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INTERIM REPORTS

Research Survey 6/4

PRIMARY WORKFORCE MANAGEMENT AND REFORM

Hilary Burgess
The Open University

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PRIMARY REVIEW INTERIM REPORTS

PRIMARY WORKFORCE MANAGEMENT AND REFORM

Primary Review Research Survey 6/4

Hilary Burgess

April 2008

This is one of a series of 32 interim reports from the Primary Review, an independent enquiry into the condition and future of primary education in England. The Review was launched in October 2006 and will publish its final report in late 2008.

The Primary Review, supported by Esmée Fairbairn Foundation, is based at the University of Cambridge Faculty of Education and directed by Robin Alexander.

A briefing which summarises key issues from this report has also been published. The report and briefing are available electronically at the Primary Review website: www.primaryreview.org.uk. The website also contains Information about other reports in this series and about the Primary Review as a whole.

We want this report to contribute to the debate about English primary education, so we would welcome readers' comments on anything it contains. Please write to: evidence@primaryreview.org.uk.

The report forms part of the Review's research survey strand, which consists of thirty specially-commissioned surveys of published research and other evidence relating to the Review's ten themes. The themes and reports are listed in Appendices 1 and 3.

This survey relates to Primary Review theme 6, **Settings and Professionals**.

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PRIMARY WORKFORCE MANAGEMENT AND REFORM

Introduction

The last twenty years have seen a profound change in the way primary schools have been managed and organised, alongside a fundamental restructuring of the professional school workforce. These changes have created both controversy and debate among policy makers, teachers and educational researchers. This report provides an overview of the impact of policies upon professional workforce management, reform and support and assesses recent developments in England and Wales and elsewhere in the UK. A brief comparison with the USA provides a global context for understanding key issues that impact upon teachers and other professionals in primary schools.

The time span for this survey is relatively short and focuses on the period from 1998, when the government published the Green Paper, *Teachers: meeting the challenge of change* (DfEE 1998), to the present day. The survey is necessarily selective, and includes those policies and research studies deemed to have the most impact on the practice of the professional primary school workforce.

A number of research studies have been examined in detail. They include, in particular:

- NFER evaluation of the National Remodelling Team (Easton *et al* 2006)
- Transforming the School Workforce Pathfinder Project (Thomas *et al* 2004a)
- The impact of New Labour's education policies on primary school teachers' work (Webb & Vulliamy 2006)
- The deployment and impact of support staff in schools (Blatchford *et al* 2004).

All research needs to take account of the political, educational, social and cultural emphases of the time in which it is conducted and this review will begin by providing a brief context for the research reports that are discussed.

Context

The Education Reform Act (House of Commons 1988) introduced a National Curriculum for all schools in England and Wales and began what was to be a succession of curriculum and other reforms that would have a major impact upon the primary workforce through curriculum specification, assessment of pupils at the ages of seven and eleven, the inspection of schools by the newly created Office for Standards in Education (Ofsted) and the introduction of specific standards for teachers and teaching assistants. The breadth of curriculum activity that teachers in primary schools had to undertake to meet the requirements of the new Act created an immense workload with associated stress for the primary teaching workforce. This in turn led to major problems in terms of the recruitment of head teachers and the retention of teachers and initiated concerns among the teaching profession and teaching unions that these issues had to be addressed.

Studies by Ofsted (1993) and the National Curriculum Council (1993) both reported that the National Curriculum was severely overloaded and difficult to deliver. Research into curriculum reform (Campbell & Neill 1994a) explored the amount of time spent on work by teachers at Key Stage 1. This study found teachers conscientiously trying to make the reforms work but discovered little curriculum change had occurred because of structural faults in the 'reformed' curriculum, confusion over assessment and working conditions that did not support the reform process in infant schools. At Key Stage 2, research focussed on

issues arising from the implementation of the National Curriculum and assessment procedures and argued for a curriculum framework that was both flexible and enabling and for stronger partnership between the government and teachers (Pollard 1994). The Dearing review (1993) addressed some of these issues by reducing the statutory curriculum and introducing up to 20 per cent non-National Curriculum teaching time. In primary schools, methods of teaching remained the prerogative of teachers although reports advocated broadening the range of teaching roles to include specialists as well as generalist class teachers, various forms of grouping, including by ability, and a greater use of whole class teaching (Alexander *et al* 1992; Ofsted 1995).

The National Literacy and Numeracy Strategies were introduced in 1998 following international achievement studies that showed English children were not performing as well as their peers in other countries (Second International Mathematics Study [SIMS] 1993; Third International Mathematics and Science Study [TIMMS] 1996). Ofsted reported that a majority of primary teachers welcomed the introduction of the National Literacy and Numeracy strategies (Ofsted 1999) as the statutory requirement to cover all the non-core foundation subjects in full was relaxed. However, these strategies had a wide-ranging impact upon methods of teaching in primary schools as they specified the amount of time to be spent on these subjects, while the lesson format for teaching the prescribed content resulted in more whole class subject teaching.

In 2003 the Primary National Strategy was launched with the aim of supporting teachers across the whole curriculum, offering teachers more control and flexibility and building up teachers' own professionalism and capacity to teach better. In essence, teaching excellence and pupil enjoyment were to be combined (DfES 2003a). The strategy covered issues impacting upon school character and innovation, excellent primary teaching, learning with a focus on individual children, partnership beyond the classroom, leadership in primary schools and the power of collaboration, managing school resources and workforce reform in primary schools. A key element of the workforce reform strategy, identified in the Primary Strategy launch document *Excellence and Enjoyment: a strategy for primary schools*, was the use of teaching assistants. The document states:

The National Agreement aims to make sure that increasing numbers of support staff, and ICT, are used in a way which helps improve standards and also reduces teachers' workload so that they have more time to spend on their most important tasks. Our survey showed that the way support staff were used strongly influenced the effect they had. Almost all headteachers thought that support staff used for learning and teaching raised standards. Over half the headteachers thought that more administrative staff helped reduce workload; and seven out of ten thought that staff supporting behaviour and attendance reduced teacher stress.

(DfES 2003a: 7.4)

Research that has examined the Primary Strategy has focussed on the emphasis on individual learning, for example, Brehony (2005) in his analysis of primary schooling under New Labour argues that the lexicon of progressivism is 'being re-appropriated by New Labour' (Brehony 2005: 40) through the emphasis on personalised learning and the individual child. However, as Alexander (2004) argues, the Primary National Strategy 'vision' of a curriculum that has breadth and balance and enshrines excellence and enjoyment is diminished through the embedding of the Literacy and Numeracy Strategies and national targets for pupil achievement in English and mathematics.

The Children Act and the publication of *Every Child Matters: change for children* and *Every Child Matters: next steps* (DfES 2003b; DfES 2004a) initiated changes in the reform process that would have a major impact upon the primary school workforce. The first report defined the relationship between wellbeing and educational achievement and paved the way for the

development of extended schools where there would be access to and liaison with external services (social services, health care, child care) thus creating coherent provision for the needs of children. There was also a proposal to develop a Children's Workforce Unit to develop a pay and workforce strategy to address recruitment and retention. The 'next steps' report set out the structure and remit of the UK Sector Skills Council (SSC) for Social Care, Children and Young People which would deliver the reforms that had been proposed. A federated structure was proposed which would:

- Bring together those working in social care with other occupational groups who work with children
- Be required as a condition of its licence to set up and maintain a UK Children's Workforce Network which would bring together all those who worked with children, young people and families.
- Allow each country within the UK to develop operational arrangements in line with their own policy. For England, this meant an approach to workforce planning and children's workforce that would be co-ordinated through a Children, Young People and Families Council.

The Children's Workforce Strategy (DfES 2005) is a significant document in the governments' remodelling agenda as it incorporates New Labour's drive on social inclusion and its intention to tackle the tail of underachievement and child poverty. All of these policies are largely being directed through the remodelling of education and schools. In 2005, a prospectus for extended schools set out what was to be the core offer of services accessible through schools by 2010. Underlying all these policies was the governments' aim to raise standards and improve pupil achievement.

