

# Perth & Kinross

## Local Agreements : Staff Review and Development

[Apr.1997]

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### **1 Introduction**

1.1 The Education Service Plan (Section 4.3) makes reference to the policy on staff development and review which was adopted from Tayside Regional Council and to the progress made by schools in relation to the implementation of this policy.

The plan highlights a number of targets in relation to staff development and review together with time scales by which the targets should be overtaken.

1.2 The purpose of this paper is to provide details of the revised arrangements for the process of review of staff within the Perth and Kinross education department which will enable the identified targets to be overtaken.

### **2 Background / Context**

2.1 Staff Development and Review was introduced to Tayside schools in 1992 and teaching staff were invited to participate in the process on a voluntary, planned basis. A policy statement and detailed guidelines for the administration of the scheme were drawn up. Support and training was made available to all members of staff who indicated an interest in participating in the review process.

By June 1996, 45% of teachers had been reviewed at least once and schools have become increasingly familiar with the management and administration of teacher review.

2.2 Since 1992 a number of adjustments were made to the procedures for conducting teacher reviews. This included extending the time scale of the review cycle from two to three years.

2.3 Despite the adjustments to the initial procedures it was clear that a number of problems were emerging which caused difficulty in sustaining the progress of staff development and review.

The main problems were:

- Training Arrangements: Regional policy required a minimum of one full day training for all participants and a further half day training for those who would be carrying out the role of reviewer. As staff joined the review process on a phased basis a significant amount of time would be directed each year to the training of new participants.

- Information Gathering: The staff development and review policy highlighted the importance of gathering a variety of evidence which could be used to assist the review process. Significant amounts of time could often be allocated to this process by both reviewer and reviewee.

- Managing the Three Year Cycle: Larger schools were required to develop sophisticated recording procedures to identify those members of staff who had participated in the review training process as well as those who had been reviewed. These recording procedures would be required to identify the appropriate timing of follow up or interim reviews and full reviews. ,

- Report Writing: The drawing up the written report of the review interview has also proved to be time consuming for reviewers as consideration was required to be given to the wording and construction of the written report.

2.4 The Staff Development and review process has been affected by other related developments. These have included:

- The introduction by Perth and Kinross Council of a staff review and development programme for APT and C staff.

- The government's intention to require education authorities to ensure that teacher appraisal should now be put on a statutory basis.

2.5 A working party comprising representatives from the Educational Development Service and primary and secondary schools was established in February 1997 with the task of revising the policy on staff development and review. In particular this would involve:

- changing the title of the process to staff review and development, in line with the council policy;

- making the process more manageable;

- making the process more action orientated.

The details of the group's recommendations are contained in the following sections of this paper.

### **3 Definition**

3.1 Staff Review and development is a continuous and systematic process intended to help and motivate individual teachers with their professional development and career planning and to ensure that staff development including in-service training, matches the complementary needs of individual teachers , department teams and schools.

3.2 Staff review and development is a positive process; intended to raise the quality of education by providing teachers with better job satisfaction, more appropriate staff development and better planned career development based upon more informed decisions.

#### **4 Rationale**

4.1 The process of staff review and development should be viewed as an integral part of the school development planning process. Staff review and development makes the most significant contribution to the identification of individual needs and to the professional development of staff in schools. Staff review and development has to be linked to individual and whole school development needs in such a way as to ensure that maximum professional development can take place while still ensuring that the aims and objectives of the school, as expressed in the school development plan, can be achieved.

4.2 A sense of ownership of the process of staff review and development should be encouraged amongst all staff involved. Good communication and a shared sense of purpose and direction are essential for effective staff review and development . The role of management at both school and education authority levels has to be facilitative and supportive at every stage of the process. There is a shared responsibility on individual teachers, departmental teams, schools and the education authority to ensure that needs are prioritised and met.

4.3 The creation of a positive climate in schools is an essential prerequisite to the success of the process of staff review and development.

4.4 The key part of the process of staff review and development is the engagement of individual teachers in self evaluation. Self evaluation is the foundation upon which developments, whether individual, departmental or whole school, are built.

