so that, in a very fundamental sense, the approach of each of the 45 schools was unique. The main purpose of Chapter 5, therefore, was to give readers an indication of the range of possibilities open to schools in developing their own strategies.

However, it is worth reflecting briefly on why the strategies varied so much. The reasons go beyond the initial very broad brief established by the TDA. First, the schools conception of training and development varied widely. At one extreme, projects focused on developing specific T and D initiatives to meet the needs of particular groups; at the other, 'development' was interpreted in terms of generating staffs engagement with and involvement in the wider community of the school. Secondly, as noted in Chapter 3, either by intention or by default schools interpreted the 'whole school' aspect of the project differently. Some developed projects that genuinely attempted to engage the whole workforce; others focused on specific groups, most commonly teachers and teaching assistants. Thirdly, for many schools the project provided the opportunity to *create the conditions* which would provide the basis for the development of the whole school workforce in the future rather than addressing training and development directly. This was particularly true of schools that chose to focus on developments relating to organisation and management.

8.3.3 Factors influencing success

Whatever their purposes, and whatever the strategies and interventions adopted, degrees of success inevitably varied. Chapter 7 outlined the influencing factors that we identified. These were associated with strategy, with structure, with the ways in which the characteristics and needs of the workforce are understood, and with project leadership and management. Again the specific constellation of factors was unique to each school. However, our judgement is that, in those schools that were most successful in making progress in relation to a broad range of workforce groups, most or all of these helping factors were relevant.

There are important lessons here. However, there are no easy solutions. An intervention or initiative that has worked in one school will not necessarily work in another unless the conditions (including structures, leadership and/or culture) are

right. It is necessary to look beyond the broad label for an intervention and to consider what will actually be done and how, and the larger purpose it serves in the specific context of the school. Equally, the blunderbuss approach of trying to do lots of things at once can dissipate energy and still fail to produce notable progress. Doing a small set of clearly defined things with achievable goals and a clear idea of what successful achievement of that goal would look like, but being able to learn from attempts at implementation, will work better. When interventions are combined care is needed to ensure they are mutually supportive and there are not too many initiatives in progress at once.

It doesn't matter whether a school focuses on a high level general objective or a lower level single focus because implementation is likely to require attention to many levels of school life. Those schools that aimed at whole school cultural change found that this resulted in or required small scale interventions to effect the larger change; schools that modestly aimed at changing a small aspect of procedure often found that they needed to give attention to the culture of which that procedure was an expression. The making and implementation of a plan could be a catalyst to sometimes radical rethinking of the vision of the school. This should be expected, welcomed and facilitated. It is an iterative process where the planning to do something, and the implementation, will in practice lead to better understanding of what the plan's underlying and often unarticulated assumptions were.

Despite an emphasis by the TDA that individual school projects should be effectively evaluated, and the consultancy support that we offered, the number of schools that formally evaluated what they did within our project timescale remained small. In some cases the expectation of such evaluation was premature: schools planned to evaluate their projects in the 2007/08 academic year as the project fully worked through. In most cases however, we saw little evidence of this delayed evaluation and this was not the reason for most schools not having completed a formal evaluation. Sometimes it was because the schools felt it to be too difficult: projects that address issues of organisation or culture are notoriously more difficult to judge against clear outcome criteria than are those concerned with narrower developmental purposes relating to individuals and groups. However, it was also true that the pressures of school life made it difficult for many schools to give formal evaluation much priority. This does not mean that schools did not make *judgements* about what they were doing and what the consequences were. The fact that such judgements were often informal, and were the product of discussion and debate rather than of the establishment of formal performance indicators, did not make them any less valuable as part of a school's development process. Nevertheless, formal evaluation can offer a more incisive and potentially more productive assessment and overall this was an aspect of the project that was less successful, and schools should be supported to try to set up ways of getting the most out of the journey by building in trustworthy (i.e. systematic) ways of monitoring, reviewing and rethinking.