These policy developments in curriculum organisation and methods of teaching in primary schools provide the background in which proposals for remodelling the school workforce emerged.

The next section of this survey focuses upon some of the key issues and research studies linked to workforce remodelling in terms of the early agreements and planned phases for the introduction of these changes.

The case for modernising the teaching profession

The Green Paper *Teachers: meeting the challenge of change* (DfEE 1998) set out the case for modernising the teaching profession. The modernised profession was intended to provide

good leadership, incentives for excellence, a strong culture of professionalism, and better support for teachers to focus on teaching to improve the image and status of the profession
(DfEE 1998: 6).

The reforms had three objectives:

- To promote excellent school leadership by rewarding our leading professionals properly
- To recruit, retain and motivate high quality classroom teachers by paying them more.
- To provide better support to all teachers and to deploy teaching resources in a more flexible way

(DfEE 1998: 6).

Achievement of these objectives was central to New Labour's reform agenda for schools. However, evidence gathered by the School Teachers' Review Body (STRB) that had commissioned surveys to examine teachers' workload in 1994, 1996 and 2000, revealed that there was growing concern about workload in the teaching profession and the impact this was having upon teacher morale. In February 2001 the STRB published a tenth report

recommending that the DfEE should commission an independent report to review teacher workload. This task was undertaken by PricewaterhouseCoopers (PwC 2001). It was after the findings of this report confirmed that teacher workload was overburdened that the STRB were asked to consider in detail teacher workload and conditions of service (STRB 2002, 2004).

The three objectives of the Green Paper were to have a wide ranging impact as successive government policies sought to implement the proposed reforms. The increased pay levels proposed for teachers were linked to a system of performance management and performance related pay and in 1998 the new advanced skills teacher posts were established. The framework of professional standards (TDA 2007) reflects the progression now expected (in England) as teachers develop knowledge, skills and understanding alongside their professional attributes. In this way, teachers' working lives are divided into career stages which are linked to performance management in schools. (The standards for Post Threshold Teachers, Excellent Teachers and Advanced Skills Teachers are pay standards and apply to England and Wales).

The professional standards underpin the five key outcomes for children in *Every Child Matters* (to be healthy; stay safe; enjoy and achieve; make a positive contribution; and achieve economic wellbeing) and the six areas of the Common Core of skills and knowledge for the children's workforce that everyone working with children should be able to demonstrate. The Common Core of Skills and Knowledge covers effective communication and engagement; child and young person development; safeguarding and promoting the welfare of the child; supporting transitions; multi-agency working; and sharing information. Included within the framework for professional standards are the Training and Development Agency for Schools (TDA) review of the standards for teaching assistants and the professional standards for higher level teaching assistants in consultation with social partners, key stakeholders and a review of leadership standards. The standards now range from those for initial teacher training and induction to the National Professional Qualification for Headship. Normally, teachers reach the point of Threshold Assessment after five years and up to that time their salary increases by yearly increments. Those teachers who meet the Threshold standards receive a performance related promotion and transfer to an upper pay spine. Four further increments can be awarded by school governors on the advice of headteachers.

Mahoney *et al* (2004) argue that this system transforms what was a national pay scale into one that is determined and managed locally. Their ESRC funded research project found that teachers experienced difficulties when Threshold was introduced because of the technology of the form and many teachers found the standards to be repetitive and unclear. However, head teachers had a much more positive view of the process and in terms of impact upon professional identity teachers who passed through the Threshold claimed it gave them a boost. Some research argues that the professional lives of teachers have been structured into a system of performance management where they are dependent upon external definitions of quality, progress and achievement for their success and where there is pressure, particularly for younger teachers, to comply with 'competency based agendas' (Day 2002: 677).

In the document *Time for Standards* (DfES 2002) reform was sought by the government linked to four principles: standards and accountability; devolution and delegation; flexibility and incentives and expanding choice. To achieve these principles there was to be investment which would ensure that:

1. Our pupils are supported by a wide range of teachers and other adults working flexibly and differentiating their approaches to meet pupils' needs; and pupils are developing their own learning skills
2. Our teachers are using effective approaches to teaching and learning, are working in teams with other teachers and support staff, are committed to their own development and confident in exercising their professional judgement; and have higher status, proper remuneration and incentives, more responsibility and autonomy, more support and a better work/life balance
3. Our support staff are recognised for their contribution to raising standards and have more opportunities to take on wider and deeper roles in support of teaching and learning, supported by the right training and new career paths, with numbers growing to deliver reform
4. Our Heads and leadership teams are committed to innovation, leading the change to new, more flexible ways of working, and to better teaching not just within their own schools, but in partnership with other schools and institutions and with their LEA, are ensuring an appropriate work/life balance for their staff; and are embracing leadership responsibilities in the wider community, and
5. Our schools are making world class provision, supported by world class teaching and world class ICT with well designed and equipped premises which can adapt to modern approaches to teaching and learning, and where there is flexibility over the length and size of individual lessons and the school day.

(DfES 2002: 4).

To test out the viability of the principles and aims of the proposed reforms the DfES commissioned the Transforming the School Workforce (TSW) Pathfinder project which was launched in 2002. The aim of this project, carried out by a team from the London Leadership Centre and led by Dame Pat Collarbone, was to discover ways of making significant reductions in the hours teachers worked and to increase the proportion of a teachers' time spent on teaching and teaching related activities. The aims were to be achieved through the provision of resources to support change in teachers working practices and covered several areas:

- Providing schools with consultancy support (school workforce advisors)
- Training headteachers in change management
- Allocating funds for employing additional support staff
- Providing ICT and software
- Funding the bursarial training of school managers; and
- Providing schools with capital resources

(Thomas *et al* 2004a: 1).

However, as Butt and Gunter (2005) report, although learning from the TSW Pathfinder schools was intended to be used to support remodelling in schools nationally from January 2004, the National Agreement (ATL *et al* 2003) was signed and remodelling in all schools instigated (DfES 2004b) before the end of the project and the publication of the TSW evaluation findings.

The National Agreement and the phases of workforce reform

The National Agreement was set up between the Government, employers and the school workforce unions. The Agreement promised joint action, designed to help every school in England and Wales to raise standards and tackle workload issues and included a seven point plan for creating time for teachers and headteachers which included: a reduction in teachers' hours; changes to teachers' contracts to ensure the aims set out in Time for Standards (DfES 2002) could be met; a concerted attack on unnecessary paperwork and bureaucratic

processes; reform of support staff roles to help teachers and support pupils; the recruitment of new managers including business and personnel managers; additional resources and national 'change management' programmes to help school leaders achieve the reforms; and monitoring of progress on delivery by signatories to the Agreement. Within the detail of the Agreement is a statement about strategies for managing cover, where it is stated:

high level teaching assistants will be able to cover classes, and should be able to ensure that pupils can progress with their learning, based on their knowledge of the learning outcomes planned by the classroom/subject teacher.

(ATL *et al*: 7).

This is one of the statements within the agreement that caused much controversy and debate among the teaching profession and elsewhere, as teachers were concerned that their job would be devalued if untrained staff were allowed to teach whole classes. Parents also raised concerns about the quality of staff who would be teaching their children. The statement in the Agreement was a key reason the NUT refused to sign up to the Agreement (Butt & Gunter 2005).

To help implement the reforms a Workforce Agreement Monitoring Group (WAMG), consisting of government, employers and unions, was set up alongside an Implementation Review Group (IRU), which consisted of practitioners, to review policy initiatives from a school perspective. Change in schools was to be introduced in three stages:

Phase 1 – 2003

- Promote reductions in overall excessive hours
- Establish monitoring group
- Establish new Implementation Review Group
- Routine delegation of 24 non-teaching tasks
- Introduce new work/life balance clauses
- Introduce leadership and management time
- Undertake review of use of school closure days

Phase 2 – 2004

- Introduce new limits on covering for teachers

Phase 3 – 2005

- Introduce guaranteed professional time for planning, preparation and assessment
- Introduce dedicated headship time
- Introduce new invigilation arrangements

(DfES 2004c).

