Reducing teachers' workload: update

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Author Kathy Baker
LGiU/CSN Associate

Summary
This briefing provides an update on the review of teacher workload commissioned by the Secretary of State for Education. The briefing is mainly on the DfE policy paper, Reducing teachers' workload published on 26 March and the three teacher review group reports published on the same day:

- Eliminating unnecessary workload around marking
- Eliminating unnecessary workload around planning and teaching resources
- Eliminating unnecessary workload associated with data management

The DfE has also published A letter from the respective chairs accompanying the reports and a response letter from the Secretary of State.

This briefing will be of interest elected members and officers with responsibility for education and children as well as to teachers and leaders in schools and colleges, and parents.

Overview
In October 2014, the DfE launched its Workload Challenge with a month-long survey asking teachers for their view on how to reduce unnecessary workload. More than 44,000 people responded. The areas of inquiry were:

- unnecessary or unproductive tasks
- strategies that work in schools to manage workload
- what the Government and schools can do to minimise workload.

The DfE published the following on 6 February 2015:

- an analysis of the responses;
- the government response to the workload challenge

The challenge revealed that the three areas identified by teachers as the key offenders in leading to unnecessary workload were:

- marking;
- planning;
- data management.

Three review groups were set up to make recommendations about reducing workload in these areas and the three reports are a focus of this briefing. In the interim and in response to the findings of the Workload Challenge, the Government had already committed itself to:
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- giving schools more time to prepare for any government changes made to accountability, the curriculum or qualifications;
- sharing examples of successful practices schools have used to deal with teaching tasks that can cause unnecessary workload;
- tracking teacher workload by running a large-scale survey every two years. (A representative sample of schools was invited to take part in the first survey in February 2016 and the results will be published later in the year).

Ofsted is already committed to clarifying the guidance that explains inspectors’ expectations when they inspect a school, helping teachers and school leaders avoid some unnecessary tasks.

In a letter to the chairs of the three review groups on the publication of their reports, the Secretary of State commented:

‘As your reports make clear, there is no single factor that has led to increased workload in these areas...Rather a series of connected factors and decisions - taken at all levels of the education system - has created a situation where workload around marking, lesson planning and data management too often become an unnecessary burden’.

Briefing in full

Terms of reference

All three groups were set up to meet over a period of up to six months and then:

‘will be asked to make specific recommendations for action at the end of this period with a core aim of reducing overall workload burden in schools and improving efficiency’.

In terms of the purpose of the groups, each one had some aspects or work specific to its area, but shared some generic activity. This includes to ‘review current practices’ in their area; to ‘review the available research...including any international evidence’; to ‘consider approaches which would reduce the overall workload burden on teachers whilst supporting teacher professionalism and judgement’; and to ‘consider ways in which the outputs of the group can be disseminated, and the role for Government and its agencies in doing this’.

Their reports to be presented to the Secretary of State and Ministers in Spring 2016 were to include a set of principles for their area and recommendations about effective policy and practice.

Eliminating unnecessary workload around marking

The current problem

The report defines effective marking as:

‘an interaction between teacher and pupil: a way of acknowledging pupils' work, checking the outcomes and making decisions about what teachers and pupils need to do next, with the primary aim of driving pupil progress’.

The analysis of the workload challenge survey showed that 53% of sample respondents believed that while marking pupils’ work is necessary and productive, too much value is currently placed on written feedback and ‘the excessive nature, depth and frequency of marking was burdensome’. The report accounts for the burden of excessive written marking as resulting from the impact of...
government policy, the direction of Ofsted intervention and decisions taken by schools leaders and teachers. Marking according to this report, has evolved into an unhelpful burden for teachers because it is often serving a different purpose, such as demonstrating teacher performance, or to satisfy the requirements of other, mainly adult audiences. In effect, it is the marking itself which is being monitored by leaders rather than pupil outcomes and progress resulting from quality feedback.

The review group's remit was to look at what is termed, 'deep marking' which is not clearly defined or explored in educational research and is defined by this group as:

'a process whereby teachers provide written feedback to pupils with a view to improving or enhancing the future performance of pupils. Pupils are then expected to respond to the guidance which in turn is verified by the teacher'.

