



# **Reducing teacher workload**

**Research report into shared planning**

**March 2018**

**Gareth Ellis, Phil Bell, Linda Buckle,  
Andy Sherlaw and Andrew K. Shenton  
Whitley Bay High School**

# Contents

Table of figures	4
1. Research Topic	5
1.1 The importance of shared planning	5
1.2 Principal fieldwork centre	6
1.3 Clarification of terms	6
1.4 Study aims	7
2. Approaches to Reducing Workload	8
2.1 Overall strategies	8
2.2 Investigative method employed	8
3. Research Projects	10
3.1 The individual shared planning projects	10
3.2 The research methodology and methods	10
3.3 The sample	11
3.4 Data analysis and findings	12
3.5 Limitations in the data and study	15
4. School Culture	16
4.1 Cultural barriers	16
4.2 Other adverse issues	16
5. Conclusion	18
5.1 The overall merits and effectiveness of shared planning	18
5.2 Costs and resources	18
5.3 Specific recommendations	19
References	20
Appendices	22
Appendix 1: Discussion of the need for a greater shared planning emphasis at Whitley Bay High School	22
Appendix 2: Lesson Planning Diary Proforma	23
Appendix 3: Detailed discussion of the research methods	26
Appendix 4: Participants	30
Appendix 5: Findings of the Baseline Survey	35
Appendix 6: Post-project Questionnaire	38

Appendix 7: Summary of responses to post-project questionnaire yes/no questions	42
Appendix 8: Key to Departmental Abbreviations Used in Identifiers	43
Appendix 9: Discussion of qualitative data from the post-project questionnaires and focus group meetings	44
Appendix 10: Limitations in the data and study	54
Appendix 11: Specific recommendations in detail	57

## Table of figures

Table 1: Characteristics of action research within the study	9
Table 2: Summary of responses to post-project questionnaire yes/no questions	13
Table 3: Breakdown of high school diary contributors according to teaching experience	30
Table 4: Breakdown of high school diary contributors according to their time at the organisation	30
Table 5: Subjects taught by high school diary contributors	32
Table 6: Breakdown of high school post-project questionnaire respondents according to teaching experience	32
Table 7: Subject specialisms of the high school post-project questionnaire respondents	33
Table 8: Breakdown of high school focus group participants	33
Table 9: Breakdown of middle school diary contributors according to teaching experience	34
Table 10: Breakdown of middle school diary contributors according to their time at the organisation	34
Table 11: Breakdown of primary school diary contributors according to teaching experience	34
Table 12: Breakdown of primary school diary contributors according to their time at the organisation	34
Table 13: Time spent on planning overall	35
Table 14: Time spent on planning in relation to teaching experience	35
Table 15: Total time spent on planning in relation to Key Stage	36
Table 16: Time spent on different forms of planning	36
Table 17: Time spent on planning during different days of the week	37

# 1. Research Topic

## 1.1 The importance of shared planning

In March last year, a report prepared by the Independent Teacher Workload Review Group (2016) proposed a series of principles aimed at eliminating unnecessary workload associated with planning and the preparation of resources. The document attracted much publicity and the issues raised have recently been discussed in articles appearing in such magazines as the NAHT's *Leadership Focus* (Bowen, 2017) and *SecEd* (O'Connell, 2017). Collaborative planning features prominently in the Review Group's report, and O'Connell recognises that the provision of opportunities for work of this kind forms one of the key means of addressing the workload challenge.

After a successful application for funding had been made to the National College for Teaching and Leadership (NCTL), Whitley Bay High School and its collaborating schools and academic partners (i.e. Professor Christine Merrell, of Durham University's Centre for Evaluation and Monitoring, and independent research consultant Dr. Andrew K. Shenton) investigated the area of shared planning, with specific reference to the capacity of the practice to reduce the time teachers spend on planning whilst maintaining high standards of student attainment and engagement.

Shared planning was chosen as a focus for Whitley Bay High's Workload Challenge Study for two main reasons. Firstly, the report of the Teacher Workload Review Group (2016) specifically recommended that "teachers should engage in collaborative planning" (p. 12). Secondly, a degree of shared planning had already taken place at Whitley Bay High and the school's senior leaders had prior, anecdotal knowledge of its potential to lessen workload and raise the standard of teaching and learning. The practice was not, however, school policy and had not hitherto been applied consistently throughout the organisation. The study presented an opportunity to embed shared planning and apply it across the school in order to raise standards of teaching and learning in all curriculum areas.

The Workload Challenge Study that is reported here addressed two research questions. The primary research question was: "To what extent and in what ways do shared planning practices reduce teacher workloads?" The secondary research question was: "What advantages and disadvantages emerge with the use of the method?"

## 1.2 Principal fieldwork centre

Situated in a small coastal town in north-east England, Whitley Bay High School is a large, Local Authority Maintained Foundation School with a Trust in North Tyneside. The majority of the school's students come from four local feeder middle schools. With 1619 students at the time of writing, Whitley Bay High caters for learners between the ages of thirteen and eighteen. The school has demonstrated a longstanding support for CPD and research: for fourteen years one timetabled hour per week has been allocated for whole staff training. This has been fundamental to the creation of the school's ethos - a highly motivated, expertly trained teaching staff provide stimulating, challenging and exciting learning opportunities for the students. It was one of the first 100 schools nationally to be designated a Teaching School in July 2011 and is the lead school in the Whitley Bay Teaching Schools Alliance. In 2015, it was recognised by the Government as one of the 100 highest performing secondary schools in the country. The most recent inspection report (Ofsted, 2013) saw the school graded Outstanding in every area. Whitley Bay High School regularly deploys its twenty-one designated Specialist Leaders in Education (SLE) to a variety of school support programmes locally.

With around 550 students currently enrolled, Whitley Bay High's Sixth Form is larger than average. In 2016, approximately 99% of Year Thirteen students went on to Further Education, Higher Education, training or employment.

In 2017, 80% of all grades across all subjects were A\* - C or the equivalent new 9 – 4 grading in English and Maths. The validated Progress 8 score for 2016 and the unvalidated score for 2017 are significantly positive.

## 1.3 Clarification of terms

It is important from the outset to explain the distinction between “joint planning” and “shared planning”. From our previous experience, we believe the latter to be of greater benefit with respect to planning, reducing workload and maintaining high academic standards. Shared planning differs from joint planning in that

- joint planning usually involves only a small number of people planning on a short term basis, together simultaneously – it does not save time;
- shared planning involves a middle leader strategically facilitating a team of teachers in the planning of a module of lessons; the process involves the delegation of planning and is overseen and accountable;
- shared planning enables the consistent delivery of high calibre lessons across a department or school and distributes the workload.

We believe the joint planning/shared planning distinction to be of considerable importance in ensuring that time spent planning is reduced without existing standards deteriorating.

## **1.4 Study aims**

Our aims, as outlined in our initial research bid, were

- to investigate the time teachers spend planning;
- to facilitate, in project teams, the development of initiatives intended to reduce workload whilst ensuring high standards are maintained, in accordance with the recommendations of the Teacher Workload Review Group (2016);
- to be able to provide consultation on a good practice framework which can assist other schools.

## 2. Approaches to Reducing Workload

### 2.1 Overall strategies

Broadly, Whitley Bay High has pioneered the following practical approaches to the reduction of workload in planning and developing resources:

- Designated departmental time has been made available for shared planning, with subject-specific foci. Work might include, for example, planning a new scheme of work or a department-wide approach to revision.
- Cross-curricular “experts” have been given opportunities to prepare content within their own areas of planning expertise, train others and share planning. Expertise areas are those of “starters”, “questioning”, “developing thinking”, and “creative resources”.
- Time has been allocated for staff to develop effective systems for sharing and storing the results of shared planning, such as via a VLE or another online platform.
- Shared planning interventions and initiatives have been introduced alongside CPD, with regular opportunities for teachers to plan together.

For a discussion of the need for a greater shared planning emphasis in Whitley Bay High School, see Appendix 1.

### 2.2 Investigative method employed

The overall framework that underpins the study is best understood in terms of the **action research model**. The table below enumerates the features of action research that emerge from the definitions of this form of inquiry offered by the *International Dictionary of Management* (Johannsen and Page, 1975) and the *International Dictionary of Education* (Page, Thomas and Marshall, 1977). These characteristics are noted in the left-hand column. The right-hand column indicates how they are evident in the Workload Challenge Study.



Element of action research	Evidence of element within study
Work is commissioned	School secured funding from the NCTL to conduct research after a successful bid
Recruited external researchers are associated with academic institutions	Externals have strong links with universities of Durham and Northumbria*
Study examines a specific problem within the organisation	Problem was that of teacher workload, especially in relation to planning and the preparation of resources
A solution is formulated and implemented	Overall solution was shared planning; subject teams developed and put into practice their own forms
The strategy adopted is evaluated for effectiveness	Analysis was conducted by one of the external specialists and formed the subject of an initial 8,000-word report for the Senior Leadership Team
New organisational policies are put into effect on the basis of what has been learnt	New practice becomes departmental policy and is shared in training with the whole staff within school and across the North East at a variety of conferences

**Table 1: Characteristics of action research within the study**

\* *Erlanson et al (1993) point out that the findings of a study must not emerge from the biases of the investigator. This is a particular danger in practitioner research, in which the familiarity with the organisation that the inquirer enjoys may well inhibit their ability to view the situation with real detachment. In contrast, a measure of neutrality was ensured in the Workload Challenge Study through the use of a director of research at Durham University and an external consultant with strong connections to Northumbria University. The latter's published research output has been recognised through the award of a Higher Doctorate from the institution and his paper on trustworthiness in qualitative inquiry has been cited on more than 4,000 occasions. Both externals played key roles in the study.*

## **3. Research Projects**

### **3.1 The individual shared planning projects**

With the overall strategies outlined in Section 2.1 in place at Whitley Bay High School, teachers within the school were invited to work in their subject departments in order to develop initiatives that would reduce staff workload whilst maintaining the organisation's existing high standards.

Many of the shared planning projects were very specific, relating to a certain area, topic or unit, and were intended to cater for a particular year group. Some reflected the stage of the school year when the project was carried out. In several initiatives, there was an emphasis on revision, for example. Overall, foci included the creation of a scheme of work, the preparation of individual lessons and the construction of new resources, such as *PowerPoint* slides, homework booklets, worksheets or other assessment materials.