The National Remodelling Team (NRT), set up in 2003 and initially based in the National College for School Leadership (NCSL), moved in 2005 to the Training and Development Agency for schools (TDA) in order to support the extended TDA role to oversee provision of advice and support to schools.

It has been argued (Butt & Gunter 2005) that remodelling has the potential to:

enable teachers and teaching to thrive in a reinvigorated public sector, where teachers can put emphasis on their core purpose of teaching, and work in productive networks with other adults to support learning. There is also the possibility that nothing much will change at all in relation to educational goals, and remodelling will be a make-over where the control of teachers and their work will remain outside of schools orchestrated by those at a distance from practice

(Butt & Gunter 2005: 135).

The NFER conducted an evaluation each year of the National Remodelling Team (Wilson *et al* 2005; Easton *et al* 2005). The third evaluation by the NFER (Easton *et al* 2006) was set up to examine the effectiveness and the impact of the NRT in completing the third phase of the remodelling programme. It also sought to explore the effectiveness of the NRT in applying its model, tools and techniques to the extended schools programme. Data was collected through questionnaire surveys of:

- All Local Education Authority Remodelling Advisers (RAs)
- All Extended Schools Remodelling Advisers (ESRAs)
- All Extended Schools Remodelling Trainers (ESRTs)
- All extended school pilot schools.

The second strand of the evaluation involved telephone interviews with LEA RAs, ESRAs, and ESRTs in all nine government regions in England. Case study visits also took place to schools involved in the pilot of the extended schools programme.

The extended schools pilot programme aims to trial the implementation of an extended service in and around schools by providing: high quality child care on the school site or through other local providers available ten hours a day from 8 am to 6 pm all year round and with supervised transport arrangements where appropriate; a varied programme of activities such as homework clubs, arts and music and enterprise activities; parenting support, particularly at key transition points; swift and easy referral to a wide range of specialist support services such as speech therapy and family support services; and wider community access to ICT, sports and arts facilities and adult learning.

Key findings from the evaluation in terms of the remodelling programme were that most schools were at the 'developing' stage (as defined by the NRT), although some schools had reached the sustainable stage. There was concern about the long-term sustainability of the programme as headteachers and teachers considered sustainability to be reliant on future funding. Successes of remodelling as far as teachers were concerned included the introduction of Planning, Preparation and Assessment (PPA) time, meeting the requirements of the National Agreement, introducing the change management process and flexible team working.

Progress with other initiatives was also being made, specifically with Every Child Matters (ECM). However, it was evident from the questionnaire responses that it was thought more could be done to link the different agendas and show schools how they interrelate. The positive aspects of the remodelling programme were considered to be the training and support provided by NRT and particularly the adaptability of the training materials to meet local demands.

Teachers and advisers involved in the extended schools pilot programme felt they needed additional support in networking and sharing examples of good practice and in improving the understanding of the agenda among school staff and other service colleagues and developing multi-agency working. The RAs and ESRAs considered the management change process to be flexible and fit for purpose although schools were less positive and ESRTs thought it was too early to comment. Overall, the work of the NRT was thought to be effective and to be having a positive impact upon schools and the local communities.

Leadership and managing change in schools

The management of change in schools is crucial to the successful implementation of the school workforce agenda and good leadership of that process essential for effective and smooth transitions to occur. The DfES was determined to make sure that every headteacher

would do more than 'run a stable school' and that leadership would be transformed. Such a transformation requires leadership that can:

- Frame a clear vision that engages the school community
- Motivate and inspire
- Pursues change in a consistent and disciplined way; and
- Understands and leads the professional business of teaching

To achieve their full potential, teachers need to work in a school that is creative, enabling and flexible. And the biggest influence is the Head. Every teacher is a leader in the classroom. Every Head must be the leader of these leaders. And the Head's greatest task is the motivation and deployment of their key resource staff.

(DfES 2003a: 20).

Headteachers were encouraged under the remodelling agenda to review how staff should be deployed in their schools, how the school day, week and year was organised and encouraged to be creative in the use of school space so that new opportunities in the community and with business were opened up. Rayner and Gunter's research (2005) draws on the TSW Project to provide examples of the way in which head teachers responded to the management of workforce change in schools. They argue that remodelling is being delegated to and within schools and that delegation is the reallocation from one role to another. Role definition becomes emphasised so that while there are clear role boundaries there is also optimism in terms of delegation that would develop the role. However, they also suggest such an approach to leadership does not recognise that:

remodelling grows out of how people think about and experience their practice, and how teachers strategically engage with the aims and what it means for them within their working and wider lives.

(Rayner & Gunter 2005: 153).

They argue that questions need to be asked about how remodelling is interpreted within schools and how teachers can 'accept, redefine and match' (Rayner & Gunter 2005: 155) the external definition of remodelling.

The TSW project evaluated the three official features of remodelling; the change plan, the change management team, and changes within the organisational culture. However, the research team also found within the data:

a discernible distributed practice associated with how people made sense of the relationship between professional practice and the work involved in the project.

(Rayner & Gunter 2005: 155).

The Project required all the schools taking part to produce a change plan that reflected the schools intention to reform and innovate practice and this required the wider workforce to work through often complex issues concerning purposes and practice. The change management team (CMT) was also an area that demonstrated distributed practice. Supported by an external School Workforce Adviser, schools were able to engage in thinking about opportunities afforded by the project. One primary school support staff member reported:

The management of the school has changed in a positive way the change management team has more positive ideas. Management has changed for the better, it is a more positive school. (Meadow School – Support Staff 1).

(Rayner & Gunter 2005: 156).

The third element that Rayner and Gunter researched is the disposition to discuss and develop practice in school. Within their case study data they found an increased flexibility and renewed trust. One senior manager in a primary school reported:

A mental shift in teachers was needed. They work long hours and are committed. Now because of the early opening of school we say: 'unless you need to be here, take your lap top and go' It is important to do this because our work never finishes, it is constantly in your head. (Meadow School – Senior Manager).

(Rayner & Gunter 2005: 156).

In their research they acknowledge that existing structural influences in the schools would also play a part in the change process and that sometimes the change idea might begin to work in ways that had not been envisaged. Occasionally, there were criticisms of the CMT in relation to the pace of change (this was largely due to external and political considerations forcing the pace) and that what came through clearly was how the Project required new and additional work in order for it to be successful. While in the short term, reductions in workload were achieved, they consider the implications for educational leadership to be much more far reaching.

As a key element of the Primary National Strategy, the Primary Leadership Programme (PLP) was set up in 2003. The PLP evaluation (Wade *et al* 2007) focussed on the aims of the programme to evaluate if they had been achieved. The aims of PLP were:

- To strengthen collaborative leadership and responsibility for teaching and learning in primary schools
- To equip leadership teams with a greater understanding of expectations in English and mathematics and the expertise needed both to identify where improvements should be made and to take appropriate steps towards bringing about these improvements
- To develop and extend the use of management tools to inform effective leadership and to contribute towards improvements in the teaching and learning of English and mathematics
- For participating schools to make significant improvements in Key stage 2 results in English and mathematics over the period 2004 to 2006.

(Wade *et al* 2007: 2).