In the staff review and development process individual teachers are encouraged to reflect upon their own performance, job description and career aspirations and to share the process and outcomes with their reviewer. Staff will be expected to have completed the self evaluation pro forma in advance of their review interview.

Similarly, the needs and priorities of the department and school should be balanced with the identified needs of the individual.

4.5 Staff review and development is intended to be an integral part of the wider arrangements for the development of staff. A crucial function of the review process will be to help individuals prioritise their needs . In so doing, it is important to ensure that these identified needs are achievable in terms of time and resources and are kept within manageable proportions for the teacher as well as the department, school and education authority.

#### **5 Management of staff review and development**

5.1 Head teachers will have the responsibility for ensuring that the staff review and development process is managed effectively and within the guidelines of the education authority. In larger schools this will normally be managed by the member of the senior management team with responsibility for staff development.

- Particular responsibilities in this area will include the following:
- Ensuring that an individual job description is maintained for every member of staff within the school;
- Co-ordinating arrangements for staff training and familiarisation with revised guidelines;
- Co-ordinating the programme of review interviews;
- Maintaining an up to date record of all members of staff involved in the process;
- Ensuring that a high priority is given to meeting the staff development needs of individual members of staff which have been highlighted during the staff review and development process;
- Ensuring that copies of review interview paperwork is kept centrally in a secure location;
- Ensuring that at least 50% of the school staff are involved in the staff review and development process on or before 1st September 1997 and that all members of staff are involved in the review cycle from September 1998.

Head Teachers will wish to ensure that arrangements for the management and administration of the review process are fully integrated within the school's policy on staff development.

It should be noted that schools which are currently participating in the staff development and review process will have already devised appropriate systems for monitoring and recording the review process. In such cases they should ensure that the revised arrangements to the process are integrated within existing structures.

5.2 Link Educational Development Officers will discuss proposed plans for the implementation of the staff review and development process within individual schools with Head Teachers. The link ED0s will also wish to discuss with Head Teachers ways in which the identified individual staff development needs can be taken forward within the school's Staff development programme.

5.3 Problems arising in the management or administration of the staff review and development process can be discussed with the link Educational Development Officer.

## **6 The Review Process.**

### **Identification of Reviewer**

6.1 Each person will have a designated reviewer from within her 1 his own school. Normally, this will be the person on the next level of the promoted structure.

6.2 For Head teachers the review procedure will be carried out by the appropriate Head of Service or her/his representative.

### **Preparation of Individual Job Descriptions**

6.3 The basis for any dialogue on a teacher's role within the school should be an agreed job description. All members of staff should have an individual job description which provides a focus for the staff review and development process.

The individual job description should be used to aid the process of personal and professional development by using it as a reference point for identifying areas of success and areas where further development may be focused.

6.4 The job description will state explicitly the job title and reporting relationships, the basic function of the post, the areas of responsibility, a description of the duties and key tasks. The job description should be reviewed periodically to establish priorities and areas for emphasis.

6.5 Education authority job remits and specifications plus nationally agreed lists of duties and conditions of service will provide the basis for individual job descriptions. In addition, it is important that the individual job descriptions take account of the wide range of professional contributions a teacher gives to the post and the school, and the current circumstances of the school.

### **The cycle of the staff review and development process**

6.6 . Review interviews must take place at least once every two years although Head teachers may choose to build in to the school development planning cycle, annual staff review interviews.

6.7 At least 50 per cent of all staff members should be participating in the review cycle by the commencement of session 1997/198 with provision being made by the school for every member of staff to participate in the review cycle during session 1998/199.

6.8 A key target in the revision of the guidelines for staff review and development has been to make the process more manageable and action orientated. In order to achieve this target the following guidance is provided for those conducting review interviews:

#### **Initial Meeting**

6.9 There is no formal requirement for an initial meeting to take place between the reviewer and the reviewee. Members of staff will become increasingly familiar with the arrangements for review interviews and the agenda which has been set for all interviews.