Typically, the projects began with the content in question broken down into some form of manageable chunks, each of which could be tackled by a separate member of staff who specialised in that area. Rules or principles were then frequently agreed in order to establish a set format or template so as to ensure a degree of consistency of practice within the department. Nevertheless, not every project involved shared planning with a view to creating the materials outlined above. There were also cases where teachers concentrated on building up their own knowledge in preparation for the introduction of new courses, on the re-use of existing resources or on joining virtual groups/forums. Other staff worked on instituting a central repository (via *Padlet*) for storing resources and lesson plans, and promoted it as a reference area for student revision.

### **3.2 The research methodology and methods**

A hybrid research design, involving the use of both qualitative and quantitative data collection and analysis methods, was employed after a "situational" stance had been adopted. As Rossman and Wilson (1985) explain, this perspective recognises the value of approaches associated with either of the two research paradigms and allows for their use in different situations within the same inquiry. In the Workload Challenge Study, so as to satisfy separate research aims, quantitative methods were employed to facilitate measurement, whilst qualitative methods allowed open-ended exploration of the particular circumstances of individual teachers. In terms of data collection tools, the study incorporated the use of such well-established methods as participant diaries, questionnaires and focus groups (examples and discussion of these can be found in the Appendices 2, 7 and 9 respectively).

Three schools within the same Local Authority were involved in the study. The principal fieldwork centre was Whitley Bay High School – the organisation that was responsible for the inquiry overall – whilst the additional centres were a middle school located in the same town and a primary school situated only a few miles away.

For a more thorough discussion of the research methods employed, please see Appendix 3.

## **3.3 The sample**

### **3.3.1 The participants, data collection phase one**

The first stage of data collection involved staff making diary entries to record their planning during the week beginning Monday, 16th January 2017. A breakdown of those who submitted these data is given in Appendix 4. Appendices 4(a) and 4(b) show the composition of this sample according to the degree of teaching experience and the number of years staff have spent at the school respectively, whilst Appendix 4(c) indicates the subjects that were taught by the contributors during the week in question.

### **3.3.2 The participants, data collection phase two**

The second stage of data collection involved staff completing post-project questionnaires. A breakdown of those who returned these documents is given in Appendix 4. Appendix 4(d) shows the composition of this sample according to the degree of teaching experience, whilst Appendix 4(e) indicates the particular subject specialisms of the staff involved.

### **3.3.3 The participants, data collection phase three**

The third and final stage of data collection involved fourteen staff attending focus group meetings. A breakdown of those who participated is given in Appendix 4(f).

### **3.3.4 Contributors of the diaries**

A breakdown of the diary contributors in the middle school is shown in Appendix 4. Appendices 4(g) and 4(h) show, respectively, the composition of this sample according to the degree of teaching experience and the number of years staff have spent at the school. Appendices 4(i) and 4(j) provide similar information in relation to the participants in the primary school.

## **3.4 Data analysis and findings**

### **3.4.1 The baseline survey**

During the week in question, the time spent by teachers on planning was seen to vary depending on experience and stage in career, but when all the time taken in relation to all the different elements of planning is totaled for all the three schools, planning time outweighs the time spent on marking. Other key discoveries may be summarised thus:

- In the principal fieldwork centre, teachers with four to six years of experience spent most time on planning, whilst their counterparts in the UPS 3 category spent least.
- On average, a teacher spent nearly thirty-eight minutes planning each lesson.
- Teachers did the majority of their planning on a Sunday, with day-to-day planning declining in allocated time as the week progressed from this point onwards.
- For a teacher in the first three years of their career, 602 minutes per week were spent on planning. This equated to a daily average of eighty-six minutes.
- The difference between time spent planning and time spent marking increased as the Key Stage progressed, with planning time at Key Stage Five almost twice as high as marking time.

Overall, what was learnt from the baseline data reinforced the research team's belief that a more rigorous and systematic approach to shared planning was required.

The tables that present the findings of the baseline survey in detail can be found in Appendix 5.

### **3.4.2 Quantitative data from the post-project questionnaires**

The following table (Figure 2) summarises the quantitative data from the post-project questionnaires:

Has the project (or do you expect the project to)...	No data	Yes	No
Improved the quality of planning?	0	69	4
	0%	95%	5%
Saved you planning time?	2	60*	11
	3%	82%	15%
Improved confidence with the VLE?	2	22	49
	3%	30%	67%
Encouraged departmental teamwork?	0	70	3
	0%	96%	4%

**Table 2: Summary of responses to post-project questionnaire yes/no questions**

\* Five (i.e. 8%) of those in the "Yes" category indicated that either their project would save them time next year/eventually or it had the potential to do so.

In 2017 the school improved its Progress 8 score to what it expects to be significantly above national average. There is an acceptance from the senior leadership that the departments that were most successful in shared planning contributed most significantly to the school's results.

See Appendix 7 for a discussion of the data presented in this table.

### **3.4.3 Qualitative data from the post-project questionnaires and focus group meetings**

#### **3.4.3.1 Positive aspects of shared planning**

In relation to the study, the intended benefit as a whole, namely that staff workload should be reduced without negatively impacting on quality, was often evident in the data pertaining to individual projects characterised by shared planning. Staff evaluated positive benefits in the following areas:

- Shared planning was seen to benefit various dimensions of teaching life beyond reducing the time taken planning, including its potential for training staff and developing the skills of others.
- Some teachers relished the opportunity to apply their specialisms for the benefit of their professional colleagues.

- There was seen to be greater consistency in the appearance of the materials produced.
- There were improvements in levels of communication, collaboration, discussion or teamwork within a department.
- The projects have opened up a non-threatening professional dialogue where staff critique plans and offer each other suggestions for improvement.
- In many departments, the project was noticed to have increased the impetus for colleagues to share ideas for other year groups.
- Greater levels of enjoyment, enthusiasm or motivation was noticed in students and some fed back to staff on improved enjoyment of lessons and greater understanding of the topics covered.
- Shared planning projects encouraged various forms of reflection in the planning process.
- A more “joined up” approach developed across many departments. Examples included a more uniform approach to differentiation and range of activities.
- Departments had a more honest appraisal of the effectiveness of existing practices.
- Teachers embraced the concept of shared planning as they enjoyed contributing to the greater good, but also had allocated time within CPD to plan the best lessons they could. The importance of even such fundamentals as the time and opportunity that the projects offered to tackle work which departmental teams already knew had to be undertaken should not be underestimated.
- Given the nature of the departments in which some of the respondents worked, shared planning was impossible. Still, these “soloists” were at least able to take action that resulted – or could result – in a significant benefit.
- Some in small departments viewed their workload projects as opportunities to cushion the effects on others of forthcoming changes to GCSE or A Level specification.
- Even one-person departments were open to the possibility of shared planning with the possibility of working with other local schools being suggested as a possible strategy moving forward.

#### **3.4.3.2 Negative aspects of shared planning**

- The overall conclusion for the majority of staff was that the project and shared planning had reduced workload without impacting on quality. Some feedback did, however, highlight problems within shared planning. In the context of transparency, the main negative comments are included below, yet are limited to a very small number of teachers:

- Some staff were of the opinion that the project allowed shared planning only in some of their classes and not all, meaning it could have no more than minor beneficial effects.
- Many staff talked of their expectation that the planning burden may be eased next year or in 2018/19 as their project was based on lessons during this academic period.
- Some staff mentioned difficulties in almost over-planning to ensure staff had all potential levels covered within their lesson, as “every class is different so you have to differentiate massively”.
- A few members of staff appreciated that shared planning had indeed saved them time in planning, but this had been offset by the amount of time they now spent marking.
- Occasional comments highlighted the difficulty in following the original planner’s thinking and lesson transitional processes. This reduced confidence in delivery.
- A small minority were concerned about the time that was taken up by “tweaking”.
- Shared or joint planning was found to be difficult, or even impossible, in small departments or situations where a certain area is taught by only one member of staff.
- The practicalities of dividing up areas fairly when they differ in the degree of content and number of units was also discovered to be problematic on a few occasions.
- Caution was expressed in one department who suggested any arrangement under which teachers prepared individual lessons singly was unwise, insisting, “it should be a sequence”.
- All teachers of the same subject must be equally highly committed to the initiative.

A more detailed and comprehensive analysis of the post-project questionnaire and focus group data is available in Appendix 9.

### **3.5 Limitations in the data and study**

The research team were aware of a number of limitations in the data for this study, many identified in conjunction with participants.

For a discussion of these limitations, please see Appendix 10.

## **4. School Culture**

### **4.1 Cultural barriers**

It is important from the outset to appreciate that in the school which served as the principal fieldwork centre, different “sub-cultures” exist in the various departments. In some, an atmosphere of sharing and collaboration was already well established, whilst in others there was much greater evidence of “solo” work.

In terms of cross-school barriers, however, perhaps the most obvious danger is that the kinds of shared planning that have been put into practice in the principal fieldwork centre may be impractical in especially small organisations, such as, for example, first schools where there may be only one class in each year group. In theory, it could be possible to counter some of the challenges associated with size by creating teams based on Key Stages rather than subjects, although greater investigation would be needed to assess the viability of this option.

Even in high schools, there may be particular “local” circumstances that are difficult to overcome. In particular, school leaders should be aware of the difficulties that may exist in applying a whole school approach to shared planning if the staff body includes a high proportion of newly-qualified teachers or many experienced staff who have spent much of their working lives doing their own planning.

Certainly if shared planning is to be effective long term in reducing teacher workload, it is essential that the school’s Senior Leadership Team provides designated planning time within a wider context of continuing professional development, offers opportunities to share good practice, develops effective systems for storing and sharing lesson plans and other associated documentation, and models what high quality planning might look like. SLTs must, therefore, appreciate the initial time investment at the onset of the intervention in order to see benefits in the future. Furthermore, schools where shared planning already exists to a degree should not discount revisiting the process from a more strategic and systematic perspective, offering definitions of what shared planning is (within their own context) to avoid confusion amongst staff, especially with regard to the differences between “shared planning” and “joint planning”. The aim must be to maximise the potential of the concept and maintain a school-wide standard.

### **4.2 Other adverse issues**

- Based on the findings reported in Section 3.4.3.2, it may be summarised that shared planning was weakened, less effective or even impossible in the circumstances when
- one person departments were involved;



- individual members of staff taught their own modules, units or lessons and no-one else in the department had the expertise necessary to prepare content on the areas involved;
- recipients of shared planning considered it unnatural to work from materials that had been prepared by someone else;
- certain processes proved especially time consuming in terms of
  - the departmental staff involved reaching a preliminary consensus with regard to the work to follow;
  - what needed to be done in order to prepare lessons that had to incorporate sufficient differentiation to cater for students of every level of ability;
  - the adjustments that had to be made by a teacher to customise a planned lesson in order to serve their purposes;
- ICT systems that were to play a crucial role in making available the outcomes of shared planning failed to meet teachers' expectations;
- interpersonal differences arose between individual members of staff, sometimes as a result of certain teachers failing to fulfill what others regarded as their duties to the team.