The evaluation team interviewed key staff at ten case study schools, sent a large scale questionnaire survey to 1000, randomly selected leaders involved in the programme and used statistical evidence from the KS1 and KS2 results. The key findings showed that pupil attainment at KS2 improved, in teaching and learning there were improvements in data analysis, changes to teaching styles and the adoption of identified good practice. In the PLP schools there was a widening of leadership with change management teams increasing in size. Leadership was deemed to have improved with a more widely shared vision for the school and a sharing of responsibility with middle management. Many respondents indicated a stronger sense of team work and increased opportunities for collaboration with other schools. Inputs from the Primary Strategy Consultant Leaders (PSCSL) were viewed positively and many schools had improved their own monitoring and evaluation processes. While schools were doing their best to embed practice the project team found that schools were encountering difficulties with sustainability. These difficulties included time constraints, staff turnover, changing priorities and the importance of funding to enable meetings to take place. Recommendations emerging from the project included the need to maintain contact with the PCSL (or someone in a similar role) and there should remain a focus on distributed leadership as the sharing of responsibilities and a common vision shared across a number of staff was thought to work well.

Reshaping the workforce: teachers

Teachers' work and roles in primary schools had begun to change considerably even before the National Agreement was introduced in response to the curriculum and assessment reforms introduced at the end of the twentieth century. The impact that these early reforms

had upon primary teachers has been well documented in a number of research reports, for example impact upon teacher workload at Key Stage 1 (Campbell & Neill 1994a); impact upon primary teachers' work through the implementation of changes in curriculum and assessment (Campbell & Neill 1994b); teacher responses to escalating workloads and the new demands of their expanding roles (Webb & Vulliamy 1996); the changes that have taken place in teacher practice and links to professional ideology and personal practice in terms of curriculum, pedagogy and assessment (Pollard *et al* 1994; Alexander *et al* 1996, Osborne *et al* 2000, Galton *et al* 1999, Moyles *et al* 2003). More recently, research by Thomas *et al* (2004) on transforming the school workforce (TSW project); Blatchford *et al* (2006; 2007) on the deployment and impact of support staff in schools (DISS project); Webb and Vulliamy (2006) on the impact of policies on primary school teachers' work; Woodward and Peart (2005) on the role of the higher level teaching assistant; and Wilson *et al* (2007) on the impact of support staff who have achieved HLTA status is of particular relevance for this review as the research draws attention to the impact of the remodelling initiative in primary schools.

Much of this research has a wider remit than workforce reform or only focuses upon one element of it. As Gunter (2007) claims:

there is no robust research evidence regarding school and workforce experiences of this reform'

(Gunter 2007: 4).

and states that the main evidence base comes from the TSW project.

Transforming the School Workforce (TSW Project)

The TSW pilot project (Thomas *et al* 2004a) included thirty-two schools (4 special schools, 16 primary schools and 12 secondary schools) and nine comparator schools to compare change in these schools to the pilot schools. The project pilot schools were provided with consultancy support to give guidance in the management of change in schools and the schools were also asked to think radically about human and physical resources. Funds were provided to buy in additional support staff and to obtain hardware and software so that all teachers had access to a laptop computer. There was also access to training for certain groups of staff including teaching assistants. According to Thomas *et al* (2004b) these elements would contribute to the pattern of change in the working practices of those employed in schools allowing the aims of remodelling to be fulfilled.

The teachers in the TSW project identified five areas that were problematic for them and created excessive workload. These included too much bureaucracy and paperwork, planning, government initiatives, unrealistic targets and discipline in schools. Teachers across all sectors stated the single most effective solution would be the employment of more support staff and additionally more non-contact time; reduction in paperwork; development of ICT and smaller classes. The study also reported that a case study of a cluster of four primary schools revealed a dominant focus for change was remodelling (although this covered a number of initiatives). These schools gave examples of not only appointing more support staff but also of changing the roles and status of such staff. The project team concluded that (at that time) there was no signal that teaching assistants would be appropriately rewarded in terms of improved salary and that greater attention needed to be paid to the training of teachers in the coordination of teaching assistants. More recently Gunter (2007) reported that the TSW project found:

that interventions that are now known better as Remodelling led to teachers reporting a reduction in their workload, change in culture and a better work-life balance, and they had begun to develop the role of support staff. However, the research also found that the changes

needed substantial and sustained funding, and that reform is itself a time hungry process that adds to the burden of senior staff in particular.

(Gunter 2007: 6).

The evaluation also found variation in the way that remodelling strategies were developed in different schools so that whereas one school reported a reduction in workload hours by 13 hours per week, another school reported a two hour increase in time spent on work per week. It would appear that the way in which strategies are developed within the local context is of key importance for remodelling in schools.

The findings from the TSW project concluded that an impact had been made in reducing teachers' working hours and there was a shift in role boundaries between teachers and other members of the school workforce enabling more effective support. The project research brief commented

The schools give examples of appointing more support staff but, more importantly, changing the roles of many support staff and raising their status. It is apparent that support staff became a more visible and important part of school communities.

(Thomas *et al* 2004a).

The resource that increased ICT in schools had been beneficial, but the project concluded that levels of training and support in this area were not matched with the resources. The project authors were also concerned about the sustainability of several of the initiatives that had been supported by additional funding without the continuation of these funds.

In terms of workload, teachers reported a reduction in hours worked and there was evidence of reduction in time devoted to tasks that could be done by others. The project report revealed there was a relationship between decline in hours and positive views among teachers on the quality of leadership, decision making and change management in primary schools. A consistent relationship was also identified between good quality ICT training and support and reduction in hours.

Research on the impact on teachers of New Labour's policies

The first report on the impact of New Labour's education policies on primary school teachers' work (Webb & Vulliamy 2006a) focuses upon the effects on primary teachers' attitudes, values and experiences and their perceptions of the changes in their roles and responsibilities over the last decade. To conduct their research they used a condensed fieldwork qualitative research strategy that involved classroom observation, teacher interviews and the collection of documentation from day long visits to 50 schools in 16 local education authorities throughout England (most of these schools formed the research sample for their earlier report in the early nineties). The fieldwork took place over three years between 2003 and 2006 and in total 188 teacher interviews were recorded and transcribed. The analysis of the interviews was based upon the 'constant comparison' method advocated originally by Glaser and Strauss (1967). As in previous research such as Day (2002) and Osborne *et al* (2000) differences have been found in teachers' responses from those who entered teaching before the 1988 Education Reform Act and those who entered afterwards, the project authors took note of those teachers who trained before 1990 (68 per cent) and those who trained after that date (32 per cent). In terms of assessing the outcomes of this project it is relevant to note that the teacher sample were drawn from experienced teachers who were often the most confident teachers in a school.

The data from the project provided research evidence of teachers' perceptions of the National Literacy and Numeracy Strategies (NLS and NNS); targets, testing and assessment; the impact of ICT; the role of teaching assistants; the primary national strategy and changing classroom practice. The project found that there were many criticisms of the NLS but that in

contrast, apart from a few caveats, the NNS 'received overwhelming support' (Webb & Vulliamy 2006: 5). Overall, the strategies were viewed positively by the primary workforce because they provided continuity and structure although teachers were very critical of the way they were imposed in schools and the implication that the government lacked trust in the teaching profession. The consequence of this was a lowering of teacher morale and reduced teacher self confidence and there was also resentment of the pressure to comply with the strategies from the LEA and Ofsted. Schools also found several ways to adapt the strategies to suit the needs of the children or take account of the strengths and weaknesses of the teaching staff. Overall though, and as a result of teaching methods promoted by the strategies, teachers considered that the methods had 'greatly improved the quality of their teaching' (Webb & Vulliamy 2006a: 5)

In terms of targets, testing and assessment the findings showed that staff in schools felt an 'unremitting pressure' to achieve the governments national literacy and numeracy targets and they described how this pressure was passed on to pupils. This still proved to be the case even though ministers told schools in 2003 they could set their own targets at KS2 as the headteachers in the research survey sample were still expected to fit in with LEA predictions. The report states:

teachers held an overwhelmingly negative view of SATs and would like to see them abolished.

(Webb & Vulliamy 2006a: 6).

