

# REDUCING ACCOUNTABILITY WORKLOAD IN YOUR WORKPLACE



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# FOREWORD

It is time for education professionals to be valued. It is time for their professional views, based on their experience and expertise, to be heard.

Stress and exhaustion are not only the products of excessive working hours but also having too little professional discretion in your workplace – with key decisions about the curriculum and teaching strategies taken out of your professional control.

Teachers in the UK work more intensively and for longer hours than any other profession. It is time to reclaim your professional lives.

*Kevin Courtney Mary W. Boustad.*

**Kevin Courtney and Mary Boustad**

Joint general secretaries, National Education Union



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# TIME TO TAKE ACTION

**It is time to act on unnecessary workload that is driven by in-school accountability. It is time to reform Ofsted, an inspectorate which is:**

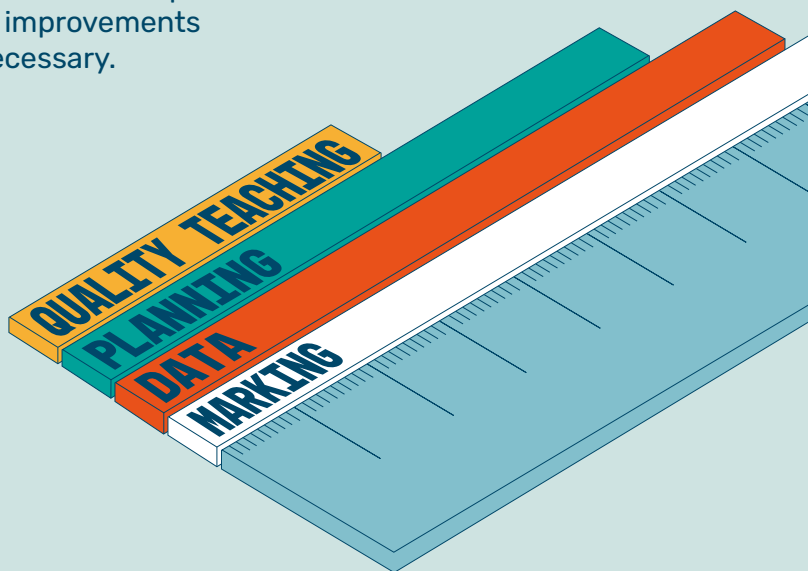
- driving good teachers and school leaders out of the profession, because of unmanageable stress levels;
- discouraging new teachers from entering the profession;
- exhausting teachers and leaders as they struggle to adapt to constantly changing inspection frameworks (four in five years);
- destroying the reputation of schools in deprived areas, which are doing good work under the most difficult of circumstances and have been let down by inadequate funding and support, with Ofsted consistently failing to call this out;
- imposing inspection frameworks which are untried and untested on schools, leading to poor inspection judgements;
- making schools the scapegoat for rising child poverty, which is the real enemy of learning and progress.

While these external pressures cannot be ignored, many of the accountability measures implemented in schools are not required by Ofsted or the Department for Education (DfE) and sit outside the bounds of the Burgundy Book, School Teachers' Pay and Conditions Document (STPCD) and contracted terms for support staff.

This document has been designed to support you and your colleagues to understand and identify what is causing additional workload in your workplace. It will help you to work collectively, to take action over unnecessary workload that is driven by in-school accountability, giving you and your colleagues more professional autonomy and control over your work. It includes guidance on some key accountability and workload issues, an audit tool for you to discuss workload and working practices, and guidance and model letters to help you raise the issues with your leadership team, bargain for improvements and escalate if necessary.

The National Education Union (NEU) believes that each issue listed in the following guidance must be agreed to before a school or college can be considered to be taking workload seriously. There has been a steady increase in workload over the years. By acting collectively, we can redress this and establish more acceptable professional standards.