The group concludes that deep marking can act as a proxy for 'good' teaching as it is concrete and tangible and lends itself to 'evidence', and that the amount of marking is a reflection of teachers' professionalism and effectiveness. Yet no Government or Ofsted guidance or policy has set up this kind of marking as a requirement and the Teacher Standards refer to regular written and oral teacher feedback and an encouragement of pupils to respond to feedback, which can mean simply for them to act on what has been said.

Since there is little substantive evidence to support the current practice of extensive written comments, the review group advocates a professional judgement approach. However, the Education Endowment Foundation (EEF) is looking in detail at the existing evidence on marking as part of a review, to be published shortly, including gaps in research and where a better evidence is needed to serve teachers and leaders.

Consistency across a department or school is important, but this can be the result of consistent high standards, rather than unvarying practice. Shared expectation of marking is helpful to set the requirements, but each subject and phase should be able to determine the policy in their areas, drawing on teacher professionalism to create meaningful and manageable approaches. Policies should be judged against hours spent on marking and adjustments to requirements made where necessary. The group advises that feedback can be spoken or written marking, peer marking or self-assessment and if the hours spent do not have commensurate impact on pupil progress, the particular approach should be stopped.

In the Workload Challenge responses, a key driver of particular marking practices was seen to be Ofsted. In response, Ofsted has stated that it does not expect to see any specific frequency, type or volume of marking, and is only interested in the overall effectiveness of marking policies on outcomes for pupils. This is now included in the School Inspection Handbook. It is important that schools take notice of the Ofsted clarification and that Ofsted continues to train its inspectors so that these changes are reflected in inspection practice.

**Recommendations**

The group's recommendations on effective marking are based on it being **meaningful, manageable and motivating**. To change practice in classrooms involves two challenges:

- Embedding the principles of effective marking
- Challenging the false comfort of deep marking

These recommendations are summarised below:
DfE

- DfE should commit itself to disseminating the principles and messages of this report through system leaders.

Ofsted

- Ofsted should continue to communicate the clarification paragraphs in the inspection framework through updates and other relevant channels and monitor the impact of the revised framework on school practice.
- Ofsted should continue to monitor inspection reports and train inspectors to ensure that no particular methods of marking are praised as exemplars.

LAs/MATs/RSCs/Governing Bodies and School Leaders

- To use the three principles (see above) to review school marking practice as part of an overall and proportionate assessment policy in partnership with teachers and governors, evaluating the time implications of any whole school marking approach.
- In partnership with teachers and governing bodies, to monitor marking practice as part of a regular monitoring cycle and evaluate its effectiveness on pupil progress.
- To challenge emerging fads that indirectly impose excessive marking practices on schools.

ITT (Initial Teacher Training) providers

- To draw on relevant research and make trainees aware of emerging evidence.
- To ensure that requirements made of trainee teachers conform to the three principles of this report.
- To include a repertoire of assessment methods in training.

Teachers

- To develop a range of assessment techniques to support their pedagogy.
- To actively review current practice to ensure marking adheres to the three principles in this report.

Researchers

- To research current methods deployed in schools and work with schools to evaluate current marking and assessment practices in schools to promote good practice.

Eliminating unnecessary workload around planning and teaching resources

The current problem

Detailed lesson and weekly planning were identified by 38% of the Workload Challenge respondents as adding an unnecessary burden to general workload, and covered requirements such as producing annotated seating plans for each lesson, needing to revise lesson plans during the course of the week and having tight deadlines for submitting weekly plans. The planning review group believes that effective planning is key to effective teaching but wants to address this unnecessary nature of the work around planning.

Five principles are set out in the report that the group recommends be used to test practice and expectations in schools:
• **Planning a sequence of lessons is more important than writing individual lesson plans:** Lesson planning is a thinking process, at the heart of teaching and while individual plans can contribute to the process, detailed daily or weekly plans should not be a routine expectation.