The majority of headteachers, however, did not hold this view as they considered the tests necessary to drive up standards, but they were all highly critical of performance tables and the problems associated with value added versions of these tables. The use of ICT aided schools in the collection and evaluation of their own data and analysis of the strengths and weaknesses in the coverage of literacy and numeracy. However, the report considered that judgements were being made about the performance of teachers according to their ability to enable pupils to meet attainment targets. A similar difference of perspective on SATs, between teachers and headteachers, emerged from the Primary Review Community Soundings witness sessions in nine regional locations during 2007 (Primary Review 2007: 28).

ICT use in the 50 schools was reported as having increased dramatically with the development of ICT suites and the installation of interactive whiteboards in classrooms. These developments, it was considered, had an impact on teachers and in turn classroom pedagogy by promoting whole-class teaching as the majority of teachers stood at the side of the whiteboard and talked to the whole class. Technical problems with ICT were reported as the most frustrating issue creating pressure for ICT coordinators. Teacher use of ICT for both personal and professional use and the potential it holds for teaching and learning was improved in those schools that had been able to provide personal laptops and there was increasing awareness about how to teach children and alert parents to the risks for children of using the internet.

Reshaping the workforce: teaching assistants

The dramatic increase in support staff in schools lies at the heart of the government plans for a modernised workforce. Vincett *et al* (2005) reported that by 2004 there were 133,440 full-time equivalent teaching assistants working in mainstream primary schools and Pupil Referral Units in England and the DfES statistics indicated there was a ratio of 2.08 teaching assistants to every teacher (DfES 2004c). By 2007, total numbers of full-time equivalent support staff had risen to 305,600 and of that number 163,000 were teaching assistants working in the LA maintained sector. In primary schools, 105,800 teaching assistants and 57,400 other adults were employed (DCSF 2007). Research into the roles and relationships of

Key Stage 1 teachers and classroom assistants (Moyles 1997) urged greater involvement of teaching assistants in lesson planning and finding time to share knowledge so that better support could be provided for children. Ofsted (2002) concurred with this view stating that while teachers valued the additional support more time had to be spent in planning and preparation. They also noted the role that teaching assistants might play in curriculum enrichment contributing to both curriculum quality and breadth. Usually, however, they found that teaching assistants were used to support the literacy hours, mathematics or to support children with special needs. This is confirmed by the research findings of Hancock and Eyres (2004) who suggest teaching assistants had been assigned a 'remedial' role in the teaching of literacy and numeracy and yet were barely visible in the reports that evaluated the implementation of the literacy and numeracy strategies (Earl *et al* 2000, 2001, 2003).

The TSW Pathfinder project picked up on a number of issues relating to role definition, job specification and the development of skills for teaching assistants to carry out the work assigned to them (Butt & Lance 2005). In the project there was a major focus on expenditure to provide support for teachers through the employment and deployment of teaching assistants. Questionnaire and interview data from the 32 schools studied and the in-depth case study material revealed that teachers thought the teaching assistant role was an important one, and 78 per cent of primary teachers surveyed agreed that teaching assistants needed more training. The effective use of teaching assistants in schools and classrooms appeared to change considerably between 2002 and 2003, with 43 per cent of teachers considering teaching assistants were under-used in 2002. By 2003, 87 per cent of teachers agreed employing a teaching assistant allowed them more time to teach. The teaching assistants surveyed in the project were found to be broadly satisfied with their role, well motivated and positive about the ways they were being led and managed. The researchers surmised that, as a workforce, such a positive group might welcome changes in their roles and responsibilities if accompanied by appropriate recognition and remuneration.

Webb and Vulliamy (2006a) reported that, in terms of the recent expansion in teaching assistants in response to the government's workforce agenda, the number of adults working in the school community had increased considerably. Teaching assistants were perceived as 'promoting pupil's self-esteem, motivation and achievement' (Webb & Vulliamy 2006b: 9, Report summary) and many teachers regarded the teaching assistant as crucial to their effective management of pupils and teaching. The research found that by 2004 most schools had strategies in place to relieve teachers of the 24 administrative tasks cited in the workload agreement. However, it appeared that not all teachers took full advantage of these, preferring to use additional teaching assistant time to support children. This point coincides with the TSW finding that there was no systematic relationship between job satisfaction and hours worked. These findings suggest that moving a particular type of work from teachers to support staff might move the administrative/bureaucratic burden elsewhere but may not necessarily motivate teachers who place more emphasis on enjoying their job and caring for their pupils (Thomas *et al* 2004b). A modest reduction in workload may not necessarily enhance job satisfaction and bring the corresponding hoped for improvement in recruitment and retention (Butt *et al* 2005).

Webb and Vulliamy's research (2006a) found that most teachers disagreed completely with the notion that teaching assistants should take whole classes on a regular basis to provide planning, preparation and assessment time (PPA), and in only 6 schools out of their whole sample were teaching assistants used in this way. In these 6 schools the use of teaching assistants for PPA time was dependent upon one or more teaching assistants achieving higher level teaching assistant (HLTA) status. The researchers reported that the increasing numbers of teaching assistants in schools and classrooms required teachers to develop new

skills in cooperation, delegation and mentoring. Workforce remodelling was viewed as both a threat to teacher professionalism and as a means of enhancing it by opening up new possibilities.

Deployment and Impact of Support Staff in Schools (DISS) project

The Deployment and Impact of Support Staff in Schools (DISS) project is providing comprehensive information on support staff in England and Wales over a five year period (2003-8). Results from Strand 2 Wave 1 focus specifically on the Impact of the National Agreement (Blatchford *et al* 2008). It describes findings on the deployment of all categories of support staff; the impact of support staff upon teachers and teaching and pupil learning and behaviour; and the impact of the National Agreement on pupils, teachers and support staff. The research methods included a survey in a sample of 76 schools (out of this, 33 Year 1 and 22 Year 3 were sampled), a systematic observation component and a case study component was carried out in 49 schools (this included 20 primary, 4 infant and 1 junior school in England, and 2 primary schools in Wales). In terms of deployment of support staff in primary schools, the research findings showed that the most common activity was working with a group of pupils. It also showed that all pupils seemed to benefit from support staff presence in terms of more individualised attention for pupils and more active pupil role interaction with adults, leading the research team to conclude that the presence of support staff is of particular benefit in improving the attention of children in most need. However, active interactions with teachers were reduced as more time was spent interacting with the support staff. The impact of support staff on pupils' approach to learning was shown to be most positive for the youngest age group in the study (Year 1).

As with Webb and Vulliamy's and Thomas' research, the 25 tasks cited in the National Agreement had largely been transferred to support staff. While some tasks were being retained by teachers for pragmatic and/or professional reasons, overall teachers reported an improvement in their work-life balance since the introduction of Preparation, Planning and Assessment (PPA) time. Cover for absent teachers was found to be done mainly by support staff. However while these were perceived as advantageous by teachers, they had gained responsibility for their day-to-day deployment, line management and performance reviews, all tasks which were more demanding in terms of skills than the mainly administrative tasks removed by the National Agreement. Improvements in pupil behaviour, attitudes and attainment was a broad aim of the National Agreement but the research team found little hard evidence to support the achievement of this aim as:

most of the evidence available was indirect, impressionistic and consequently hard to interpret. The view in schools was that support staff did have an impact on pupil attainment, behaviour and attitudes; the problem the headteachers faced was proving it.

(Blatchford *et al* 2008: 13).

Findings in terms of class-based support staff indicated that some worked in excess of their paid time as they became involved in planning and preparation with the teachers with whom they worked. The expanded role was welcomed by many but was not often matched with higher rates of pay, increased hours of paid work, inclusion in meetings and decision making, or opportunities for training in preparation for their new roles. The research team commented:

In practice, the good will of the support staff was indispensable in making the policy work.

(Blatchford *et al* 2008: 13).