For more information and to find the documentation discussed in this booklet, please go to [neu.org.uk/valueeducators](https://neu.org.uk/valueeducators)



[neu.org.uk/valueeducators](https://neu.org.uk/valueeducators)

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# SECTION 1:

## GUIDANCE FOR TEACHERS

This guidance relates to issues that members have consistently told us add to their workload and do not aid teaching and learning. We have explained what the NEU policy is and also, where relevant, where the Department for Education (DfE) and/or Ofsted have stated that these things are not required. Additionally, if there is specific reference in your terms and conditions (STCPD), that has been included. For more detailed guidance on each of these issues, please refer to our website.

### Mock inspections

**The NEU says:** Inspection by itself does not improve teaching or learning. Mock inspections, and preparation for them, can be disruptive and cause unnecessary stress and workload. There is no statutory requirement to participate in 'mocksteds'.

**The DfE and Ofsted say:** mock inspections and/or mock deep dives are unnecessary and a waste of time. Mock inspections or mock deep dives only add to staff workload and do not improve teaching or the educational outcomes of children.

Mock inspections and/or mock deep dives are not required by the DfE or Ofsted.

**You should not be asked to participate in mock inspections or mock deep dives.**

## Lesson plans

**The NEU says:** planning lessons is an essential part of every teacher's role. Objecting to unreasonable prescription and scrutiny is consistent with maintaining the highest standards of professional practice. Members should not be obligated to submit their lesson plans to members of the senior management team or anyone acting on behalf of the senior management team.

**Ofsted says:** it doesn't require individual lesson plans during an inspection, or past plans. Lesson plans are helpful to support effective teaching in the classroom. They should not be produced to simply satisfy external scrutiny. The DfE's Independent Teacher Workload Review Group specifically stated that detailed daily or weekly plans should not be a routine expectation.

**You should not be asked to plan your lessons in a particular format or routinely asked to hand in lesson plans.**

## Data collection

**The NEU says:** there is a tsunami of data recorded on pupils, much of which has little or no educational value. The NEU believes there should be agreed limits on pupil tracking and that teachers should not undertake exam results analysis or collate pupil reports.

**Data shouldn't be collected "just in case" or to be "ready" for Ofsted. Nor should data be collected "just because you can". It should have a clear purpose. Ofsted does not require a particular format or a particular frequency:** you should present any data in the format that schools would normally use to monitor pupils' progress. As a rule, the DfE recommends no more than two or three attainment data collection points a year.

**You should not be asked to collect or collate the same data more than once and there should always be a clear purpose for collecting the data you do.**

## Marking

**The NEU says:** although giving feedback to pupils is important, this does not necessarily mean written marking, or that it should be done in a prescribed manner, eg different colour pens. The school marking policy should be agreed and comply with the NEU guidance available on our website.

**The DfE says:** all marking should be “meaningful, manageable and motivating”. Ofsted and the DfE are encouraging schools to move away from excessive marking policies. There is no requirement from the DfE or Ofsted that teachers must provide written feedback and pupils should respond in writing. The DfE Workload Toolkit suggests practical measures schools can undertake to reduce excessive workload around marking.

**You should not be expected to routinely give or receive written feedback.**

## Reports

**The NEU says:** teachers should only produce one report per year for each of the pupils they teach, in writing or using an electronic comments bank.

**The DfE says:** lengthy written reports are unnecessary and do not engage parents or improve pupil outcomes. The DfE is encouraging schools to review their procedures to ensure they do not generate excessive workload. Reports to parents should not be onerous or taxing.

**You should not be asked to produce more than one report per academic year.**



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## Classroom observations

**The NEU says:** excessive classroom observation is one of the biggest sources of stress and does not of itself lead to better practice. It also adds unnecessarily to the workload of those undertaking the observations. These include observation during learning walks, pupil tracking/shadowing, departmental and subject reviews, pre-inspection visits, drop-ins, mock inspections, and any other initiatives which involve classroom observation.

Observations should be part of a collegiate, professional dialogue, with a maximum of one per term or three per year that should be no longer than an hour. There may be certain exceptions eg, ECT, intervention, ITT, formal capability etc.