## **5. Conclusion**

### **5.1 The overall merits and effectiveness of shared planning**

The most significant pluses may be listed as follows:

- In many instances, workload was seen to be reduced as staff did not have to plan lessons from scratch.
- Shared planning enabled teachers to exploit their skills in particular areas.
- Teachers who were not experts in the subject of the planned lesson benefited from the specialist knowledge of the colleague who had prepared it.
- The quality of planning frequently increased as teachers within a department endeavoured to prepare materials that were of a similar standard to that of their colleagues.
- More uniformity was evident in the materials that were produced.
- Dialogue and teamwork within many departments improved.
- The lessons that had resulted from shared planning were well received by students.
- Teachers reported how the projects in which they had been involved led them to reflect more actively on their own skills, practice and previous work, and gave them a greater awareness of strategies employed by their colleagues. On many occasions this led individual teachers to offer students a greater diversity of activities.

### **5.2 Costs and resources**

Much of the ability to establish a whole school commitment to shared planning is dependent on senior leaders being willing to assign time within the working week to allow shared planning to take place. Of course, this time could be used for other purposes so opportunity loss needs to be considered.

If shared planning is going to involve staff elsewhere (as could happen with a one-person department, for example), teachers in other schools need to be similarly committed and prepared to give up their time. Shared planning also creates demands in terms of the time required for liaison between staff and meetings, which can be problematic if the teachers involved are separated geographically or are part-time and work on different days.

The school responsible for the study that has formed the subject of this report recruited, and paid accordingly, two external experts in order to strengthen the research team. Data from staff elicited via the post-project questionnaires indicated that several teachers considered the work to be still ongoing and, if a formal

evaluation of the study is to take part in the future, it may well be the case that either same or comparable specialists will need to be engaged again, thereby incurring further expenses.

### **5.3 Specific recommendations**

The following ten points are a summary of our recommendations based on the research outlined within this study. For a more detailed discussion of them, see Appendix 11.

1. Set time aside for shared planning.
2. Divide the work in such a way as to exploit teachers' specialisms.
3. Agree from the outset on the fundamentals, whilst remaining flexible to individual predispositions.
4. Encourage continuity and progression in the students' experiences.
5. Be prepared to make significant investment of time in the early stages.
6. Build on the existing team spirit within subject departments.
7. Make sure that everyone is on board and understands the aims.
8. Accept that shared planned is no panacea.
9. Ensure that the ICT infrastructure can support the demands that will be made of it.
10. Make provision for staff in one-person departments to plan with colleagues elsewhere.

## References

Bowen, J. (2017) Taking on the workload challenge. *Leadership Focus*, February, pp. 21-24.

Dervin, B. (1983) *An overview of sense-making research: concepts, methods, and results to date*. Paper presented at the annual meeting of the International Communication Association, Dallas, Texas, May. URL: <http://faculty.washington.edu/wpratt/MEBI598/Methods/An%20Overview%20of%20Sense-Making%20Research%201983a.htm> (accessed: 7/8/2017)

Erlandson, D.A., Harris, E.L., Skipper, B.L. and Allen, S.D. (1993) *Doing naturalistic inquiry: a guide to methods*. Thousand Oaks: Sage.

Firestone, W.A. (1993) Alternative arguments for generalizing from data as applied to qualitative research. *Educational Researcher*, 22 (4), pp. 16-23.

Glaser, B.G. and Strauss, A.L. (1967) *The discovery of grounded theory: strategies for qualitative research*. Chicago: Aldine de Gruyter.

Guba, E.G. and Lincoln, Y.S. (1989) *Fourth generation evaluation*. Newbury Park: Sage.

Independent Teacher Workload Review Group (2016) *Eliminating unnecessary workload around planning and teaching resources*. URL: [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/511257/Eliminating-unnecessary-workload-around-planning-and-teaching-resources.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/511257/Eliminating-unnecessary-workload-around-planning-and-teaching-resources.pdf) (accessed: 8/8/2017).

Johannsen, H. and Page, G.T. (1975) *International dictionary of management*. London: Kogan Page.

Krueger, R.A. (1994) *Focus groups: a practical guide for applied research*, 2nd ed. Thousand Oaks: Sage.

Lincoln, Y.S. and Guba, E.G. (1985) *Naturalistic inquiry*. Newbury Park: Sage.

Maykut, P. and Morehouse R. (1994) *Beginning qualitative research: a philosophic and practical guide*. London: Falmer Press.

O'Connell, S. (2017) A workload audit: thirty key questions for your school. *SecEd*, 25th May, 480, p. 6.

Ofsted (2013) *School report: Whitley Bay High School*. URL: <https://reports.ofsted.gov.uk/inspection-reports/find-inspection-report/provider/ELS/108638> (accessed: 10/8/2017).

Page, G.T., Thomas, J.B. and Marshall, A.R. (1977) *International dictionary of education*. London: Kogan Page.

Patton, M.Q. (1990) *Qualitative evaluation and research methods*, 2nd ed. Newbury Park: Sage.

Pickard, A.J. (2013) *Research methods in information*, 2nd ed. London: Facet.

Rossman, G.B. and Wilson, B.L. (1985) Numbers and words: combining quantitative and qualitative methods in a single large-scale evaluation study. *Evaluation Review*, 9 (5), pp. 627-43.

Shenton, A.K. (2004) Strategies for ensuring trustworthiness in qualitative research projects. *Education for Information*, 22 (2), pp. 63-75.

Shenton, A.K. and Dixon, P. (2004) Debates and paradoxes surrounding the use of qualitative methods. *Education for Information*, 22 (1), pp. 1-12.

# Appendices

## Appendix 1: Discussion of the need for greater shared planning at Whitley Bay High School

As stated, a degree of shared planning had already taken place at Whitley Bay High in advance of the Workload Challenge Study. Where shared planning existed, however, it had not been formalised and the extent varied according to the subject, Key Stage and year group. At the outset of the study, key Raising Achievement Leaders were asked to audit their shared planning activity in the areas for which they were responsible. Some recorded significant levels of shared planning:

- “In terms of Key Stage Four, [we’re] working together [and] very structured due to the nature of the exam. Everyone [is] doing the same thing.” (Head of Art)
- “GCSE schemes are good quality and shared. Everyone [is] tweaking their own and storing locally. All on VLE.” (Head of Chemistry)
- “Key Stage Three scheme of work is contributed by a member of staff for whole department use. Co-ordinated centrally and well communicated. Homeworks planned, calendared and common assessments.” (Head of Year Thirteen)

Other departments, though, reported less engagement with shared planning:

- “VLE is now in use, but in its infancy. Difficult to get together: two part-time [teachers in department]. Not everybody likes it.” (Head of Modern Foreign Languages)
- “Everyone plans their own lesson at A Level, therefore different classes will be delivered differently.” (Head of Physical Education)
- “No shared planning as only one member of department so no-one to share planning with.” (Head of Music)

It is clear from the above data that there are key departments and subjects in which good practice already exists with regard to shared planning, and other areas and departments where shared planning could be further developed to reduce teacher workload. The study provided an ideal opportunity, then, for all staff in Whitley Bay High to develop a more systematic approach to the practice.

## Appendix 2: Lesson Planning Diary Proforma

Teaching experience (circle one):

1-3 years

4-6 years

UPS 1-2

UPS 3

How many years have you taught at Whitley Bay High School (including this year)?

\_\_\_\_\_

What is your subject/s? \_\_\_\_\_

How many Key Stage 3 lessons do you teach each week? \_\_\_\_\_

How many Key Stage 4 lessons do you teach each week? \_\_\_\_\_

How many Key Stage 5 lessons do you teach each week? \_\_\_\_\_

Monday 16th January

Key Stage	Monday total lessons	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3								
4								
5								

Tuesday 17th January

Key Stage	Tuesday total lessons	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3								
4								
5								

Wednesday 18th January

Key Stage	Wednesday total lessons	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3								
4								
5								

Thursday 19th January

Key Stage	Thursday total lessons	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3								
4								
5								

Friday 20th January

Key Stage	Friday total lessons	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3								
4								
5								



Saturday 21st January

Key Stage	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3							
4							
5							

Sunday 22nd January

Key Stage	Time spent planning	Original planning time	Adapting own existing lesson	Adapting lesson from elsewhere	Using dept planned lesson	Reviewing knowledge	Time spent Marking
3							
4							
5							

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Time spent lesson planning							

## **Appendix 3: Detailed discussion of the research methods**

In accordance with the advice of Pickard (2013), the research instrument employed to gather the diary data was pilot tested at the principal fieldwork centre in advance of its use with the main body of teachers.

In order to elicit baseline data with regard to the time spent on planning and the preparation of resources by teachers in each of the schools, all staff were asked to maintain a diary over a period of a week (see Appendix 2 for a clean copy). All diary entries were made during a week in January 2017 that was not abnormal in any of the schools. Thanks to high levels of commitment from staff and reminders from senior leadership, ninety-nine diaries were submitted in the principal fieldwork centre, thereby providing a return rate of 90%. In the primary school, the response was also excellent, with all fifteen of the teachers issued with diary proformas returning them completed, although in the middle school only fourteen of the twenty-four teachers did so. In sum, 128 diaries were received, with a return rate of 86%. The data collected were analysed via *SPSS* by the Durham University-based research consultant. The statistics that she provided included totals, frequencies, percentages, means and standard deviations. These covered such areas as the overall amount of time spent planning in each school, how much time was spent planning according to the teaching experience of the teachers, the time spent planning in relation to each Key Stage, the time spent on different forms of planning and the time spent planning on the individual days of the week in question.

Teachers at the principal fieldwork centre were then asked to work in subject-based teams on their particular initiatives to reduce planning time whilst still maintaining existing standards associated with teaching and learning. These projects took place between January and June 2017.