Many of the findings in these research projects were confirmed by Ofsted (2007) in their report on reforming and developing the school workforce. Their main findings reported positively on the way most schools had met the statutory requirements resulting in a

revolutionary shift in workforce culture with clear benefits to staff and pupils. Headteachers and teaching staff that had understood the principles underlying workforce reform had planned a coherent strategy, managed the changes well and implemented other initiatives successfully. A key principle of the National Agreement to provide time for teachers to focus on teaching and learning had been realised in nearly all schools. There had also been significant progress in terms of use of ICT for administration, teaching and learning. However, Ofsted were critical that many schools visited had not clearly understood messages from the Government and external agencies about the desired outcomes of workforce reform as a means to improve the quality of education and raise standards. Most schools had not monitored and evaluated the impact of the reforms on pupil learning and had little firm evidence to show that standards were rising as a result. Slow progress was being made on making time for strategic leadership and management and dedicated time for headship, because the requirements were not clearly understood. The full potential of the wider workforce in raising achievement and standards was not realised when headteachers and leadership teams did not match skills and expertise sufficiently closely to staff and pupil needs and when insufficient attention was given to the performance management and career development of the workforce. Performance management of the wider workforce was not consistent as it was not always clear who should be conducting the performance review and how evidence would be collected.

Other countries and workforce reform: comparative evidence

Workforce reform in other UK countries, for example Scotland, and elsewhere in the world may deepen our understanding of what is happening in the English context. Ozga (2005), drawing on evidence from the Education Governance and Social Inclusion and Exclusion in Europe (EGSIE) project, which compared nine European countries and Australia, focuses on the form that modernisation of the teaching workforce is taking in Scotland. Unlike England, which has focussed on a business model of best practice, Scotland has offered a 'revived public service partnership model of governance combined with new elements of public consultation and democratisation' (Ozga 2005: 209). Significant differences in Scotland hinge around the curriculum as Scotland has a national framework and not a national curriculum (and no Ofsted); there are differences in devolved school management, in qualification frameworks and in performance measurement which is based on school self evaluation. These differences shape the policy framework within which the workforce operates and the way the teaching profession defines itself.

The McCrone inquiry into teachers' pay and conditions of service in 1997 resulted in a report (SEED 2000) with complex recommendations. The Scottish executive group, set up to implement the recommendations, produced the Agreement (SEED 2001) which resulted in considerable changes to the teaching profession in Scotland. In particular, salary was increased and teachers' contact hours reduced through the introduction of a 35 hour working week. A new career structure with only four levels across both primary and secondary schools was developed, consisting of teacher, senior teacher, management grade and headteacher and there were also new arrangements for professional development. A Chartered Teacher status offered recognition of excellence in teaching for those teachers who did not wish to become managers. To obtain Chartered Teacher status, teachers must follow a four-year programme of enquiry and research structured around professional values, professional knowledge, professional and personal attributes leading to professional action. Such a programme of professional development leads not only to Chartered Teacher status but also to the award of a Masters' degree.

Menter *et al* (2004), drawing on their ESRC research project 'The Impact of Performance Threshold Assessment on Teachers' Work', contrast the policy issues underlying the

Chartered Teacher programme and the Threshold Assessment in England. They focus on three areas: the problems lying behind the policy initiatives; the values and motivations underlying the policies and the processes of development and implementation. The differences they identify in relation to each area are that the Scottish approach anticipates commitment while the English approach expects to motivate through incentives. Second, while each approach involves a stepped progression up the teacher career ladder in Scotland this is characterised as a series of achievements while in England:

with the notable exception of the National Professional Qualification for Headship (NPHQ), they are rather a series of 'hoops and hurdles' through or over which teachers are judged at each stage to have jumped (or not).

(Menter *et al* 2005: 205).

And third, they identify the very different approaches to implementation where in Scotland ownership of the policy process was broadened through serious attempts to discuss and negotiate at all levels and the involvement of the major teachers' union on the McCrone Committee. Unions and the GTCs had a major influence on the report produced which established an induction year and an entitlement to CPD as an alternative to an appraisal based system. In England the extensive involvement of the private sector and the different role played by the union 'as negotiators of procedural justice' (Menter *et al* 2005: 208) who work in partnership to provide guidance for teachers on how to apply to cross the 'Threshold' are examples of the differences in the process of implementation. Another significant difference is the role HMI play. In England they have 'become detached from the policy process' (Menter *et al* 2005: 209) while in Scotland they still have an influence upon policy development and implementation. In addition, the Scottish GTC, established in 1965, has considerable influence and power in education in Scotland whereas the English GTC was only set up in 1999 and has neither the influence nor the power of its Scottish counterpart.

While additional classroom assistants have been employed in classrooms in Scotland there are specific guidelines which ensure that the roles and responsibilities of teachers and assistants remain separate. In the Scottish context, teaching assistants only undertake tasks which do not arise directly from the process of teaching and learning (GTCs 2003) and this is a clear and distinct difference in the way classroom assistants are deployed when compared to the English context.

Another international context that provides interesting comparisons with England is that of the United States, a decentralised system where under the American Constitution the 50 states have control of educational funding and major aspects of policy, and many key decisions are devolved even further, to individual school boards. Each state department of education distributes funds which account for about 50 per cent of school funding and implements and interprets state laws on matters such as curriculum and assessment and certification. Within each state, district school boards and superintendents of schools are responsible for hiring teachers, maintaining school buildings and determining the curriculum within the state guidelines. There is no national curriculum or national assessment system, though these matters are subject to increasing intervention at state level, and the federal government can exert leverage through the distribution or withholding of substantial funds for earmarked support initiatives. Alexander (2001) comments that:

in the United States the last two decades of the twentieth century marked increased levels of state and federal intervention in educational matters. Nevertheless, the American system remained firmly rooted in the local community while in England the national government seized control, tightened it, and tightened it still further

(Alexander 2001: 107).

However, there has been much concern about educational standards and achievement of pupils and in 2001 the *No Child Left Behind Act* (NCLB) was introduced. This Act places a requirement upon all schools and school districts that receive Title-1 federal funding to have a set of standards for improving student achievement, and detailed plans showing how these standards will be monitored and met. For the first time, testing was linked with school accountability. The Title 1 funding is distributed to approximately 90 per cent of school districts in the US (Smith 2005). Each state has now to assess performance annually in Grades 3-8 in language, arts, literacy and mathematics and in science. States were also to indicate how schools and school districts would demonstrate Adequate Yearly Progress (AYP) by 2014 and make their results public. While the Act is intended to make sure schools pay attention to all pupils, and specifically those groups who have consistently underperformed, it has been highly controversial among teachers and educationalists. Smith's (2005) research found that despite the equitable intent:

some commentators fear that the high stakes testing and accountability-linked sanctions that underpin the Act could result in many otherwise successful schools being labelled as failing
(Smith 2005: 507-8).

Educationalists in the US have argued that since the introduction of the NCLB Act there are now competing visions of the public education system. For example, Nieto and Johnson (2008) comment:

In spite of its limitations, the one thing that had been true of public education until now is that it largely was viewed as a beacon of hope by poor people, who saw it as the only option their children had. For many generations, public schools offered children of poverty-stricken and immigrant populations the opportunity to move into the mainstream of American society
(Nieto & Johnson 2008: 17).

The teaching profession in the US faces challenges in terms of implementing the NCLB, and this challenge is increased when the composition and distinctiveness of the teacher labour market is taken into account. Teachers are nearly all graduates, largely female, highly unionised and working in non-profit settings (Belfield 2005). Belfield argues that reforms to the teaching profession will not be effective in a rigidly controlled school system. The NCLB stipulates that there should be a qualified teacher in every classroom and some states are pressing for reduced class sizes in all their schools. These requirements are only possible to meet if there is a large additional supply of teachers at current wage levels. He argues that there is no evidence that such a supply exists and that:

even where there is strong evidence on the relative ineffectiveness of uncertified, out-of-field teachers, there is no mechanism by which these teachers are replaced by certified teachers with a college degree in their field of instruction.