• **Fully resourced schemes of work should be in place for all teachers to use each term:** Senior and middle leaders should ensure that fully resources schemes of work are be in place for all teachers to use each term. Planning should be about what needs to be taught across a sequence of lessons and avoid trying to fit teaching into neat lesson slots. Once schemes are in place, and teachers understand the ‘what’ and ‘why’ of the curriculum, they can be freed to teach in a way that suits their professional judgement and experience.

• **Planning should not be done simply to please outside organisations:** The lesson plan acting as a proxy can be a key driver of unnecessary workload as the requirement to produce detailed lesson plans is often linked to accountability evidence gathering rather than teaching, such as evidence for appraisal and for submitting to Ofsted during inspections. Lesson plans are evidence in the group’s view but not necessarily relevant to the question of whether the teaching involved is having an impact on pupil progress. Ofsted is now clear in the School Inspection Handbook that it does not require schools to provide individual lesson plans for inspectors.

• **Planning should take place in purposeful and well defined blocks of time:** If planning is to be effective, schools should identify blocks of time for collaborative planning and professional development. Government agencies need to support this by giving proper notice of changes for which the sector will have to undertake significant planning.

• **Effective planning makes use of high quality resources:** High quality resources support good teaching but too much time is spent by individual teachers trawling for resources. Planning should start from the curriculum being taught not from day-to-day activities. This is not ruling out groups of teachers developing high quality resources to support schemes of work, but the cost/benefit of searching or producing materials need to be a critical consideration. The group believes that there is an argument for schools to place more emphasis on quality assured resources, including textbooks, which often include digital supplementary resources, student books of teacher guides, reducing time spent on teachers searching for ad hoc resources.

**Recommendations**

These are summarised below:

**Government and Agencies**

• **DfE and its agencies** should commit to sufficient lead-in time for changes that require significant planning to implement and includes releasing relevant materials in good time.

• **DfE** should commit to using its influence to disseminate the principles and messages of this report through system leaders.

• **Ofsted** should continue to communicate the clarification paragraphs in the inspection handbook through updates and other channels.

• **Ofsted** should continue to monitor inspection reports and train inspectors to ensure that no particular methods of planning are praised as exemplars.
School leadership teams (SLTs):

- SLTs should ensure that there is ongoing work to develop a shared understanding of effective teaching to inform planning and contribute to CPD but should not automatically require the same planning format across the school.
- SLTs should ensure that, as a default expectation, a fully resourced, collaboratively produced scheme of work is in place for all teachers from the start of each term.
- SLTs should ensure that the highest quality resources are available, valuing professionally produced resources as much as those created in-house.
- SLTs should consider aggregating PPA time into units of time which allow for substantive planning.
- Subject and phase leaders should lead discussions on quality assurance with SLT/governors to help them understand where a subject or phase-specific approach may be most appropriate.

Teachers:

- Teachers should consider the use of externally produced and quality assured resources, such as textbooks or teacher guides.

Other bodies:

- ITT providers should review their demands on trainee teachers and concentrate on the purposes of planning and how to plan across a sequence of lessons.
- Subject associations and school networks/chains should review their offer to teachers on evidence of effective practice, research and resources.
- Publishers should continue to produce better quality textbooks, focused on the enduring knowledge of a subject or curriculum area which teachers can then supplement with more current resources in a mixed economy approach.

Eliminating unnecessary workload associated with data management

The current problem

The report emphasises that when used well, data can help teachers to teach, school leaders to focus on the key issues, Ofsted to do an effective job and the Government to understand how the education system is performing in England. However, 56% of the DfE Workload Challenge survey respondents claimed that data management causes unnecessary workload. Two reasons why this can be a burden are when the purpose of collecting data has not clearly identified how it will be used to improve outcomes, and secondly, when the process of collecting data is inefficient.