**You should not have more than one observation per term.**

**You should have a minimum timetabled ten per cent PPA in appropriate blocks. It is for you to determine how your PPA time is best used.**

## Appraisal

**The NEU says:** the union advocates appraisal, which is developmental, supportive and based on a professional dialogue that aims to improve teaching and learning. The process should not be punitive, unfair or over-burdensome. For more guidance on appraisal systems, please visit the NEU website.

Appraisal should not add to staff workload or be used to prevent pay progression. For those not on capability, pay progression should be automatic and not linked to appraisal.

**You should not be asked to agree numerical targets as part of your appraisal, and it should not be used to prevent automaticity of pay progression.**

## Meetings

**The NEU says:** members should not attend any meetings which are not within directed time and where there is no published directed time calendar for the academic year, agreed with NEU members. The NEU believes meetings should only take place if they are necessary and have a clear agenda and purpose. Unnecessary meetings add to workload and are counterproductive.

To keep workload manageable and improve work/life balance, there should be one meeting per week and it should be no longer than an hour. Where possible, it should be planned in advance. Dates and meeting times should not discriminate against part-time or other employees.

**You should not be asked to attend more than one hour-long meeting per week.**

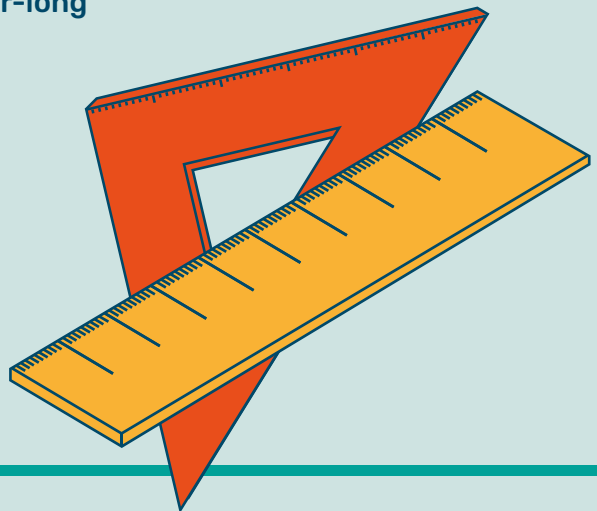
## Directed time

**The NEU says:** your school should have a directed time calendar, which has been negotiated and agreed with NEU colleagues in your workplace. All staff should have a directed time calendar including leadership and support staff.

The STPCD states that the maximum number of hours a teacher can be directed annually is 1,265 hours, pro rata for part-time teachers.

**You should not be directed to work beyond 1,265 hours and you should be able to access an agreed directed time calendar in your school.**

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## PPA Time

**The NEU says:** staff who undertake classroom teaching, including those on the leadership pay spine, should have a minimum ten per cent PPA time set out clearly in their timetable. The NEU believes ten per cent is a minimum, not a maximum. PPA should be in blocks of one hour as a minimum. Teachers cannot be required to carry out other duties during their PPA time. It should be for teachers to determine how this should be used.

**The STPCD states that PPA is a minimum of ten per cent of timetabled teaching time for full- and part-time teachers.**

## New policy initiatives

**The NEU says:** members should refuse to implement any new management-led policies and working practices, which have not been workload impact assessed jointly with union reps and leadership. Existing practices should be regularly reviewed to ensure they are necessary and do not create too much additional workload.

**You should not be asked to implement any new policies or practices that increase your workload without determining which initiative it will replace.**

## Teaching and Learning Responsibility Payments (TLRs)

**The NEU says:** teachers who are not in receipt of a TLR payment should not undertake any management responsibilities unless additional time to undertake such duties is made available in their timetable.

The STPCD has clear criteria for the payment of a TLR. Teachers should only undertake duties that meet the criteria for a TLR payment.

**You should not be asked to undertake additional responsibilities unless you are paid the appropriate TLR.**

## Cover

**The NEU says:** the STPCD requires teachers to cover “rarely, and only in circumstances that are not foreseeable” ie, in emergencies. Asking teachers to cover in other circumstances, such as for planned absences, is unacceptable. With regards to support staff, higher level teaching assistants and cover supervisors should be used for cover, and this should be rare and only for unforeseen circumstances.