When the deadline for the completion of the departmental initiatives was reached, all available teachers at the principal fieldwork centre were invited to complete post-project questionnaires. These were distributed during a whole school training event on 20th June. The questionnaires encouraged the teachers to reflect on the effectiveness of their projects and elicited data that were then subjected to qualitative and quantitative analyses. A copy of the questionnaire is provided in Appendix 6. All the qualitative material submitted via the seventy-three completed questionnaires was analysed by the consultant associated with Northumbria University, who advised the school throughout the study on good research practice. When examining the questionnaire data, he employed the classic constant comparative method pioneered by Glaser and Strauss (1967), which has now been in use for fifty years. This process began with the examination of the first words used by the first questionnaire respondent in the first large answer space. Once a concept had been identified within this material, a category was defined to summarise the concept and a term created to

“name” it. When the next concept was encountered, either later in the same teacher’s words or in the response of a different individual, this was compared with previous concept so that it could be categorised and coded in the same way as the like concept that had already been noted. If there was no such similar concept, a new category, represented by a new term, was formed. This procedure continued until all the text offered by the last respondent in the last large answer space of their questionnaire had been scrutinised. Ultimately, all data sharing the same term were united and understanding of each concept addressed by the data was developed from the totality. The yes/no responses given by the participants to the final four questions were examined separately, through the use of frequency counts and percentages generated via *Microsoft Excel*.

On 11th July 2017, four focus groups met. Broadly, the purpose of the focus group interviews lay in gathering qualitative data in order to identify, via exploration of the participants’ personal situations, the reasons for the quantitative findings that had already emerged. This is a well-accepted strategy in hybrid research (Shenton and Dixon, 2004). When determining the composition of the groups, the research team ensured that all the participants in each would share a high degree of commonality (Krueger, 1994). To this end, a rigorous form of “criterion sampling” as outlined by Patton (1990, p. 176) was applied, with “information-rich cases” selected. Patton explains how these are “cases from which one can learn a great deal about matters of importance. They are cases worthy of in-depth study.” (p. 181) The make-up of the first two focus groups was informed by what had been learnt from the data submitted in the diaries. One group consisted of staff who had been spent more time planning during the week in question than their colleagues, whilst the second sampled those who had spent least. These focus group meetings were largely devoted to ascertaining the reasons why. Two teachers took part in these focus group meetings without having completed post-project questionnaires. Two more focus groups were based on the data collected via the post-project questionnaires. One consisted solely of teachers who had indicated that their initiative had not achieved the intended aim of reducing time spent planning. The other focus group concentrated on members of one particular subject department, i.e. Maths, and whose experiences in the Workload Challenge Study had, in contrast, been overwhelmingly positive. Again, the focus groups explored the possible causes. In total, fourteen staff took part in the focus group meetings, each of which lasted around half an hour. A semi-structured approach was taken, with the moderator working from a schedule but diverging from it when the contributions of the participants were deemed worthy of follow-up prompts to elicit more detail or clarification.

The focus group moderator applied a form of iterative questioning that he had developed himself (Shenton, 2004). Essentially, he tested the post-project questionnaire data for integrity by returning, in the focus groups, to issues previously raised by the same staff in the questionnaires. Member checking is considered by

Guba and Lincoln (1989) to be the single most important strategy for bolstering the credibility of qualitative research. Within the Workload Challenge Study, member checking involved issuing, after the event, each focus group participant with a copy of the record of the conversation to which they had contributed and requesting that they highlight any situations in which they felt that the document presented in some way an inaccurate picture of what they had said. Several staff suggested alterations and the appropriate amendments were then made to the records. All focus group data were analysed by the research consultant associated with Northumbria University, who again applied the constant comparative technique.

In September 2017, once the research team had formed their recommendations and constructed the good practice framework, the Deputy Head of Whitley Bay High returned to the middle and first schools in order to ask staff in these organisations to validate the creations and outline their utility in their own situation.

Maykut and Morehouse (1994) refer to the importance of using “debriefers” during the course of a study. Debriefing sessions took place on several occasions. For example, after writing a draft version of his report on findings that had emerged from the post-project questionnaire data, the research consultant from Northumbria University discussed the results with the school’s Deputy Head. Later, immediately after moderating the last focus group meeting, the research consultant compared his ideas on the sessions with those of the school’s Research Development Officer, who, through extensive note-making, had compiled a record of the conversations as they took place. The research consultant and the Research Development Officer then reported to the Deputy Head and tested their ideas against his experiences. The fact that two researchers were involved in running the focus group meetings helped to reduce the problem of investigator bias, which often emerges when only one person is responsible for an inquiry (Maykut and Morehouse, 1994).

Overall, the study incorporated both forms of triangulation identified by Pickard (2013). Triangulation via data source was ensured by approaching a wide range of staff for participation. All teachers in each of the schools were invited to complete a structured diary in the early stages; some five months afterwards, all available teachers in the principal fieldwork centre completed post-project questionnaires. Then, again in the high school, the focus groups drew on staff of different ages, levels of seniority, degrees of teaching experience and subject specialisms. Triangulation by technique was thus ensured by utilising three different means of data gathering: structured participant diaries, post-project questionnaires and focus group meetings, before draft outcomes were tested with the Senior Leadership Teams of the middle and primary schools.

Lincoln and Guba (1985) refer to the importance of an “audit trail”, which Pickard (2013) explains is a “road map” that enables the reader to follow the researcher’s

thinking and see how the conclusions they have been drawn arise from the data (p. 319). With regard to the latter, the conventions applied when reporting the study findings are crucial. Where reference is made to the ideas or specific words of a particular teacher, a three-part alpha-numeric identifier is cited. The individual elements indicate the person's subject department, the extent of their teaching experience and details that direct the reader to one of the documents in which the appropriate data can be found, thereby enabling interested scrutineers to see the actual material for themselves and learn more about the context in which the individual made their observation. If the data came from a questionnaire, the number of this questionnaire is cited as part of the final element of the identifier and, if the same individual also took part in a focus group, the number of their group is shown at the end, in square brackets. If, however, the data were contributed in a focus group meeting, information about the person's subject department and the degree of their teaching experience is followed by the number of the focus group in which they offered their data, and the questionnaire reference is given last, again in square brackets. Thus, the overall code not only serves to "name" the respondent; it also gives the reader brief background information about the nature of the contributor and provides a scrutineer with the insight they need in order to trace the data involved and make a proper assessment of the study's evidential base. A key to the abbreviations used to represent the subject departments is provided in Appendix 8.

## Appendix 4: Participants

The following tables give an overview of the participants in the project.

Experience	No data	1-3 years	4-6 years	UPS 1-2	UPS 3
No. of respondents	2	12	19	17	50
%age proportion of responses	2%	12%	19%	17%	50%

Table 3: Breakdown of high school diary contributors according to teaching experience

WBHS experience	No data	1-3 years	4-6 years	7-9 years	10-12 years	13-15 years	16+ years
No. of respondents	1	21	14	16	15	15	17
%age proportion	1%	22%	14%	16%	15%	15%	17%

Table 4: Breakdown of high school diary contributors according to their time at the organisation

Subject	No. of teachers
Applied Studies	3
Art and Design	4
Business Studies	6
Certificate of Personal Effectiveness	1
Child Development	1
Design Technology	3
Drama	1

Economics	3
English	11
Enrichment	1
Extended Project Qualification	3
Financial Planning	1
Food Technology	5
General Studies	4
Geography	6
Health and Social Care	3
History	8
Information and Communication Technology / Computer Science	4
Mathematics	12
Media / Film Studies	4
Modern Foreign Languages	5
Music	1
Personal, Social and Health Education	4
Philosophy and Ethics	2
Photography	2
Physical Education / Sport	11

Psychology	4
Religious Education	2
Science	20
Sixth Form	1
Special Needs / Intervention / Learning Support	3
Textiles	3

**Table 5: Subjects taught by high school diary contributors**

<b>Experience</b>	<b>1-3 years</b>	<b>4-6 years</b>	<b>UPS 1-2</b>	<b>UPS 3</b>
No. of respondents	7	12	18	36
%age proportion of responses	10%	16%	25%	49%

**Table 6: Breakdown of high school post-project questionnaire respondents according to teaching experience**

<b>Subject</b>	<b>No. of teachers</b>
Art and Design	4
Business Studies	3
Drama	1
English	11
Geography	5
History	5



Mathematics	9
Modern Foreign Languages	3
Music	1
Physical Education / Sport	4
Psychology	2
Religious Education	2
Science	11
Technology	9

**Table 7: Subject specialisms of the high school post-project questionnaire respondents**

Three teachers did not indicate their subject.

<b>Focus group</b>	<b>Participants</b>
One	Four UPS 3 staff: one Geography teacher, one Science teacher and two Technology teachers
Two	Three staff with three to five years of teaching experience: specialisms in History, Mathematics and Psychology respectively
Three	Three staff: one UPS 1-2 Drama teacher, one UPS 3 Music teacher and one UPS 3 Religious Education teacher
Four	Four Mathematics staff: one with one to three years of teaching experience, another with four to six and two within the UPS 3 category

**Table 8: Breakdown of high school focus group participants**

<b>Experience</b>	<b>No data</b>	<b>1-3 years</b>	<b>UPS 1-2</b>	<b>UPS 3</b>
No. of respondents	3	1	5	5
%age proportion	21%	7%	36%	36%

**Table 9: Breakdown of middle school diary contributors according to teaching experience**

<b>Middle school experience</b>	<b>No data</b>	<b>1-3 years</b>	<b>4-6 years</b>	<b>7-9 years</b>	<b>10-12 years</b>	<b>13-15 years</b>	<b>16+ years</b>
No. of respondents	1	4	2	1	1	4	1
%age proportion	7%	29%	14%	7%	7%	29%	7%

**Table 10: Breakdown of middle school diary contributors according to their time at the organisation**

<b>Experience</b>	<b>No data</b>	<b>1-3 years</b>	<b>4-6 years</b>	<b>UPS 1-2</b>	<b>UPS 3</b>
No. of respondents	2	1	6	3	3
%age proportion	13%	7%	40%	20%	20%

**Table 11: Breakdown of primary school diary contributors according to teaching experience**

<b>Primary school experience</b>	<b>No data</b>	<b>1-3 years</b>	<b>4-6 years</b>	<b>7-9 years</b>	<b>10-12 years</b>	<b>13-15 years</b>	<b>16+ years</b>
No. of respondents	1	3	3	2	0	1	5
%age proportion	7%	20%	20%	13%	0%	7%	33%

**Table 121: Breakdown of primary school diary contributors according to their time at the organisation**

## Appendix 5: Findings of the Baseline Survey

School	No. of teachers	Mean time (mins)	Standard deviation (mins)
The high school	99	641	277
The middle school	14	720	501
The primary school	15	756	334

**Table 13: Time spent on planning overall**

Teaching experience	The high school			The middle school			The primary school		
	N	Mean (mins)	SD (mins)	N	Mean (mins)	SD (mins)	N	Mean (mins)	SD (mins)
No data	2	590	163	3	495	630	2	377	195
1-3 years	12	643	249	1	570		1	590	
4-6 years	18	789	314	0			6	967	386
UPS 1-2	17	606	192	5	1027	638	3	830	87
UPS 3	50	600	287	5	580	149	3	567	171

**Table 14: Time spent on planning in relation to teaching experience**

N = number of teachers

SD = standard deviation

<b>Educational stage</b>	<b>Mean (mins)</b>	<b>Standard deviation (mins)</b>
Foundation Stage	798	187
Key Stage One	579	176
Key Stage Two	798	450
Key Stage Three	672	318
Key Stage Four	642	274
Key Stage Five	650	278

**Table 15: Total time spent on planning in relation to Key Stage**

	<b>Original Planning Time</b>		<b>Adapting own existing lesson</b>		<b>Adapting lesson from elsewhere (e.g. TES)</b>		<b>Using department planned lesson</b>		<b>Reviewing knowledge</b>		<b>Time spent marking</b>	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Overall	226	229	135	118	24	46	66	77	65	75	278	200

**Table 16: Time spent on different forms of planning**

All figures are given in minutes.