This brings us finally to the issue of support. The main source of support made available to schools was TDA-funded advice from local authorities. Added to this was a smaller amount of support specifically for evaluation from the Sheffield Hallam University evaluation team. Schools made varying use of these resources. In some cases they appeared to judge correctly that such support would add little to the resources that they could generate internally. In others the availability of support was

limited for reasons beyond the school's control. However, in a few cases we judged that the judicious use of external advice would have enabled a school to make more progress. More generally, a number of cases reported in section 7.8 demonstrate a range of ways in which a skilled external consultant could add value to the leadership and management of a project. The key preconditions were, first, that the consultant had the appropriate knowledge and skills and was committed to the school as client, and secondly, that the school itself had the motivation and the skills to make the most of what was offered.

8.4 Rationales for T and D for the whole school workforce

When schools focus on the training and development needs of the whole school workforce (the teachers and the wider workforce) they can reap evident benefits. These come from greater understanding between individuals and groups about their roles and distinctive contributions. This understanding lays the foundation for a sense of recognition and a greater sense of being valued on the part of all staff, which in turn makes for a workplace and community that more effectively delivers holistic outcomes for children and young people.

As Chapter 3 demonstrated, there are many differences between staff groups and between individuals in these groups. Equity and inclusiveness is not necessarily the same as equal treatment. Whilst approaches should be inclusive, interventions may need adaptation and differentiation to be appropriate for different groups of the workforce. Where project leaders were aware of the need to check their assumptions about the needs, attitudes or aspirations of all groups and individuals within the schools there was a greater chance of progress.

Schools rarely articulated a clear rationale for including the whole workforce in the project plans and, as we have noted, a significant number of our schools focused their projects around staff working directly with children - particularly teachers and teaching assistants. While for some this was an initial step, with wider implementation to follow, for others, their focus seemed to reflect a view of the workforce that marginalised those groups less closely associated with the work of the classroom. The explanation given by some schools was that the development of some staff would less directly contribute to the performance measures by which the school would be held accountable. A challenge for inclusive T and D strategies is therefore to articulate approaches that, while maintaining a focus on the interests of pupils, might more effectively justify the inclusion of the other categories of staff and thereby underpin more equal attention to the whole school workforce.

Table 8.1: Approaches to whole school training and development

Type of approach	Conception of the school	Underlying assumptions	Training and development strategy
'Employee-focused'	A workplace	Employers have a duty of care to all employees to enable them to be respected, well treated and where possible enhanced by working here.	Ensure all staff have access to appropriate training and development: a focus on 'recognition'
'Community-focused'	A community	The school is a working community and will be healthy where all thrive, work together effectively and none feels excluded, marginalised or exploited.	Enable all staff to feel valued and work together as part of a mutually respectful community: a focus on 'relationships'
'Holistic Education-focused'	A source of indirect as well as direct learning and welfare	All staff interact with children and contribute significantly to the way children experience school and, consequently, what they learn and how they feel.	Enable staff to understand and contribute to learning and welfare as a shared purpose: a focus on 'contribution to core purposes'

We have identified three possible approaches (see Table 8.1 above). While these are presented for the sake of argument as separate they should not be seen in practice as mutually exclusive and all are legitimate. However, each has rather different implications for training and development. Approaches that are primarily *employee-focused* might be expected to be more pragmatic and piecemeal in the way they address the needs of different groups compared with the other two approaches. An *employee-focused* strategy might be expected to concentrate more on the specific requirements of particular jobs, while *community-focused* and *holistic education-focused* approaches are more likely to place relationships and underlying values and purposes more centrally. Which approach a school adopts will depend both on the underlying values it wants its strategy to express and also on its readiness to proceed in a particular direction.

8.5 Dissemination and replicability

The decision by TDA to require schools to work within the resources already available for T and D meant that disseminating and replicating successful projects was made more possible. Whatever was achieved in these Testbed schools was not the result of extra resources for a special project. It was the case however that many of the schools cited the importance of the fact that they were part of a national project, with built in moments of (low intensity) accountability such as the meetings with SHU, the conferences and the local authority support. This gave them the reason and opportunity to take stock in a more systematic way than usual and focused their minds. This feature may be less easy to replicate on a wider scale.

We have noted the importance of project fit and a facilitating context. All of the Testbed schools were volunteers and underwent a process of preparatory discussions. Nevertheless we found that project fit and context was variable between schools. This poses the question as to how best to enable all schools to engage successfully with this agenda.