**You should not be asked to cover in any situation that is not a genuine emergency.**

## Lunchtime supervision

**The NEU says:** teachers should not undertake supervision of pupils during the lunch break.

The STPCD states that teachers are not required to undertake lunchtime supervision.

**You should not be asked to supervise pupils during your lunch break.**

## Exam invigilation

**The NEU says:** teachers should not invigilate any public examination, including GCSEs and SATs. Nor should members agree to undertake the invigilation of any ‘mock’ examinations.

The STPCD states exam invigilation is specifically prohibited for those covered by STPCD. Schools and colleges should have a team which can be assembled as and when required by the examinations officer.

**You should not be asked to invigilate any exams.**



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# SECTION 2:

## GUIDANCE FOR SUPPORT STAFF

The professional needs of our support staff membership need to be included in meetings with management.

Support staff roles vary so much that a detailed discussion with members in your school should precede any approach to management ie, the specific concerns of IT technicians may well be different from those voiced by teaching assistants

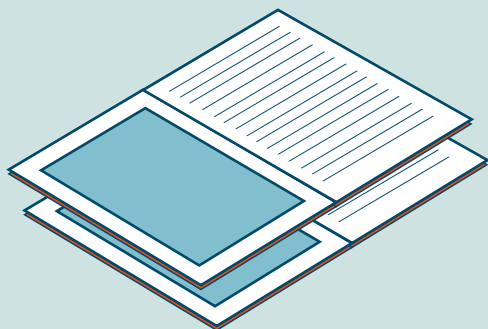
However, we believe that the following issues are the main ones likely to be raised by members.

### Job descriptions

**The NEU says:** you should have an up-to-date job description that accurately reflects the work you do. If it does not, you should seek a review to have any additional tasks that you perform included in your job description and consider whether they merit additional pay.

'Grade drift' is a growing problem, whereby support staff take on responsibilities that are over and above their pay grade, but without appropriate recompense.

For more information go to:  
[neu.org.uk/support-staff](https://neu.org.uk/support-staff)



[neu.org.uk/valueeducators](https://neu.org.uk/valueeducators)

## Contractual hours

**The NEU says:** you should only work your contractual hours. Any additional working should be on a voluntary basis and paid at overtime rates.

Too many support staff are expected to work beyond their contracted hours without additional payment, and 'job creep' is becoming increasingly common, with support staff given additional duties without additional hours to ensure commensurate payment.

## Cover for teachers

**The NEU says:** unless it is your specific job role ie, you are employed as a HLTA or cover supervisor, you cannot be forced to cover for an absent teacher.

And even if you are an HLTA or cover supervisor, there are strict limits on the amount of cover you can provide.

## Career development

**The NEU says:** your employer should provide high quality career development opportunities for staff, including those in support roles.

School budgets should not discriminate against support staff CPD, and inset days should take into account the whole school workforce.

For more information go to:  
[neu.org.uk/support-staff](https://neu.org.uk/support-staff)



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## SECTION 3: WORKLOAD AUDIT

The first step is for you and your colleagues to organise an NEU members' meeting in your workplace to discuss this document and workload issues. Although this is primarily concerned with teacher workload, we know that it's an issue for all school staff and it should be discussed in that context.

During your meeting, use this audit tool to identify the drivers of workload in your workplace. It will help you determine whether your school/college is following NEU, DfE and Ofsted guidance to reduce workload.

If you can answer 'yes' to most of the points listed in the audit tool, your school is taking serious steps to reduce workload. However, this does not mean that there are no other workload issues of concern to you and your colleagues. Meet and discuss those issues, raising them with your head if necessary.

We would love to hear from you if you have said 'yes' to all the points on the audit – it will be invaluable and inspirational to other groups, reps and members to hear about schools and colleges where workload has been taken seriously and reduced.