The accountability system at all levels, can be a driver of excessive data management demands and the example given is the way in which Ofsted in the past, was looking for evidence of pupil progress within single lessons and created a pressure for that progress to be measured. The report stresses that the ‘practices that developed in response to this challenge became increasingly led by systems, rather than for educational purpose based upon professional dialogue about what is important, by focusing undue attention on single lessons’. Although the Ofsted framework has changed, there is still evidence that the workload pressure have not been eased and teacher and school leaders continue to respond to the demands of the accountability system by trying to demonstrate school effectiveness and progress through an excessive and sometimes purposeless use of data. The review group is clear that schools need to be given very clear
signals that 'gold plating', that is collecting everything 'just in case' is unnecessary and counterproductive.

The implementation of new policies can sometimes have unintended consequences and place burdens on practice. The report uses the example of schools' use of levels in assessment, originally introduced as an indicator of achievement at the end of a key stage, but overused by schools to track pupil progress more widely. This 'describes the 'false comfort' that data can provide - a purportedly robust and numerical measure of pupil progress that...can be used to draw a wide range of conclusions about pupil and teacher performance...when in fact information collected in such a way is flawed'. Since the removal of levels, there has been anecdotal evidence that schools are introducing complicated systems that mimic levels. The Commission for Assessment Levels had already recognised this risk and has recommended further work to evaluate the value achieved by collecting assessment data, and understanding how effective, reliable and efficient approaches to collecting and reporting data on pupil attainment can be developed.

The review group urges the Government to ensure that the new National Curriculum does not place ill-considered demands on schools in terms of tracking progress and emphasises that School leaders should offer a curriculum that offers pupils a robust framework of teaching that builds in progression, challenge and depth of knowledge. Teachers can then make professional judgements of pupil attainment against key performance indicators, the big ideas that show whether a pupil understands and has grasped what they have been taught. Focusing on key performance indicators reduces the burden of assessing every lesson objective, the report advocates the idea that teachers do need to know if pupils are on track to achieve end-of-year expectations, but are best placed to make such judgements through their professional knowledge' without recourse to elaborate assessment, data generating and recording systems'.

The Government, Ofsted, local authorities, RSCs and school leaders are asked to support this approach. Again, Ofsted's changes to the school inspection framework in the area of schools using data are highlighted and involve no expectation of data being introduced in a particular format.

In order to arrive at principles of effective management, any data users should start by having clear answers to three questions:

- **Am I clear on the purpose?** Why is this data being collected and how will it help improve the quality of provision?
- **Is this the most efficient process?** Have the workload implications been properly considered and is there a less burdensome way to collect, enter, analyse, interpret and present the information?
- **Is the data valid?** Does the data actually provide a reliable and defensible measure of educational attainment?

**Recommendations**

These are summarised below:

**For everyone involved in data management:**

- Collect data that is purposeful, valid and reliable, using the principles from this report.
- Be prepared to stop collecting data if the burden of collection outweighs its use.
Do not reward ‘gold plating’
Use data in the format available and collect once only but use many times
Take measures to understand the cumulative impact on workload of new initiatives and guidance before implementation.

**DfE**
- Ensure that officials, RSCs and system leaders supported by Government commit to the principles in this report.
- Implement the common data standards developed by the Information Standards Board and modern data transport options under Data Exchange as soon as possible.
- Bring forward the release of both validated and un-validated data to as early as possible in the cycle so it is available when decisions are taken to prevent unnecessary duplication in schools.
- Reduce the number of log-ins schools need to use simply to access and share information with the DfE.
- Consider including data management skills in national qualifications for school leaders.

**Ofsted**
- Continue to communicate the clarification paragraphs in the inspection handbook through updates and other channels and monitor the impact of the revised Framework on the practice of schools.
- Continue to monitor inspection reports and train inspectors to ensure that no particular methods of planning are praised as exemplars.

**LAs, MATs and School Leaders**
- Use software which adheres to common definitions and standards.
- Conduct a regular audit of in-school data management procedures to ensure they remain robust, valid, effective and manageable for staff.
- Do not routinely collect formative assessment data and summative data should be collected only as frequently as essential to ensure appropriate action is taken between collections. (No more than three times a year)
- Review assessment which leads to data generation and consider a range of approaches, including standardised tasks/tests.
- Make data accessible to all stakeholders in an appropriate form.
- Take a strategic view of assessment demands throughout the school year and implement an assessment and data management calendar.