<b>Day</b>	<b>Number of teachers</b>	<b>Mean time (mins)</b>	<b>Standard deviation (mins)</b>
Monday	128	114	75
Tuesday	128	112	69
Wednesday	128	111	84
Thursday	128	97	82
Friday	128	72	64
Saturday	126	30	67
Sunday	128	127	97

**Table 17: Time spent on planning during different days of the week**

## Appendix 6: Post-project Questionnaire

*Department:*

*Teaching experience (circle one):*

*1-3 years*

*4-6 years*

*UPS 1-2*

*UPS 3*

*We would greatly appreciate your feedback on the following:*

- An overview of your project and a summary of the work you did.*

- What strategies for reducing workload have you developed or considered?*

*Has this, or do you expect this to:*

*a. improve your own practice?*

*b. improve your work life balance?*

*Any particular successes you'd like to report on?*

- Anything you felt **didn't** work well, or that teachers should avoid?*

- Anything else you would like to inform us about which could be useful for our report?*



YES

NO

*Has the project, or do you expect the project to:*

*Improve the quality of planning?*

*Saved you planning time?*

*Improved confidence with using the VLE ?*

*Encouraged departmental teamwork?*

## **Appendix 7: Summary of responses to post-project questionnaire yes/no questions**

Given that the statistics presented in Figure 2 are so positive with regard to the projects improving the quality of teachers' planning, saving staff planning time and encouraging teamwork within departments, the low percentage of respondents who said that their confidence in using the VLE had not increased may seem disappointing. Two significant explanations may be offered for this result. In particular, many of the most ICT-literate staff may have felt entirely comfortable because they were already using it regularly. Indeed, TEC/UPS3/Q12, ENG/UPS1-2/Q47 and HIS/UPS3/Q71 commented to this effect. For others, such as TEC/UPS3/Q35, BUS/UPS1-2/Q38, ENG/4-6/Q48, SCI/UPS3/Q63 and SCI/UPS1-2/Q67, the question was irrelevant as their project did not involve use of the VLE. TEC/UPS3/Q35 reported that their team had instead uploaded material to *Google Docs*. In answering the VLE question, two respondents drew attention to the system's inadequacies. Some teachers were deterred from using it after initial adverse experiences. ENG/UPS1-2/Q42 highlighted the fact they regarded it as "unreliable" and pointed to the time wasted by the user whilst waiting for it to load up and GEO/UPS3/Q29 argued that, in terms of demonstrating the potential of the VLE, their workload project had done no more than reveal its limitations.

## **Appendix 8: Key to Departmental Abbreviations Used in Identifiers**

NODEPT	No department indicated by respondent
BUS	Business Studies
DRA	Drama
ENG	English
GEO	Geography
HIS	History
MAT	Mathematics
MFL	Modern Foreign Languages
MUS	Music
PE	Physical Education
PSY	Psychology
RE	Religious Education
SCI	Science
TEC	Technology

## **Appendix 9: Discussion of post-project qualitative data**

### **Teacher workloads before the shared planning projects**

One of the major discoveries emerging from the data collected in the “diary” phase of the study was that, during the week when the record was maintained, staff in the UPS 3 teaching experience category spent less time planning on average than their colleagues in other groups. When this issue was explored with UPS 3 teachers in the first focus group, various reasons emerged. SCI/UPS3/FG1[Q61] felt they now had a sound knowledge of the curriculum and what it required of students. The same teacher was also well aware of areas where students typically struggle, and TEC/UPS3/FG1[Q13] found their experience of how students generally respond to be an aid to their planning. TEC/UPS3/FG1[Q13] and SCI/UPS3/FG1[Q61] noted that over time they had assembled a considerable collection of resources. The former pointed out that they had developed a familiarity with a range of “interactive activities and strategies” from years of attending Tuesday afternoon training sessions, and TEC/UPS3/FG1 added that they had benefited from the long term sharing of resources. UPS 3 teachers also exploited the experience they had gained of drawing on resources created in other departments over a prolonged period.

TEC/UPS3/FG1[Q13] accessed these via a “shared area”, whilst TEC/UPS3/FG1, who supported students with special needs as well as working in Food Technology and Textiles, found it useful from a planning perspective to “dip into departments across the school”. Experience led to psychological advantages, too. TEC/UPS3/FG1 referred to their ability to go into a classroom feeling confident and without having to “plan it all out on paper in advance”, and SCI/UPS3/FG1[Q61] had come to appreciate that “planning and writing to the nth degree doesn’t always translate to the classroom”. Teachers reduced their planning time as a result of necessity, as well; GEO/UPS3/FG1[Q30] and TEC/UPS3/FG1[Q13] commented that experienced staff take on extra responsibilities and there is a consequent reduction in the time available for existing tasks, such as planning.

Data submitted as part of the study’s “diary” phase revealed that, during the week in which staff logged their planning workload, individuals with four to six years’ experience of teaching spent more time planning on average than their colleagues. When this discovery was investigated in a focus group made up of teachers in this category, again, several factors emerged. HIS/4-6/FG2[Q68] knew that, unlike their more senior fellow professionals, they had not yet compiled a substantial bank of lessons and resources. HIS/4-6/FG2[Q68] admitted, too, that their mind was frequently occupied trying to “plan lessons ‘the Whitley Bay way’”, so as to ensure that their lessons were consistent with the school’s ethos. PSY/4-6/FG2 contrasted their current situation with that in their first few years in teaching. At the very beginning of their career, PSY/4-6/FG2 was happy to adopt any worthwhile lessons

and ideas “but at the level we are [now] you want to make it all your own and do things your own way”. PSY/4-6/FG2 felt a certain pressure to ensure that their lessons were enjoyable to students but recognised that this desire came from within themselves, rather than from the expectations of senior leaders. HIS/4-6/FG2[Q68] knew that whilst they had benefited from some practices within the school, they had suffered in other respects. They believed, for example, that they saved time from not having to formulate lesson objectives; yet the saved time was spent elsewhere.

HIS/4-6/FG2[Q68] found the task of creating resources especially time consuming. In a previous focus group, the experienced TEC/UPS3/FG1 had made a similar admission, saying, “getting the resources done is a big task”. Nevertheless, it would be unwise to assume that this was a huge challenge across every subject. Commenting in response to HIS/4-6/FG2[Q68]’s situation, MAT/4-6/FG2[Q52] explained, “in Maths, it’s not the resources [that are time consuming]”. For HIS/4-6/FG2[Q68], the problems were especially marked where new specifications were involved in text book purchases. The same teacher pointed to the costs that arise when using *TES* materials, and highlighted the expenses that they would incur if they wanted to include them in their planning. In their subject, PSY/4-6/FG2 had been impressed by a Web site that offered high quality resources free of charge but these had to be modified to meet their needs. PSY/4-6/FG2 and HIS/4-6/FG2[Q68] agreed that background reading on areas to be taught demanded much time. Whilst the former found that a useful strategy to guide their own reading around a topic lay in devising “a list of questions that I think students will ask me”, HIS/4-6/FG2[Q68] had explored “a suggested reading group from AQA” but there was “nothing that’s completely relevant”. They recalled, “I’ve spent nights trying to find information”.

## **Positive aspects of shared planning**

The intended benefit of the study as a whole, namely that staff workload should be reduced, was often evident in the data pertaining to individual projects characterised by shared planning. As SCI/UPS3/Q5 explained succinctly, you “give one, get six!” MAT/4-6/Q10 spoke for a lot of staff when commenting that workload had been lessened because many lessons did not have to be planned from scratch. ENG/UPS3/Q46 summarised the situation neatly: “Original lesson planning is very time consuming but adapting planned lessons is quick and efficient.” SCI/UPS3/FG1[Q61] was one of only a handful of staff who put time values on the work involved without any prompting. For them, tweaking “means instead of spending two hours planning from scratch, you can get a good lesson in twenty minutes”. Other teachers were reluctant to suggest even tentative figures for savings in time when asked. MAT/4-6/FG4[Q6] declared unequivocally, “you can’t get a full picture of how much it’s reduced workload in the short time of the project”. Meanwhile, MAT/UPS3/FG4[Q56] pondered, “it’s difficult. Because we had planning time together to do that there was a period there that we could put a figure on... The

saving was considerable day to day, but this doesn't include time spent together." Departmental colleague MAT/1-3/FG4[Q55] offered their perspective in the same focus group: "It felt like I was planning one lesson a week, rather than three a week, so for me it was initially cut by a third, but you still had to spend time looking at others' work and tweaking, so therefore I'd say maybe it cut [planning time] by about a half."

Shared planning was seen to benefit various dimensions of teaching life beyond reducing the time taken planning. SCI/UPS3/Q58 noted its potential for training staff and developing the skills of others, for example. More frequently, however, the advantages of allowing staff with certain specialisms to design lessons that were closely aligned to their strengths were highlighted. Not only did this exploit the expertise of individual teachers; it also often led their colleagues to acquire a fresh personal perspective. MFL/UPS3/Q40 wrote, "it's good to get ideas about how you can teach things differently". In particular, the eyes of TEC/UPS3/Q15 were opened to the different teaching styles and the experiences of fellow staff. For GEO/UPS3/Q29, shared planning ensured that there was now a greater range in their teaching and learning ideas. MAT/UPS3/FG4[Q56] explained that, in their situation, variety had resulted from becoming "aware others might do things differently". MAT/UPS3/Q56[FG4] reported how insights from colleagues led to what were, for them, innovations in the classroom itself: "Using ideas and expertise of others has meant I've tried new approaches." A greater repertoire of tasks or activities that would readily be available for use with students was commonly cited as another plus. SCI/UPS1-2/Q66, who was involved in a project to create a central store of materials, felt reassured "knowing that whatever topic is going to be taught, there will be lessons and resources ready".