(Belfield 2005: 176).

The teacher perspective of the NCLB is also explored by Baghban and Li (2008), who argue that certified teachers now feel unable to use their full teaching skills:

The practice that rankles teachers the most is the administration's imposition of highly scripted programmes that tell them exactly what to do and what to say; in short, not just what, but how, to teach. All teachers in New York State go through a rigorous certification process, which is one of the most demanding in the nation. All are holders of masters' degrees in their field of specialization and many continue onto postgraduate work. Yet, the rigid nature of New York city's mandated math and literacy programmes does not allow teachers to draw on their knowledge of child development, theories of cognitive awareness and affective behaviour, or learning styles and multiple intelligences. Nor are teachers able to respond to

the needs, strengths, and weaknesses of the child as an individual. Rather, teachers are required to read verbatim from a scripted, prepared lesson and regurgitate it for the entire class.

(Baghban & Li 2008: 108).

Those who do support the NCLB consider it to be 'landmark legislation demonstrating the governments' commitment to educating underserved students and closing the achievement gap' (O'Day 2008). From whatever perspective the NCLB is viewed, there are clear comparisons to be made with the UK in terms of the introduction of the literacy and numeracy strategies, testing and the publication of league tables.

Conclusion

The research into educational policies and workforce reform presented in this review has raised issues around headteachers and the management of remodelling linked to workforce and curricular changes in primary schools, teachers' workload, and teaching assistants and their deployment in classrooms. While problems have been identified in several of the research studies, some of these are related to the number of policies and speed at which schools have had to implement them since 2002 – causing initiative fatigue amongst teachers in some cases. However, the overall perspective of teachers presented in the research reports is a positive one. At the beginning of this review the context in which the reforms were introduced and the objectives set out in the Green Paper, *Teachers: meeting the challenge of change* were presented. So how far have the three objectives set out in the Green Paper been achieved, and what has research had to say about the implementation of those objectives?

The first objective aimed to promote excellent leadership by rewarding leading professionals properly. A system of performance management and performance-related pay has been implemented and there are now professional standards linked to every level in the different career stages for headteachers, teachers and teaching assistants. Research indicated that the new pay structure initially caused problems for some experienced teachers, who felt they were required to 'prove' their professional knowledge and skills all over again, and how deeply this was felt very often depended upon the way in which headteachers dealt with the process of implementation in their schools. Other teachers found the pay structure gave them something to aim for and received a boost when they achieved the new pay level through the linked standards. Headteachers generally held a more positive view of the process, and the researchers claim that there was considerable evidence that a system of performance management linked to further professional development was welcomed by both teachers and managers (Mahoney *et al* 2004).

The second objective of the Green Paper was to recruit, retain and motivate high quality classroom teachers by paying them more. Research indicated that there was no systematic relationship between pay, hours worked and job satisfaction (Gunter 2005; Webb & Vulliamy 2006). What motivated teachers more was enjoying their job and caring for their pupils. How teachers and teaching assistants engaged strategically with the aims of remodelling and changes in role definition and what it meant for them within their working and wider lives was thought to be of more relevance. Research into leadership and management (Thomas *et al* 2004; Rayner & Gunter 2005) linked to remodelling (Easton *et al* 2005) revealed there was a move towards innovation and role change, and that a diversity of initiatives had been developed revealing several forms of distributed leadership. Overall, leadership was thought to have improved with a sharing of responsibility with middle management. Reductions in workload were achieved, but a new and additional workload was created to carry out the remodelling agenda. Changes to teaching style and the adoption of good practice were noticeable in some schools and there was a stronger sense of flexible teamwork and increased collaboration with other schools. While there was occasional criticism from

teachers of the change management team in schools at the pace of change, they recognised that this was largely due to external and political considerations driving the remodelling programme.

Research that focussed upon the remodelling teams found that most schools are still at the 'developing stage' and that only a few had reached the 'sustainable' stage. There was concern that future sustainability of workforce change in schools was reliant on future funding for additional teaching assistant posts. However, the introduction of PPA time to meet the requirements of the National Agreement and the change management process were thought to be successful by teachers and headteachers. Progress was being made with the Every Child Matters agenda, although the research found that more needed to be done to link the different agendas and show schools how they interrelated. An area that teachers still found stressful was the unremitting pressure to achieve the government literacy and numeracy targets.

The third objective was to provide better support to all teachers and to deploy teaching resources in a more flexible way. The increase in the numbers of teaching assistants and other staff in schools is significant, almost doubling the numbers of adults working in a school in some cases. Teaching assistants were found to be broadly satisfied with their role, well-motivated and positive. Teachers now regarded teaching assistants as crucial to the effective managing of teaching and learning, although most thought that teaching assistants should not be used to cover whole classes on a regular basis to provide PPA time (Webb & Vulliamy 2006a). Teacher use of ICT for both personal and professional reasons had improved considerably, and some research identified improvement in terms of pupil attainment at Key Stage 2 and improvement in data analysis to support teaching and learning. However, some evidence showed teachers and headteachers had not evaluated the changes made through remodelling.

A number of areas emerge which would benefit from further research, including those that can be drawn from the comparison with Scotland and the USA. Models of leadership revealed change had been implemented in a variety of ways and that distributed practice opened up new possibilities for educational leadership. Further research into how teachers have generated a shared understanding of practice would be useful. The changing role of teachers and teaching assistants, and the blurring of boundaries between these roles, is also a fruitful topic for further investigation. In particular, much greater attention needs to be paid in the training of teachers to the coordination of teaching assistants in classrooms and the mentoring of teaching assistants in schools. The Scottish context provides a comparison with the way teacher professional development and career progression is bound together in a more collegial system through the Chartered Teacher programme, and it will be interesting to see how the new Masters in Teaching and Learning in England will be perceived by teachers. Research into the management of workforce reform in primary schools demonstrates that there have been both difficulties and successes in terms of achieving the remodelling agenda, and the overall picture is one of teachers trying to make sense of a plethora of initiatives and turn policy into understandable practice.

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APPENDIX 1

THE PRIMARY REVIEW PERSPECTIVES, THEMES AND SUB THEMES

The Primary Review's enquiries are framed by three broad perspectives, the third of which, primary education, breaks down into ten themes and 23 sub-themes. Each of the latter then generates a number of questions. The full framework of review perspectives, themes and questions is at www.primaryreview.org.uk

The Review Perspectives

- P1 Children and childhood
- P2 Culture, society and the global context
- P3 Primary education

The Review Themes and Sub-themes

- T1 Purposes and values**
 - T1a Values, beliefs and principles
 - T1b Aims
- T2 Learning and teaching**
 - T2a Children's development and learning
 - T2b Teaching
- T3 Curriculum and assessment**
 - T3a Curriculum
 - T3b Assessment
- T4 Quality and standards**
 - T4a Standards
 - T4b Quality assurance and inspection
- T5 Diversity and inclusion**
 - T5a Culture, gender, race, faith
 - T5b Special educational needs
- T6 Settings and professionals**
 - T6a Buildings and resources
 - T6b Teacher supply, training, deployment & development
 - T6c Other professionals
 - T6d School organisation, management & leadership
 - T6e School culture and ethos
- T7 Parenting, caring and educating**
 - T7a Parents and carers
 - T7b Home and school
- T8 Beyond the school**
 - T8a Children's lives beyond the school
 - T8b Schools and other agencies
- T9 Structures and phases**
 - T9a Within-school structures, stages, classes & groups
 - T9b System-level structures, phases & transitions
- T10 Funding and governance**
 - T10a Funding
 - T10b Governance

APPENDIX 2

THE EVIDENTIAL BASIS OF THE PRIMARY REVIEW

The Review has four evidential strands. These seek to balance opinion seeking with empirical data; non-interactive expressions of opinion with face-to-face discussion; official data with independent research; and material from England with that from other parts of the UK and from international sources. This enquiry, unlike some of its predecessors, looks outwards from primary schools to the wider society, and makes full though judicious use of international data and ideas from other countries.