If you and your colleagues answered 'no' to any of the questions below, these are the issues to prioritise and take forward for discussion and negotiation with your head/SLT.

For help on organising a meeting go here:  
[neu.org.uk/how-organise-great-workplace-meeting](https://neu.org.uk/how-organise-great-workplace-meeting)

## Mock inspections

- Your school has agreed not to undertake mock inspections and/or mock deep dives to prepare for Ofsted.

## Lesson plans

- Teachers are free to use their professional judgement when deciding how to plan lessons.
- Teachers are not obliged to submit lesson plans to members of the senior management team or anyone acting on their behalf.

## Data collection

- There are strict and agreed limits on pupil tracking in your workplace.
- There is a clear and identifiable purpose for collecting this data.
- Your school has reviewed its data collection practices to ensure they comply with the DfE Workload Advisory Group recommendations.

## Marking

- There is shared agreement about what manageable, meaningful and motivating marking looks like in your school.
- Teachers are not required to provide feedback in a particular style and can exercise professional judgement in how they provide feedback to pupils.
- There is a marking policy in your workplace that has been agreed with you and your colleagues and complies with the NEU guidance.

## Reports

- There is a limit in your workplace of one report per year for each of the pupils you teach, in writing or using an electronic comments bank.
- The communication strategy with parents has been agreed with staff to ensure it is in line with DfE guidance and does not add to teacher workload.



## Classroom observations

- There is a limit on the number of observations to a maximum of one per term or three per year for no longer than an hour in duration? (NB. there may be certain exceptions for trainee teachers, early career teachers (formally known as NQTs), intervention, those on formal capability).
- Observations are part of a collegiate, professional dialogue.

## Appraisal

- The appraisal policy has been agreed with you and your colleagues.
- Appraisal objectives are SMART ('specific, measurable, achievable, realistic and timebound') and limited to three per year.
- Data driven targets are excluded in appraisal objectives.
- Annual pay progression is automatic, non-discriminatory and is not linked to appraisal (NB. This may not include

those on capability or in the middle of a performance review process).

## Meetings

- There is a maximum limit of one meeting no longer than an hour per week in your workplace.
- Meetings are included in the directed time calendar, which has been agreed with NEU colleagues in your workplace.

## Directed Time

- There is a directed time calendar, which has been negotiated and agreed with NEU colleagues, in your workplace annually.

## PPA Time

- Teachers have their contractually guaranteed minimum ten per cent PPA time clearly identifiable in their timetables.
- PPA time is in blocks of one hour as a minimum.

- PPA time is protected and teachers are not asked to carry out other duties during that time.
- Teachers are free to determine how PPA time is used.

### **New policy initiatives**

- All new management-led policies and working practices are workload risk assessed and agreed before they are implemented.
- All existing policies and working practices have been reviewed to ensure they are necessary and workload lite.

### **Teaching and learning responsibility payments (TLRs)**

- Teaching staff in receipt of a TLR also receive dedicated time in their timetable to support the discharge of their responsibilities.
- Teaching staff who don't receive a TLR are not obliged or required to undertake management activities.

### **Cover**

- Teachers are only obliged to cover "rarely, and only in circumstances that are not foreseeable" ie, in genuine emergencies and not for planned absences.
- HLTAs and cover supervisors can only stand in for teachers on a strictly limited basis.

### **Lunchtime supervision**

- Teachers are not required to undertake supervision of pupils during the lunch break.

### **Exam invigilation**

- Teaching staff are not required to invigilate any public examinations, including GCSEs and SATs.
- Teachers are not required to invigilate any 'mock' examinations where the school has reorganised the timetable to replicate the external examination process.



## Admin/clerical tasks

- Teachers do not routinely carry out tasks that do not require the professional expertise and judgement of a teacher.

## Job description

- Support staff have up to date job descriptions that accurately reflect the work they do.

## Contractual hours

- Support staff are not required to work beyond their contractual hours, and, if they are, they receive the appropriate overtime payments.