#### **Collection of Data**

6.10 Members of staff will, in most cases, be reviewed by a member of staff in the school who is familiar with their contribution to the work of the school. The requirement for reviewers and reviewees to spend large amounts of time on gathering and compiling data and information should be discouraged.

The reviewer should at all times aim to encourage the reviewee to engage in the process of self evaluation.

### **Agenda for Review Interviews.**

6.11 The agenda for all review interviews within Perth and Kinross schools will comprise the following:

(i) Welcome and introduction

(ii) Discussion of Reviewee's completed self evaluation

or

Discussion of progress in relation to reviewee's job description

(iii) Discussion of specific targets for further development by reviewee.

(iv) Discussion of staff development needs.

(v) Career review discussion (optional).

(vi) End of meeting

6.12 Interviews should be conducted within a positive framework and previous guidance in terms of ensuring that the time is protected from interruptions should be maintained.

6.13 in general terms review interviews will often be completed within one hour but must take no longer than two hours. Review interviews should only be continued or carried over to another date or time in exceptional circumstances.

6.14 Reviewees should be encouraged to reflect on aspects of their job description and to take forward a small number of targets for further development.

6.15 Consideration should also be given to the identification of staff development needs to assist in the development of the member of staff being reviewed.

6.16 If the reviewee wishes, the interview may spend some time discussing career pathways with indication being given by the reviewer on her/his views on the candidate's suitability for promoted posts, together with any general guidance to assist the candidate in this process.

6.17 At the end of each agenda item the reviewer should confirm with the reviewee the main points which have been discussed.

### **The Review Statement**

6.18 The reviewer will have the responsibility of drafting the written record of the review interview. This should be carried out by completing the relevant pro forma which requires the reviewer to summarise the main points as agreed during the review interview including the identification of agreed targets and staff development needs. There is no requirement for the reviewer to spend significant amounts of time on the construction of lengthy reports as part of this process.

6.19 The records of review interviews will be confidential to the reviewee and the reviewer but available to the Head Teacher and Director of Education.

6.20 The record of identified staff development needs will be passed to the school staff development co-ordinator and these records will be used by the co-ordinator to assess general school staff development needs.

### **Follow up meetings**

6.21 As the review process moves to a biannual or annual cycle, the need for follow up or interim reviews is diminished and there is no requirement for these to take place.

## **7 Appeals Procedure**

7.1 The right of appeal to the Director of Education or nominee will exist. In every case a named person will be indicated to whom an individual's appeal should be directed.

7.2 The appeal will normally be heard by the Head teacher or, in the case of Head Teachers, or where the Head teacher was a reviewer, by the Director of Education or his nominee.

7.3 Both reviewer and reviewee have the right to appeal.

7.4 If the appeal is upheld then a further review will be carried out with a different reviewer.

7.5 Nothing in the above precludes the teacher's right to institute formal grievance procedures in accordance with teachers' conditions of service.

## **8 Training of Reviewers and Reviewees**

8.1 Most schools will have already provided a significant amount of support for members of staff who have participated in the review process. This support will have included familiarisation with review procedures, and training for those conducting interviews. The focus for such schools will be providing members of staff with information relating to the revised arrangements for staff review and development.

A number of schools and members of staff will however have little background in the area of review training. In such circumstances Head teachers should seek to discuss arrangements for staff familiarisation with their link educational development officer.

In both cases, Head Teachers should ensure that some time is allocated for this purpose during an In service day or a planned activity time at the beginning of session 1997/98.

## **9 Monitoring and Evaluating staff review and-development processes and arrangements.**

9.1 The Educational Development Service will be closely involved in the support and monitoring of the staff review and development process.

9.2 At school level, it is the responsibility of the Head Teacher to monitor and evaluate the conduct of the school's staff review and development process.

9.3 An important aspect of monitoring and evaluating will be that of ensuring a degree of

consistency among and within schools. Evaluation will establish the extent to which the authority's policy is being followed, for example in respect of:

documentation

time allowed

identification of staff development needs

process by which these needs are met.