Submissions

Following the convention in enquiries of this kind, submissions have been invited from all who wish to contribute. By June 2007, nearly 550 submissions had been received and more were arriving daily. The submissions range from brief single-issue expressions of opinion to substantial documents covering several or all of the themes and comprising both detailed evidence and recommendations for the future. A report on the submissions will be published in late 2007.

Soundings

This strand has two parts. The *Community Soundings* are a series of nine regionally based one to two day events, each comprising a sequence of meetings with representatives from schools and the communities they serve. The Community Soundings took place between January and March 2007, and entailed 87 witness sessions with groups of pupils, parents, governors, teachers, teaching assistants and heads, and with educational and community representatives from the areas in which the soundings took place. In all, there were over 700 witnesses. The *National Soundings* are a programme of more formal meetings with national organisations both inside and outside education. National Soundings A are for representatives of non-statutory national organisations, and they focus on educational policy. National Soundings B are for outstanding school practitioners; they focus on school and classroom practice. National Soundings C are variably-structured meetings with statutory and other bodies. National Soundings A and B will take place between January and March 2008. National Soundings C are outlined at 'other meetings' below.

Surveys

30 surveys of published research relating to the Review's ten themes have been commissioned from 70 academic consultants in universities in Britain and other countries. The surveys relate closely to the ten Review themes and the complete list appears in Appendix 3. Taken together, they will provide the most comprehensive review of research relating to primary education yet undertaken. They are being published in thematic groups from October 2007 onwards.

Searches

With the co-operation of DfES/DCSF, QCA, Ofsted, TDA and OECD, the Review is re-assessing a range of official data bearing on the primary phase. This will provide the necessary demographic, financial and statistical background to the Review and an important resource for its later consideration of policy options.

Other meetings (now designated National Soundings C)

In addition to the formal evidence-gathering procedures, the Review team meets members of various national bodies for the exchange of information and ideas: government and opposition representatives; officials at DfES/DCSF, QCA, Ofsted, TDA, GTC, NCSL and IRU; representatives of the teaching unions; and umbrella groups representing organisations involved in early years, primary education and teacher education. The first of three sessions with the House of Commons Education and Skills Committee took place in March 2007. Following the replacement of DfES by two separate departments, DCSF and DIUS, it is anticipated that there will be further meetings with this committee's successor.

APPENDIX 3

THE PRIMARY REVIEW INTERIM REPORTS

The interim reports, which are being released in stages from October 2007, include the 29 (initially 30) research surveys commissioned from external consultants together with reports on two of the Review's many public consultations: the community soundings (87 regional witness sessions held during 2007) and the submissions received from organisations and individuals in response to the invitation issued when the Review was launched in October 2006. The research surveys are listed below by Review theme, not by the order of their publication. Once published, each report, together with a briefing summarising its findings and overviews and press releases for each group of reports, may be downloaded from the Review website, www.primaryreview.org.uk.

REPORTS ON PUBLIC CONSULTATIONS

Community soundings: the Primary Review regional witness sessions.

Submissions received by the Primary Review.

REPORTS ON THE SURVEYS OF RESEARCH AND OTHER PUBLISHED EVIDENCE

THEME 1: PURPOSES AND VALUES

- 1/1 *Aims as policy in English primary education*, by John White, University of London Institute of Education.
- 1/2 *Aims and values in primary education: England and other countries*, by Maha Shuayb and Sharon O'Donnell, National Foundation for Educational Research.
- 1/3 *Aims for primary education: the changing national context*, by Stephen Machin and Sandra McNally, University College London and London Schools of Economics and Political Science.
- 1/4 *Aims for primary education: changing global contexts*, by Hugh Lauder, John Lowe and Rita Chawla-Duggan, University of Bath.

THEME 2: LEARNING AND TEACHING

- 2/1a *Children's cognitive development and learning*, by Usha Goswami, University of Cambridge, and Peter Bryant, University of Oxford.
- 2/1b *Children's social development, peer interaction and classroom learning*, by Christine Howe and Neil Mercer, University of Cambridge.
- 2/2 *Primary teaching and teachers*, by Robin Alexander and Maurice Galton, University of Cambridge.
- 2/4 *Learning and teaching in primary schools: insights from TLRP*, by Mary James and Andrew Pollard, University of London Institute of Education.

THEME 3: CURRICULUM AND ASSESSMENT

- 3/1 *Curriculum and assessment policy: England and other countries*, by Kathy Hall, National University of Ireland, and Kamil Øzerk, University of Oslo.
- 3/2 *The trajectory and impact of national reform: curriculum and assessment in English primary schools*, by Dominic Wyse, University of Cambridge, and Elaine McCreery and Harry Torrance, Manchester Metropolitan University.
- 3/3 *Primary curriculum futures*, by James Conroy, Moira Hulme and Ian Menter, University of Glasgow.
- 3/4 *The quality of learning: assessment alternatives for primary education*, by Wynne Harlen, University of Bristol.

THEME 4: QUALITY AND STANDARDS

- 4/1 *Standards and quality in English primary schools over time: the national evidence*, by Peter Tymms and Christine Merrell, University of Durham.

4/2 *Standards in English primary education: the international evidence*, by Chris Whetton, Graham Ruddock and Liz Twist, National Foundation for Educational Research.

4/3 *Quality assurance in English primary education*, by Peter Cunningham and Philip Raymont, University of Cambridge.

THEME 5: DIVERSITY AND INCLUSION

5/1 *Children in primary education: demography, culture, diversity and inclusion*, by Mel Ainscow, Alan Dyson and Frances Gallanaugh, University of Manchester, and Jean Conteh, University of Leeds.

5/2 *Learning needs and difficulties among children of primary school age: definition, identification, provision and issues*, by Harry Daniels and Jill Porter, University of Bath.

5/3 *Children and their primary schools: pupils' voices*, by Carol Robinson, University of Sussex, and Michael Fielding, University of London Institute of Education.

THEME 6: SETTINGS AND PROFESSIONALS

6/1 *Primary schools: the built environment*, by Karl Wall, Julie Dockrell and Nick Peacey, University of London Institute of Education.

6/2 *Primary schools: the professional environment*, by Liz Jones, Andy Pickard and Ian Stronach, Manchester Metropolitan University.

6/3 *Primary teachers: initial teacher education, continuing professional development and school leadership development*, by Olwen McNamara and Rosemary Webb, Manchester University, and Mark Brundrett, Liverpool John Moores University.

6/4 *Primary workforce management and reform*, by Hilary Burgess, Open University.

THEME 7: PARENTING, CARING AND EDUCATING

7/1 *Parenting, caring and educating*, by Yolande Muschamp, Felicity Wikeley, Tess Ridge and Maria Balarin, University of Bath.

THEME 8: BEYOND THE SCHOOL

8/1 *Children's lives outside school and their educational impact*, by Berry Mayall, University of London Institute of Education.

8/2 *Primary schools and other agencies*, by Ian Barron, Rachel Holmes and Maggie MacLure, Manchester Metropolitan University, and Katherine Runswick-Cole, University of Sheffield.

THEME 9: STRUCTURES AND PHASES

9/1 *The structure of primary education: England and other countries*, by Anna Riggall and Caroline Sharp, National Foundation for Educational Research.

9/2 *Classes, groups and transitions: structures for teaching and learning*, by Peter Blatchford, Susan Hallam and Judith Ireson, University of London Institute of Education, and Peter Kutnick, Kings College, University of London, with Andrea Creech, University of London Institute of Education.

THEME 10: FUNDING AND GOVERNANCE

10/1 *The funding of English primary education*, by Philip Noden and Anne West, London School of Economics and Political Science.

10/2 *The governance and administration of English primary education*, by Maria Balarin and Hugh Lauder, University of Bath.



... children, their world, their education

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FURTHER INFORMATION

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