**Governing Boards**
- Do not present data in any other format that that which the school regularly and routinely presents.
- Keep data requirements under review and challenge governors and leaders to collect the least amount of data possible.

**ITT providers**
- Ensure strategic use of data to inform teaching and learning and understanding of assessment is part of any initial training.
Teachers

- Record data accurately.
- Query reasons for any data being collected and suggest better alternative sources of data if better ones exist.

Initial government response

The joint letter from the three review group chairs formally commends the three reports to the Secretary of State, though the terms of reference make it clear that the reports were agreed with the DfE ahead of publication. The letter highlights ‘some overarching themes…These are broader contextual factors that (we urge you to consider) to ensure that our more detailed recommendations on marking, lesson planning and data management are able to have the positive effect we all hope for’. These themes are:

- the need to reduce unnecessary teacher and school leader workload as ‘an end in itself’. It allows teachers and leaders to better support learning outcomes for students, but it also gives back teachers a proper work-life balance;
- more attention to be given to the pace of national change to ensure that government reforms can be implemented effectively, without placing excessive demands on teachers and school leaders;
- a plea to the Secretary of State to place her trust in the dedication, creativity and professionalism of teachers and school leaders and to continue championing the ability for schools to make decisions that suit the needs of their pupils.

In response the Secretary of State supports the chairs’ view that ‘action needs to be taken by all parts of the education system - from practice in the classroom to policy set at Westminster.’ She directly commits herself to ‘rise to the challenge (you have) rightly set Government’ and urges others to do the same. She also reaffirms her commitment to reducing teacher workload and her determination ‘to support the professionalism and autonomy of the excellent classroom practice in this country’.

Comment

The three review reports which are the focus of this briefing contain a lot that is not particularly new. The problems related to marking, planning and resources and data management, and their implications for teacher workload have been rehearsed many times in the past. Yet these reports reflect the input of professionals in schools who are right at the heart of the processes they describe and therefore not only do they diagnose the problems cogently, but they crystallise the impact of the conflicting drivers involved. These are around the pressures on schools over the last 30 years or so which have drawn leaders and teachers away from what they know to be professionally valid and towards the need to produce more and more evidence to satisfy external bodies holding schools to account. These reports re-assert the need for greater individual teacher judgement and autonomy within an institutional framework of professional expectations around key areas of pedagogy.

There does seem to be a lack of concrete plans for taking forward the report recommendations apart from some vague references to case studies in the terms of reference. It is hoped that the DfE will continue its leadership in this area by developing an action plan in conjunction with the teachers involved and national partners.
A greater problem, however, is that accountability in education remains broadly the same, despite the revisions to Ofsted expectations. The need to try and reform patterns of professional behaviour in schools is important but there is also a case for reviewing the accountability framework to see how fit for purpose the inspection framework remains in the new world characterised in these reports.

The Secretary of State is passionate in her support for removing unnecessary workload and will continue to champion the cause in her speeches and other communications. It is interesting to note that there is no sign of any similar commitment to one of the review group chairs’ overarching themes concerning the pace of government reforms and the issue of avoiding placing excessive demands on teachers and school leaders. In fact, the pace of political change continues to be unrelenting with the changes to curriculum, primary school assessment arrangements, GCSE and A-level, the new ‘coasting’ school requirements and the Government ambition to academise all schools by 2022 placing new demands and no doubt additional workload on large numbers of teachers. Looking at this bigger picture, it is difficult to see how these reports’ recommendations made in the context of schools and classrooms on a daily basis can be culture changing without the Secretary of State applying the unnecessary workload tests to national change which goes wider than classroom practice.

**External Links**

DfE policy paper, *Reducing teachers’ workload* (26 March)

Three teacher review group reports (26 March):

*Eliminating unnecessary workload around marking*

*Eliminating unnecessary workload around planning and teaching resources*

*Eliminating unnecessary workload associated with data management*

A letter from the respective chairs accompanying the reports and a response letter from the Secretary of State (26 March)

**Related Briefings**

DfE Workforce challenge for schools and teachers and response (March 2015)

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