Some teachers relished the opportunity to apply their specialisms for the benefit of their professional colleagues. TEC/UPS3/FG1 enjoyed how "what I'd done got people thinking", and SCI/UPS3/FG1[Q61] appreciated the novelty of the situation, reflecting, "you demonstrate to students a lot but rarely to staff and peers so it was really good to be able to do this". It would seem, however, that some subjects are better suited to exploiting teachers' specialisms than others. MAT/UPS3/FG4[Q57] reported that, in Maths, the division of work to be planned was not at all influenced by this consideration. A much more important factor for staff in this department was planning the material on the basis their students' weaknesses.

There was seen to be greater consistency in the appearance of the materials produced. Several teachers, such as RE/UPS3/Q18, GEO/UPS3/Q31 and GEO/UPS3/Q73, commented on the "corporate" style had been forged, although SCI/UPS1-2/Q64 felt that, if resources had an identical look, they might be "boring for students". Uniformity was deemed to extend beyond the look of materials; there was greater standardisation of planning and/or lessons, too (GEO/1-3/Q28,

BUS/UPS3/Q36, GEO/UPS3/FG1[Q30]). For RE/UPS3/Q18, the corporate approach “helps me stick to the point and not wander off on tangents” and even made them “more organised”. The quality of the resources produced as a result of the projects, and indeed the calibre of lessons themselves, were widely praised as well.

There were improvements in levels of communication, collaboration, discussion or teamwork within a department (SCI/UPS3/Q5, TEC/UPS3/Q35, BUS/UPS3/Q37, ENG/UPS3/Q45, MAT/UPS1-2/Q54, MAT/1-3/Q55[FG4], MAT/UPS3/Q57[FG4], TEC/UPS3/FG1[Q13]). For MAT/UPS3/FG4[Q57], the collaborative process started at the outset of the project with the talks that led to achieving a consensus with regard to a planning format “that was right for everyone”. In the words of MAT/4-6/FG4[Q6], “it was important for us all to agree on what we wanted at the end”. The same teacher recounted how the process took place: “We had an open discussion about what we all needed. We went with the popular opinion and went with structure of what everyone needed at that early stage.” Undoubtedly the Maths workload project exploited the existing team spirit within the department. MAT/UPS3/FG4[Q57] summed it up this way: “Our ethos is very ‘showy offy’ – we want to share what we’ve done and encourage others to use it. We don’t just care about the kids in our classroom, we care about the team. If we have something we think others would like we share it with them.”

Later in the projects, SCI/UPS3/FG1[Q61] had found that “people are more willing to discuss where their planning has gone wrong or where it needs clarification, so people are less offended with suggestions. This project has opened avenues.” For GEO/1-3/Q28, the enhanced communication helped to ensure that all members of the department “are on track”. GEO/UPS3/Q29, a colleague teaching the same subject, said shared planning encouraged individual teachers to raise their game, commenting that they felt required to prepare work “to the same (high) standard as everyone else”. A similar view was expressed by HIS/UPS3/Q71. MAT/1-3/Q55[FG4] acknowledged that “planning for more than you made me put more thought into what I was creating”. MAT/1-3/FG4[Q55] felt it encouraged people “to show off your best”, when if they were planning only for themselves it was easy to think, “I’m happy with that”. For TEC/UPS3/FG1[Q13], the project led to “quality assurance”. MAT/UPS3/FG4[Q56] believed that the workload project encouraged individuals to be more adventurous, too, acknowledging that they looked to ensure “plenty of variety and include things you may not put in automatically”.

Still in the Maths Department, the project was noticed to have increased the impetus for colleagues to share ideas for other year groups (MAT/UPS3/Q56[FG4]). SCI/UPS3/Q65 sounded a note of caution, however, feeling that the communication required for successful outcomes would have to extend to the need for feedback to the originator on the lesson involved, and members of the department had “to be

open to others' views". ENG/UPS3/Q45 admitted that they felt "awkward when criticising the success of other teachers' lessons".

Analysis of the qualitative data led the research team to identify numerous benefits already felt by the learners. These included greater levels of enjoyment, enthusiasm or motivation (ART/UPS3/Q8, ART/UPS3/Q25, ART/UPS1-2/Q26, ART/UPS3/Q27, SCI/UPS3/Q65). More specifically, MAT/4-6/Q7 and RE/UPS3/Q18 reported receiving positive student feedback on the style of recently introduced worksheets and the structure of the new format for *PowerPoint* slides respectively. RE/UPS3/Q17[FG3], meanwhile, reported that their Year Ten class "seem to like the more uniform feel" apparent in the resources. Some staff had detected improved student outcomes, such as greater understanding of the topics covered (SCI/UPS3/Q58, SCI/1-3/Q60). Another teacher commented broadly that "all the students benefited from doing 'the same'" (ART/UPS3/Q27). This can be equated with the "equality of provision" that SCI/UPS3/Q5 and SCI/UPS3/Q59 felt were significant advantages of shared planning. PE/UPS1-2/Q20 believed that if "all students receive the same or similar lessons, they usually have similar strengths and weaknesses [in relation] to content and this can identify areas for improvement the next time round".

Shared planning projects definitely encouraged various forms of reflection. For GEO/UPS3/Q29, it "makes you consider all attributes of a lesson and make sure that they are in". Another member of staff in the same department referred to how they reassessed their own practice which led them to "keep the good information and remove the less good" (GEO/UPS3/Q30[FG1]). The streamlining of the planning process prompted a few teachers to concentrate on what they recognised to be the essentials. As lesson plans were being prepared as much for colleagues as for the creator personally, there was also, though, the challenge of ensuring that the tacit knowledge that the individual brought to bear was rendered explicit for the wider readership involved. This will be considered in greater detail subsequently.

A more "joined up" approach developed in places, with RE/UPS3/Q18 recounting how they had linked lessons to textbook chapters, thereby making it easier for students to access additional information. This also helped learners who had fallen behind to catch up (RE/UPS3/Q17[FG3]). Some projects alerted staff to thinking about how differentiation may be achieved (PE/1-3/Q21). SCI/4-6/Q62 saw distinct advantages of shared planning in this area, saying that the practice was "brilliant for differentiation". MAT/UPS3/FG4[Q56] explained how differentiation became embedded in what was planned by the Maths Department: "We established and included what was the most basic and most difficult for this topic. Resources were built up from bottom to top, and midway, with considerable flexibility. We included vast differentiation – a good range of activities for people to pick and choose." For PE/1-3/Q21, the time savings that resulted from shared planning meant that greater



effort could be invested in differentiation “so each student got a high quality of support”. MAT/4-6/Q6[FG4] cited another area where the time saved in planning could be used – the provision of improved feedback to students.

An English project led to an honest appraisal of the effectiveness of existing practices (ENG/UPS3/Q44), as well as a reduction in duplicated effort (ENG/UPS1-2/Q42). One teacher in this department believed that the project had “encouraged me to reflect on my skills and has driven me/allowed me to aspire. Everyone has unique strengths and it is fantastic to see them in action” (ENG/UPS3/Q51). Several staff commented that their project had reminded them of activities they had almost forgotten but which they could use more frequently (e.g. SC/UPS3/Q65, HIS/4-6/Q68[FG2], HIS/UPS1-2/Q70, TEC/UPS3/FG1, TEC/UPS3/FG1[Q13]). The way in which the study provided a means of learning about the work of other departments could also reveal to a teacher limitations in their own knowledge. SCI/UPS1-2/Q67 indicated that, as a result of what they now knew, “I’ll be taking a look at *Padlet*”. The mere process of explaining their teaching and learning ideas to other staff made MFL/UPS3/Q39 “more aware of where the pitfalls may occur”.

The importance of even such fundamentals as the time and opportunity that the projects offered to tackle work which departmental teams already knew had to be undertaken should not be underestimated. SCI/UPS1-2/Q67 welcomed the way the project afforded the chance to plan a module that the department had previously identified needed designing. In the words of MUS/UPS3/FG3[Q9], “it gave me time to actually do some planning”. MAT/UPS3/FG4[Q56] explained, “designated time really, really helped: *this is planning time and this is when you do your planning*”. For MAT/UPS3/FG4[Q57], the fact that the planning sessions took place during the school day, rather than after it, meant “everyone was on board. Now’s the time to do it.” SCI/UPS3/FG1[Q61], meanwhile, noted how their department’s initiative had given people “the focus in the training time to do something practical”. Some teachers anticipated that the way in which their department’s work had changed as a consequence of the projects would have long term beneficial effects. SCI/UPS3/FG1[Q61] recalled, “in the past, the teacher in charge [of the subject] produced booklets which others used in different ways but now this will alter. It’ll be more suited to the curriculum”.

Given the nature of the departments in which some of the respondents worked, shared planning was impossible. Still, these “soloists” were at least able to take action that resulted – or could result – in a significant benefit. For example, DRA/UPS1-2/Q19[FG3], who joined an Edexcel forum in order to share ideas, commented that it was “good to see what others are doing”, and said that their project had “highlighted the need to work smarter” (DRA/UPS1-2/FG3[Q19]). MUS/UPS3/Q9[FG3], who joined an Edexcel group for their own subject, felt that this “will hopefully increase” the variety of the resources and lessons available to them. It

certainly opened their eyes to the work done by one-person departments in other schools (MUS/UPS3/FG3[Q9]), and, because of what they had learnt from the workload project, “I now spend time in the evenings reading the online posts and set aside time to do this and make use of them”. For this teacher, the rapid rate of curriculum change had impressed on them the need to be less introspective. They reflected that, in 2016/17, “every Year Ten and Year Twelve lesson has been new and then next year every Year Eleven and Year Thirteen lesson will be new. This has highlighted the idea of shared planning and talking to people on *Facebook* has shown to me that if we could have further time to spend seeing what other people do, then that would help. Discussing ideas from others in training and other Heads of Music could be great, but the whole thing needs tweaking, and more time.” (MUS/UPS3/FG3[Q9])

Some in small departments viewed their workload projects as opportunities to cushion the effects on others of forthcoming changes. DRA/UPS1-2/FG3[Q19] was being joined next year by three English specialists who would be teaching elements of the Drama curriculum and was keen to plan for them. RE/UPS3/FG3[Q17] was concerned with a similar situation in their own department. They were soon to be supported by two History specialists and wanted “to make sure these teachers have everything they need”. Although these changes in circumstances would obviously result in greater sharing of the teaching load, DRA/UPS1-2/FG3[Q19] pointed out that more meetings and greater liaison with other staff would be required. These tasks were likely to prove time consuming, especially when the teachers involved were physically separated from DRA/UPS1-2/FG3[Q19] in different parts of the school.