## Career development

- Support staff are given high quality professional development and inset days are focussed on whole school development.

## Any other workload issues?

We know that each workplace is different and there may be other workload concerns you would like to raise as a union group.

List these here:

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## SECTION 4: RAISING ISSUES WITH YOUR HEAD/SLT

After you've carried out the audit, you and your colleagues will be able to identify key areas of concern. If there are lots, you may want to initially prioritise the two or three issues that you collectively agree cause the most unnecessary workload.

Once you have all agreed which of the issues you wish to raise with your head/SLT, the rep/s need to arrange a meeting with the head. See the model Stage 1 letter: [neu.org.uk/valueeducators](http://neu.org.uk/valueeducators)

As reps, you may already have scheduled regular meetings with your head, known as Joint Negotiation and Consultation Committee (JNCC) or more informal meetings, as and when there is an issue. We would also

encourage you to talk to other union groups in your school and work together to demand changes to reduce workload.

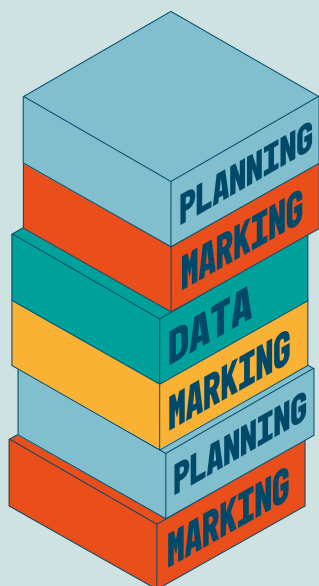
Very often discussions with the head will lead to positive changes in your workplace. After the discussions, it is important reps hold another members' meeting to feed back and gain their agreement. You should also take the time to celebrate your success and decide which issues you will prioritise next.

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# SECTION 5: ESCALATING ISSUES

If meetings with your head/SLT do not result in a workload reduction in the areas identified in the audit, hold another meeting of your NEU colleagues to discuss how to escalate and to identify possible measures you and your colleagues can take to win the reductions in workload you deserve.



It is important at this meeting to understand the strength of feeling of members, so the next course of action can be taken collectively. There are a number of options to escalate, which will range from collectively deciding not to participate in certain activities to balloting for action. Please contact your local branch or regional office which will be able to support you and discuss the options open to you: [neu.org.uk/contact-us](https://neu.org.uk/contact-us)

[neu.org.uk/valueeducators](https://neu.org.uk/valueeducators)

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# APPENDIX A: FLOW CHART OF STEPS YOU CAN TAKE

## Step one

Hold an NEU meeting, complete the audit and highlight which points are statutory requirements.

## Step two

As a group prioritise the two or three issues you want to raise with the head/SLT first. Knowing how strongly members feel and whether they are prepared to take any action if necessary should inform this process. It will also help you prepare to consider the options in step five.

## Step three

Adapt and send the stage 1 model letter to your head to arrange a meeting or add workload to the agenda of your regular JNCC.

## Step four

Discuss and agree changes with your head/SLT to reduce workload in the areas identified by your group.

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### Step five

Hold a members' meeting to discuss the outcome of negotiations. Contact your branch or regional office to discuss the support they can offer to escalate your campaign to win a workload reduction in your workplace.

**Outcome A:** Congratulations! If your head/SLT agrees to all the changes suggested by your NEU group, hold another NEU meeting to celebrate the success and decide which workload issues you will prioritise next

**Outcome B:** If you come to agreement on some but not all of the issues raised by your NEU group, hold another NEU meeting to decide your next steps (accept the outcome or escalate)

**Outcome C:** Your head/SLT don't agree any changes to reduce workload in the areas your group has identified. Hold a members' meeting to decide whether to escalate.

### Step six

Hold a meeting and go through the options for action. As a group, decide which actions you would be prepared to take win a reduction in workload.

### Step seven

Get in contact with your local branch about escalating further with your union group, this may include a letter signed by a clear majority of NEU members (70 per cent or more).



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