The Testbed programme was an exciting initiative to explore the ways in which schools can address the issue of whole school training and development. The work of schools demonstrated many creative and effective ways in which great progress can be made. Success was dependent not on any single intervention, nor on simply having the best intentions, but was the cumulative result of respectful relations between all staff groups; structural arrangements that expressed and facilitated that respect; acknowledgement (and the effective meeting of) real differences; competently implementing clear and manageable interventions in pursuit of well articulated goals; and a willingness to change in response to how things were found to be going. Whether these features emerged from an effective culture or whether they constituted it does not matter. Acquiring the features of success is likely to be the key to real progress in the approaches taken to training and development. This is an ambitious and challenging task. What the Testbed projects showed was that it is an ambition that can be successful and is worth pursuing.

9 Annex: Guidance for schools

9.1 a) Letter to schools

[Address]

[Dear name]

Training and development testbed project

I am writing to ask for your help in developing a collaborative project to test out different approaches to training and developing school staff.

As part of its new role in developing the whole school workforce, the TTA (the TTA will become the Training and Development Agency for Schools (TDA) from 1 September 2005) would like to work in close partnership with up to 40 schools to co-design, evaluate and disseminate a series of school-based staff training and development projects over the next two years. The aim is to:

- test the approaches that will help schools develop a sustainable culture of learning and development for all staff;
- enable other schools to benefit from the results of the projects so that they can draw on these to develop their own staff's potential; and ultimately,
- contribute to improving pupils' learning and wellbeing.

More details of our project proposals and what they would mean for your school are in the separate document headed 'Training and development testbed project specification for schools' enclosed with this letter. We are also holding a conference in London on 13 October for primary schools to give interested schools an opportunity to discuss the project in more detail. The conference will enable you and some of your staff (please see the specification for details) to explore your current approach with the TDA, so that we can both develop our understanding of the key drivers, constraints and outcomes, and discuss how to foster a culture where school management and staff are both equally committed to fulfilling agreed training plans.

We are approaching a representative sample of schools (primary, secondary, special and PRUs) to join us in this work. We would welcome expressions of interest from any school that would like to be involved, whatever their experience of whole staff training and development so far. If you are interested, please let us know **immediately** by contacting Mark Coussins (tel: 020 7023 8206, fax: 020 7023 8606, e-mail: mark.coussins@tda.gov.uk) and then:

- complete the enclosed form giving us some background information about your school and return it to Mark Coussins, TDA, Portland House, Stag Place,

London SW1E 5TT **by 19 September**. This will help us ensure that we work with a representative range of schools. (We are not asking for any information that we could find from other sources.)

- let us know at the same time which of your staff you would like to bring to the conference on 13 October, so that we can ensure we have places for all who want them. We will send confirmation details of the event in response to your reply.

If you are **not** interested in joining the project, it would be very helpful if you could let us know immediately so that we can offer another school the opportunity to take part.

Yours sincerely

A handwritten signature in cursive script that reads "Mary Doherty". The signature is written in black ink on a light-colored background.

Mary Doherty
Director of Teachers' Programme

9.2 b) Guidance document

Training and Development (T&D) Testbed project Specification for schools

Context

The Training and Development Agency for schools (TDA) (formerly the Teacher Training Agency) has been asked by the Secretary of State for Education and Skills to take on a new role in improving the training and development of the whole school workforce, in order to enhance children's achievement and well-being.

Purpose and objectives

To help achieve this, the TDA intends to work closely with up to 40 'testbed' schools (15 primary, 15 secondary, five special schools and five PRUs) over the next two years to research, test and evaluate approaches, interventions and innovations that enable schools to develop a culture of learning, where all staff are committed to, and take responsibility for, their own development and the development of other staff. Your school is one of a representative sample of schools from the DfES database that are being invited to consider joining this project.

What we learn from the testbeds will be shared with other schools throughout England so that they can adopt approaches to T&D that have been shown to work well in bringing about lasting change.