Even though they worked in a one-person department, the possibility of shared planning was not dismissed out of hand by MUS/UPS3/FG3[Q9]. Beginning from the standpoint, “I don’t have anyone to share that planning with [at Whitley Bay High]”, MUS/UPS3/FG3[Q9] reflected, “if I want to do shared planning with another person I’d have to meet with someone from another school”. They admitted that they were deterred by the implications of travelling elsewhere at the end of the working day – a time when they were normally needed for music practices and rehearsals. On balance, MUS/UPS3/FG3[Q9] concluded, “it’s something that would be nice but it presents difficulties in terms of time”.

### **Negative aspects of shared planning**

Many staff were of the opinion that time spent planning had been much reduced. Still, this was by no means a universal view. PSY/4-6/FG2 drew attention to how the limited nature of the project in which they had participated meant it could have no more than minor beneficial effects. PSY/4-6/FG2 highlighted that only one topic had been involved so even though the materials created had been shared among the

relevant staff, “you still had to plan lots of lessons”. For SCI/UPS3/Q63, whose department had already carried out much shared planning in the recent past, “the benefits were not as large as for those who current do not”. Lots of teachers felt that the initial burst of activity required had been considerable. Many talked of their expectation that the planning burden may be eased the next year or in 2018/19. MAT/4-6/FG2[Q52], for example, was delighted that their project team had now assembled a bank of resources to cover the new syllabus “so it’s certainly there for later”. HIS/4-6/FG2[Q68] sounded a note of caution, though, adding that when specifications change “everyone’s back to square one”. MAT/1-3/FG4[Q55] felt that the results of future research into effective teaching and learning would eventually need to be accommodated into their own practice, “so I wouldn’t envisage doing these same lessons in three years’ time”. MAT/4-6/FG4[Q6] was of the opinion that teachers would introduce insights from research naturally over time, suggesting that since the material that had been created in the workload projects was of high quality, people would obviously want to use it and consideration of the implications of the latest research would be part of the teacher’s annual revisiting of the work.

MAT/4-6/Q6[FG4] felt that the time required to prepare a lesson which covered all grades was especially time consuming. One possible solution, identified by MAT/UPS1-2/Q54, meant working with and for a departmental colleague teaching a comparable set of students. MAT/4-6/FG2[Q52] knew that the foci of their team’s Maths project, i.e. revision and work for exams, had been well chosen, pointing to the problems caused by setting when attempts were made to share planning routinely – “every class is different so you have to differentiate massively”. Whilst HIS/4-6/FG2[Q68] appreciated that shared planning had indeed saved them time in planning, this had been offset by the amount of time they now spent marking.

It is striking how often respondents noted the need to “tweak” or, in the words of TEC/4-6/Q32, “personalise” material that had been shared or which had originated further afield. Typically tweaks were made to suit either the teaching style of the recipient of the lesson or the nature of the class. Most staff had no real objection to teaching lessons that had been prepared by another party but DRA/UPS1-2/FG3[Q19] felt uncomfortable when asked to do so, admitting that when they did this in a learning support context, “I find it very hard because I’m not following their train of thought”.

For ENG/UPS3/Q46, exposure to different ideas “makes you quick to adapt” and most teachers were happy to make the necessary adjustments to lessons prepared by others. PSY/UPS1-2/Q24 generalised, “staff typically feel more confident delivering a lesson they have some ownership of”. SCI/UPS3/Q63 saw the lesson materials provided as a basis from which they could begin, opining that shared planning was “great for planning ‘out of specialism’ – having a starting point for you to

develop further". TEC/UPS3/FG1[Q13] referred to the value of this material in providing "a framework" and "foundation stuff".

Others were concerned about the time that was taken up by "tweaking" (PSY/1-3/Q16, PSY/UPS1-2/QA24, GEO/USP3/Q30[FG1], TEC/4-6/Q32). Fears surrounding the time such amending would consume led to the reorientation of a Maths project. MAT/UPS3/Q56[FG4] recalled, "initially we tried making full revision lessons but moved away from that as we felt that different classes/teachers would mean that we would each spend too long tweaking". Still, ENG/UPS3/Q44 forecast that the time required for tweaking would lessen over time, writing that, in the years ahead, tweaking might be done for the benefit of "specific learning needs, rather than a more fundamental tweak on the content of the learning".

For RE/UPS3/FG3[Q17], the real challenges lay with preparing a lesson for others, rather than delivering one produced for them. RE/UPS3/FG3[Q17] mused on how it was difficult to build into the lesson plan the necessary level of explanation: MAT/UPS3/FG4[Q57], however, took a contrasting approach, believing there was a need for "not making it too complicated so that others could pick it up easily".

When each project is examined individually, there were occasions when one of the products was more effective than another. MAT/UPS1-2/Q54, who had been involved in an initiative aimed at creating Year Eleven revision lessons and worksheets in Maths, found that the latter "worked amazingly well", whereas the planned lessons "weren't as useful".

Shared or joint planning was found to be difficult, or even impossible, in small departments or situations where a certain area is taught by only one member of staff (TEC/UPS3/Q13[FG1], TEC/1-3/Q14, TEC/UPS3/Q15, RE/UPS3/Q18, DRA/UPS1-2/Q19[FG3]). Particular issues emerged in TEC/UPS3/FG1[Q13]'s department, with the teacher observing, "there are lots of different subjects in our department and many Key Stages covered with crossovers of teaching so it's sometimes been difficult to dish out shared planning". Some teachers who had grown accustomed to working on their own relished the fact that responsibility for their subject fell exclusively on their shoulders. DRA/UPS1-2/FG3[Q19] admitted, "I like that level of autonomy and responsibility, that level of control".

The practicalities of dividing up areas fairly when they differ in the degree of content and number of units was also discovered to be problematic on occasion (TEC/UPS3/Q15). Whilst some, such as GEO/UPS3/FG1[Q30], had no complaints in this regard, with the teacher commenting, "new topics [in the new curriculum] *have* meant lots of extra work, but it's been shared out,"

Technical matters also caused concern. HIS/4-6/Q68[FG2] noted that if access to the VLE failed, no lessons would be available, and PSY/1-3/Q16 highlighted that time

was needed for the appropriate materials to be uploaded. Other time pressures occupied the mind of RE/UPS3/Q17[FG3], who felt it was often difficult to find sufficient opportunity to converse with colleagues and articulate thought processes.

Many respondents commented on the improved teamwork that had been evident but ENG/UPS1-2/Q42 thought too much time was spent on discussion. A departmental colleague, ENG/UPS1-2/Q47, concurred, commenting that this was due to “too many cooks, so to speak”. These words perhaps imply that this particular team was too big and another member of the same department, ENG/UPS3/Q45, recommended that large groups should be avoided, citing the problem that they made it difficult for everyone to have a voice.

In terms of how shared planning is organised, PE/UPS1-2/Q20 thought any arrangement under which teachers prepared individual lessons singly was unwise, insisting, “it should be a sequence”. There are obvious benefits with regard to continuity and progression in such a situation. For MAT/UPS3/Q57[FG4], more peer support within their department should have been provided when the project was taking place. They recounted that each member of staff had worked in isolation, whereas “pairs would be better to bounce ideas off”. SCI/UPS1-2/Q66 felt that in their project there could have been greater effort made in the early stages, when the details of the work were being agreed, to achieve a more prescriptive approach, saying that excessive latitude had been allowed in recording the lesson details. They suggested that in the future it might be preferable to insist on a standard format as “individual styles can often stop lessons showing continuity”. The comments of ENG/UPS1-2/Q42 and ENG/1-3/Q43 emphasise that the degree of detail expected in a lesson plan needs to be determined at the outset. For ENG/UPS3/Q44, the initial concern had to be more fundamental – shared planning should not begin “without having a clear vision of where the unit ‘fits’ in the greater scheme of things”. As a general rule, SCI/UPS3/Q65 asserted, “Clarity at the start saves time as the end!”

Many of the above issues clearly imply that project teams are best constructed when their members are restricted to one department, although here, too, of course, all teachers of the same subject must be equally highly committed to the initiative. GEO/1-3/Q28 commented, “all need to buy into it for it to work”. A colleague in the same department expressed a similar sentiment (GEO/UPS3/Q29). For HIS/UPS1-2/Q72, a significant challenge was “ensuring everyone meets agreed deadlines”. Although HIS/4-6/FG2[Q68] welcomed the safety net that the project had brought about, commenting, “it’s nice to know if anything goes wrong there’s a lesson there”, they appreciated that some teachers “weren’t comfortable using other people’s work... Some staff in History don’t like teaching shared lessons as they haven’t been planned in their teaching style.”

## Appendix 10: Limitations in the data and study

Ideally, several rounds of diary entries should have taken place at the principal fieldwork centre at different points in the year before the workload projects commenced. In explaining the concept of “circling reality”, Dervin (1983) refers to “the necessity of obtaining a variety of perspectives in order to get a better, more stable view of ‘reality’ based on a wide spectrum of observations from a wide base of points in time-space” (p. 7). Several factors militated against any attempt to acquire a longitudinal perspective, however:

- Since the Workload Challenge study ran for only the last two terms of the 2016/17 academic year, no data could be collected in the September to Christmas period.
- Once the inquiry started in January 2017, a central priority lay in making time available for the individual department-based projects to be carried out. Obviously these could not take place until the baseline data devoted to the time spent planning by each member of staff before the initiatives had been contributed.
- What was considered desirable from a research perspective in terms of gaining an accurate picture of the time teachers spend planning had to be weighed against what could reasonably be expected of teachers. It certainly seemed ironic that a study aimed at reducing teacher workload could, in the immediate term, lead to more demands being made of them, in terms increasing the degree of paperwork required.
- The task of asking staff to make diary entries during several “typical” weeks would have been hugely challenging. Ideally, it may be said that each set of diary entries should be planned on the basis of two consecutive “normal” weeks – the first would be the week that the planning was taking place and the second would be the week to which some of the planning (especially that recorded for Friday, Saturday and Sunday) would pertain. The difficulties of choosing two appropriate weeks for each round of diary entries are, of course, magnified when three different schools are involved.
- Concern arose among the research team that return rates would diminish with each round of diary entries, especially as only 58% of teachers in the middle school submitted diaries when only one batch was required. It is not unusual for return rates to deteriorate significantly in studies that incorporate a longitudinal element, as commitment to the work wanes over time, particularly if no immediate benefits accrue, and the cumulative effect of several bursts of efforts are felt. Given the fact that quantitative research relies for its credibility on the sheer weight of numbers that results from a large sample size, the likely fall-off was identified as a significant issue.

For some high school teachers, the task of quantifying time spent planning for recording in their diaries was in itself far from straightforward. TEC/UPS3/FG1 explained that planning was not just a formal process undertaken when sitting at their desk, and indicated that they were doing “constant planning in my head throughout the [school] day”.

Although diary data were collected from all three participating schools, workload projects were not undertaken in either the primary school or the middle school. Consequently, no post-project questionnaires were administered. Nevertheless, draft versions of the recommendations and good practice framework were submitted to the Senior Leadership Teams in these organisations for validation in their particular context.

One research strategy that was considered but rejected lay in asking staff at the principal fieldwork centre to make a second set of diary entries on completion of the workload projects, near the end of the summer term, again during a “typical” week. This option was attractive in that it would mirror the kind of pre-test/post-test approach that has won widespread acceptance in fields of research that favour an experimental design. If this model had been applied here, baseline data would have been collected initially via the diaries, the project would have taken place and then copies of the same diary instrument would have been used to gather data immediately afterwards to allow a comparison to be made. It was realised, however, that this strategy would be unwise in view of the fact that the effects of the workload projects would be felt long term, rather than immediately, and after the deadline for the submission of the report.

Even when the post-project questionnaires were being completed in the principal fieldwork centre in June 2017, many of the workload initiatives were still ongoing. Moreover, a large proportion of the lessons that had been prepared were yet to be delivered to students. In these circumstances, it is difficult to provide unequivocal verdicts on the success of the projects involved.

It should be recognised that, for most of the high school teachers, the 2016/17 academic year was itself far from “normal”, with new courses and specifications either being introduced or in preparation. Can any relevant statistics be quoted here, either in the school overall or in relation to one particular subject so as to illustrate our argument? The effects of this time of change in education were felt by the teachers in terms of their planning, with the burden of learning new and challenging subject knowledge for curricula to come an especially important factor.

The research team adopted the well-established qualitative principle that if their report provided sufficient background information with regard to the three fieldwork centres and the teachers employed within them, this material would help the reader

to understand the contexts in which the study took place. Lincoln and Guba (1985) refer to this contextual detail as “thick description” (p. 125). If any school leader elsewhere considers their own situation to be comparable to that described and if they believe that enough depth has been given in this report to the discoveries that have been made for them as the reader to have developed sufficient understanding of what took place, they may choose to relate the study findings to their own position. The research team, however, makes no claim that the organisations in which the fieldwork took place are typical of schools more generally, nor has any effort been made to explain the ways in which Whitley Bay High School may be considered representative of a broader body of schools. In the words of Firestone (1993), “The investigator’s responsibility ends with providing sufficient descriptive data to make such similarity judgments possible” (p. 18).

The team has attempted here to report in as much depth as is practicable the research methods that were employed. This enables another party to repeat in their own school the study that has been described, although not necessarily, of course, gain similar results. The phenomena that have formed the subject of this report will change over time and each school exists in its own context. Detailed description of the methods also, however, provides the transparency necessary for any scrutineer to determine how far proper research practices have been followed. To this end, coverage of the research methods has focused on the three key dimensions of

- the research design;
- the operational detail of data gathering;
- reflective appraisal of the study.

The team had hoped that an element of peer scrutiny could have been added to the study by writing for *SecEd* an article dealing with the work. They had envisaged that their piece would be published online and readers given an opportunity to make observations via the “comments” box that would appear beneath the piece. Ultimately, however, the idea of writing of an article for *SecEd* so soon was rejected on the basis that etiquette demanded that the Workload Challenge Study report should be presented to the NCTL, i.e. the body that had commissioned the work, before any related paper could be offered to an educational magazine or Web site.



## **Appendix 11: Specific recommendations in detail**

### **1. Set time aside for shared planning**

Easily the most important prerequisite is that a school's Senior Leadership Team must make time available during the working week for shared planning to take place. This is probably best achieved if the same weekly timeslot is allocated to the task.

### **2. Divide the work in such a way as to exploit teachers' specialisms**

In the Whitley Bay High study, many of the subject teams allotted individual areas to be planned according to the particular strengths of the members of staff within the department. In these situations, teachers were not only comfortable with the content involved, they relished the opportunity to work on areas they enjoyed. Nevertheless, it would seem that some subjects are more amenable to this type of treatment than others. The results of our research suggest that Maths, for example, is ill suited to division on this basis. In addition, on certain occasions, it may be difficult to achieve the desired fairness, as some teachers, in tackling their favoured areas, may be seen to be taking on more – or less – work than their colleagues.

### **3. Agree from the outset on the fundamentals, whilst remaining flexible to individual predispositions**

Perhaps the most basic decision lies in determining what will be actually be created – is it schemes of work, individual lesson plans or resources for use in the classroom? Once this matter had been resolved by the Whitley Bay High teachers, many of them noted in retrospect that firm decisions, achieved by consensus at the beginning of the shared planning initiative, paid off later as a reasonable degree of consistency in the work produced was achieved. The greater uniformity that was apparent in the lesson resources created frequently led to a “corporate style” which was appreciated by students, too. Once expectations are laid down, individual teachers may find themselves “raising their game” in terms of planning in order to ensure that their materials attain the same standards as those of their colleagues. It is also important to specify the depth that lesson plans should exhibit. If left to make their own decisions, some teachers will doubtless offer no more than brief plans, perhaps in the belief that recipients will tweak what they are given anyway, whilst others may think that since they are writing for an additional, less specialist readership the tacit knowledge that they routinely bring to bear when delivering a lesson will need to be made explicit. If the departmental groups become too large, there may be difficulties in forming a consensus whilst ensuring that everyone has an input. Within the stipulations that are made, a flexible attitude to how the documents are produced may need to be taken. For example, although many teachers will doubtless work on

their own when creating a lesson plan, some may be more inclined to work as one of a pair, with a trusted colleague.

#### **4. Encourage continuity and progression in the students' experiences**

In terms of the shared planning of lessons, there are, of course, various options available insofar as how the work can be organised. It may be that a scheme of work on a particular area is deconstructed in such a way that all members of the department contribute a lesson. Alternatively, each individual member of staff may be allocated a different scheme of work and be asked to prepare an appropriate set of lessons. Whilst both approaches have merit, the second option is more likely to promote continuity and progression from one session to another.

#### **5. Be prepared to make significant investment of time in the early stages**

Whilst the personal time savings associated with shared planning are often considerable in situations where a teacher devises one lesson themselves and receives several from their colleagues, a key finding of the Whitley Bay High study was that the early stages of the planning initiatives were time consuming. Even preparatory tasks such as background reading were onerous. On an individual level, many of the teachers were planning for new courses so they needed time to acquaint themselves with material that was unfamiliar to them. In addition, the groups tended to take a prolonged period to reach agreement on the fundamentals outlined in (3) above. Subsequently, where teachers were writing for colleagues who taught sets of different abilities, the provision of heavily differentiated material was especially demanding in terms of time. The problem of "overwriting" for the benefit of non-subject specialists has already been mentioned. Many staff felt the major time benefits delivered by shared planning would be most likely felt in around two years' time. For their part, the school's senior leaders were unequivocal in their belief that the initial investment of time would ultimately prove to be well spent and once the initial burst of planning activity was complete and curricula became more stable in the ensuing years, they expected the amount of time required for shared planning to fall very significantly.

#### **6. Build on the existing team spirit within subject departments**

It is difficult to see how shared planning can work unless there is already a strong ethos of collaboration in individual departments. Within any school there may well be a diversity of "mini-cultures" in the different departments and where teachers are used to operating entirely independently, senior leadership may have to put in place moves towards greater teamwork before shared planning can be even contemplated. In particular, an atmosphere of mutual respect and trust are essential if everyone in a department is to accept honest feedback that may be offered by their colleagues in relation to the materials they have prepared. Such feedback is integral to any

process of evaluation that leads to the continual improvement and refinement of the outcomes of the shared planning process.

**7. Make sure that everyone is on board**

Even when members of the team undertaking the shared planning project are based in the same department, this does not necessarily mean, of course, that all of them will be equally committed to the practice. Some may be newly qualified teachers who are unfamiliar with the method, others could have arrived only recently from schools where planning was regarded as an individual enterprise. A few may simply feel that the disadvantages outweigh the strengths.

**8. Accept that shared planned is no panacea**

Teachers should not embark on any shared planning initiative in the belief that it will be an antidote to all their existing problems in terms of preparation and resourcing. It brings many advantages but there are shortcomings, too. In an acknowledgement that there will be weaknesses as well as strengths, there may be a temptation to adopt shared planning initially on a trial basis, with in the first instance material associated with only one topic planned in collaborative fashion within a department. When this is done, the overall time savings are bound to be limited. Teachers should not lose sight, either, of the fact that it is unlikely that they will be able to adopt without modification any lesson that has been planned by another party, as they are bound to have to customise the material to suit the particular needs of their students or their own teaching style. Such tweaking may itself be time consuming.

**9. Ensure that the ICT infrastructure can support the demands that will be made of it**

If the Senior Leadership Team expects all staff to use their school's intranet or VLE to support the shared planning process, clearly the tool involved must be able to meet teachers' expectations with regard to criteria such as accessibility, speed, security and general robustness. If the approved tool proves unsatisfactory, this may well lead to variations in practice, with different teachers employing their own favoured approaches. In the Workload Challenge Study, these included *Google Docs* and *Padlet*, in addition to Whitley Bay High's own VLE.

**10. Make provision for staff in one-person departments to plan with colleagues elsewhere**

It may be unrealistic to expect teachers who are accustomed to planning by themselves to use their own time after school to work with their counterparts in other schools. This form of shared planning may be made more attractive if funds could be

made available to pay for supply cover, thereby liberating the individual involved to work with others during school hours.

© Crown copyright 2018

This publication (not including logos) is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

To view this licence:

visit [www.nationalarchives.gov.uk/doc/open-government-licence/version/3](http://www.nationalarchives.gov.uk/doc/open-government-licence/version/3)

email [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk)

write to Information Policy Team, The National Archives, Kew, London, TW9 4DU

About this publication:

enquiries [www.education.gov.uk/contactus](http://www.education.gov.uk/contactus)

download [www.gov.uk/government/publications](http://www.gov.uk/government/publications)