Schools' involvement as training and development testbeds

The focus of the testbed project will be school improvement through continuous development of the competence and performance of all staff. Each school will work with the TDA to co-design their testbed approach to training and development. The starting point will be an identification of the strengths and the areas for development of the school's current approach. Each school will then work with the TDA to develop an effective, comprehensive plan, rooted in the context of the school's improvement priorities. It should address how the school will:

- identify training and development needs;
- source and provide training and development that addresses these needs;
- assess the impact of the training and development on the competence, performance and progression opportunities of staff;
- monitor access to, and impact of, training and development on the career progression and pay and rewards of all staff, and particularly for any vulnerable or under-represented groups;
- use school staff as coaches and mentors
- use occupational and professional standards to inform each stage of the development process;
- evaluate the relative value for money of different types of training and development;
- find the resources to implement and achieve a comprehensive training and development plan.

Schools will have responsibility for:

- deciding their own approach to training, development and remodelling;
- evaluating the implementation of their plans;
- contributing information to the TDA's national research and development;
- contributing to the network of testbed schools;

The TDA will:

- work through the locally-based School Workforce Adviser (SWA) network and CPD Advisers to support individual schools;
- develop an extranet to network all testbed schools;
- monitor progress through national research and development, ongoing communication with individual schools and through six-monthly conferences on progress (June 2006, January 2007, June 2007);
- capture and disseminate case studies, and provide advice and guidance for schools not involved in the project on what has been learned from the testbeds.

Funding

The Government has devolved funding for training and development of the school workforce to schools, so schools will be expected to find resources for their plans from their own budgets or other local sources. The TDA will meet any additional costs incurred by the school resulting from their involvement in the testbed project, for example the cost of attending conferences. These will be agreed at the co-design phase.

If your training and development plan includes enabling staff to gain nationally recognised qualifications or improve their basic skills, you may also be able to access training provision funded by the local Learning and Skills Council (LSC).

Next steps

If, after discussing this specification with your colleagues, you decide you would like to know more about the project, please:

- let the TDA know **immediately**- Mark Coussins tel: 020 7023 8206, fax: 020 7023 8606 e-mail: mark.coussins@tda.gov.uk
- complete the enclosed form to provide background and baseline information and return to the TDA by 19 September 2005. This will enable the TDA to ensure that schools involved in the project have a range of approaches to training and development. The form does not ask for information that is readily available from other sources;
- let us know who will be attending the inaugural conference on 13 October to discuss what is involved in participation. We suggest that the headteacher should be accompanied by a senior member of support staff and the person responsible for co-ordinating training and development for teaching staff and a subject leader.
- in late October 2005 the TDA will agree the schools to be involved as testbeds. This will be based on the form you have completed, discussions with you at the conference and the school's current approach to training and development;
- during November 2005 TDA staff will visit schools to co-design with each school their testbed approaches. This will be a one-day visit.

If you decide it is not appropriate for your school to be involved in the testbed project at this time, please let the TDA know (contact details) immediately so we can extend the invitation to other schools.

Timeline for the testbed project

- September 2005: Letter and testbed specification sent to a representative sample of schools.
- September 2005: Schools who may be interested in becoming a testbed school complete a form and also agree that the headteacher and up to two other members of staff will attend an inaugural conference in October (the TDA will cover supply costs of £150 per day for up to 3 or 4 members of staff).
- 13th October 2005: Inaugural conference for primary and special schools
- Late October 2005: On the basis of the completed form and discussion at the conference, the TDA will make the final selection of schools. The TDA will also draw up a reserve list.
- November 2005: TDA staff will visit each school to co-design the testbed approach. Two members of TDA staff will visit. The local authority School Workforce Advisers (SWAs) will also be invited to visit the school at the same time. Baselines will be established, success criteria identified and estimated costs agreed.
- January 2006-
September 2007: Schools will start testbed work as appropriate. SWAs will support each Testbed School for two days per month.
- January 2006-
September 2007: National Research and Development involving all 40 schools gets underway.
- January 2006-
September 2007: TDA staff will visit schools as appropriate
- January 2006-
September 2007: Identification and dissemination of outcomes of testbeds to other schools and to inform National Priorities
- June 2006: National conference with participating schools and relevant local and national partners.
- January 2007: National conference with participating schools and relevant local and national partners.
- June 2007: National conference with participating schools and relevant local and national partners.
- September 2007-
December 2007: Drafting of final research and evaluation report.
- March 2008: Schools across England begin to benefit from what has been learned from the testbeds.