**UNIVERSITY OF WALES INSTITUTE CARDIFF**

**CENTRE FOR APPLIED EDUCATION RESEARCH**

# EVALUATION OF THE CHARTERED TEACHER PILOT IN WALES

## EXECUTIVE SUMMARY

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## 1. Introduction

1.1 In 2005 the General Teaching Council for Wales (GTCW) recommended to the Welsh Assembly Government that a Chartered Teacher (CT) Programme should be introduced into Wales. In 2006 the Assembly Government agreed to allow funding that it had already provided to GTCW to be used to pilot a CT Programme.

1.2 The initial pilot of the programme took place between 2007 and 2009 and an extended pilot will take place in 2009-10. This evaluation is of the initial pilot only.

1.3 The **key features** of the pilot programme have been:

- The Standards for CT which were developed by GTCW following a consultation process.
- A Programme Route to CT status aimed at classroom teachers and middle leaders, ultimately to be based upon twelve modules of which ten have been piloted.
- A Portfolio Route to CT status whereby very experienced teachers would submit evidence to demonstrate that they met the standards.

1.4 The pilot of the **Programme Route** has had the following features:

- Higher education (HE) accreditation of the modules.
- Partnership delivery of the modules between HE institutions and local authorities, with the intention of allowing an appropriate blend of theory and practice.
- Availability of modules throughout Wales.
- A wide range of delivery methods.

1.5 The pilot of the **Portfolio Route** had the following features:

- Teachers would be required to submit a portfolio of evidence and a reflective report.
- They would be supported by advisers/assessors in preparing these documents.

1.6 The key **objectives** of the pilot were:

- To pilot elements of the two routes towards the achievement of CT status.

- To provide a series of positive learning experiences focused on the needs of classroom practitioners and middle leaders who aspire to excellence in their professional learning and practice.
- To manage the pilot in such a way as to test out the perceived benefits of a CT Programme in Wales and highlight the lessons that can be learnt for the future.
- To enable the Council and its partners to address critical issues in the design and development of a CT programme in Wales, and to identify potential solutions.
- To test out the Council's proposals for the programme, as set out in the tender documentation for the Programme and Portfolio Routes.
- To put in place efficient and effective systems for the management of the programme in terms of contractual relationships, provider networks and partnership development.

1.6 As the result of a selection process undertaken by GTCW, eight participants were chosen to undertake the Portfolio Route and between 12 and 16 teachers for each of the modules.

## 2. Details of the Pilot

2.1 122 teachers took part in the pilot: 8 through the Portfolio Route and 114 via the Programme Route.

2.2 Teachers on the portfolio route were supported by advisers/assessors who took them through a managed process up to the point when they submitted their portfolios and reflective reports. Seven of the eight teachers submitted these and of the seven, five were assessed to have met the standards.

2.3 Five modules on the Programme Route were offered in each of the two years of the pilot. Approximately 90% of participants completed them.

2.4 Providers of both routes were funded directly by GTCW and teachers, who did not have to meet any course or tuition costs, were provided with the following additional financial support by GTCW:

- On the Programme Route, supply cover at £155(2007/08) and £165 (2008/09) per day for up to five days, to cover attendance at sessions and study days and reasonable travel and subsistence expenses.
- For the Portfolio Route supply cover at £155 (2007/08) and £165( 2008/09) per day for up to ten days, including time to meet with the adviser/assessor and time to prepare the portfolio and reasonable travel and subsistence expenses.

## 3. The Evaluation

3.1 Following a competitive tendering process, GTCW commissioned an independent evaluation of the pilot from the Centre for Applied Education Research at UWIC.

3.2 The **objectives** of the evaluation were agreed as being to establish the:

- Extent to which the objectives of the pilot programme had been fulfilled.
- Efficiency, effectiveness and appropriateness of the design and delivery of the pilot programme.
- Degree to which the pilot programme was relevant to classroom learning and teaching pedagogy.
- Contribution of the programme to the professional development and practice of participants.
- Extent to which an appropriate balance between educational theory and professional practice emerged from the provider partnerships.
- Degree to which the programme appeared to contribute to school improvement and effectiveness.
- Contribution of the pilot to developing approaches to distributed leadership.
- Extent to which the programme had led to the creation of a professional learning community of CT.
- Extent to which, overall, the perceived benefits for participants (experienced classroom teachers and middle leaders) had been met.

3.3 The research methodologies employed in the evaluation were:

- A review of relevant policy and research evidence.
- A questionnaire survey of all participants.
- Face-to-face interviews with a sample of all participants and all providers.
- Telephone interviews with a sample of participants.
- Observation of teaching sessions for some modules on the Programme Route.
- Consideration of module/route documentation.
- Consideration of management reports to GTCW from providers.
- Attendance at provider meetings.
- Interview with a group of Directors of Education.

3.4 All providers have been interviewed and the views of 75% of participants on the Portfolio Route and at least 66% of teachers on the Programme Route have been captured. Thereby it can be claimed that the findings and recommendations arrived at in the evaluation are based upon a robust evidence base.

## 4. Review of Policy and Research Evidence

4.1 A wide-ranging review of international research evidence and of policy developments that have salience for the introduction of CT was undertaken.

4.2 It arrived at the following findings:

- High quality teaching is the fundamental basis of educational success and progress at individual, institutional and system level.

- CPD has a major role to play in producing and maintaining high quality teaching and for this to be achieved requires a focus on collaborative professional development located mainly within schools.

- School leadership is critically important to supporting high quality teaching and professional development. New forms of leadership are emerging in schools which provide opportunities for the leadership of teacher pedagogy and professional development.

- This is leading educational systems across the world towards constructing new roles for expert teachers who can undertake the leadership of teacher pedagogy and professional development at school level. These roles are based upon the identification of a series of attributes that can be seen to exemplify expert teaching.

- The role of Advanced Skills Teachers in England offers one model of how such teachers can be made operational within an education system.

- The Teacher Learning Academy in England provides a reflective/enquiry based model of CPD that could be deployed by school based leaders of teacher pedagogy and professional development.

- The Master of Learning and Teaching in England potentially provides a structured system of profession-wide CPD focused on improving teacher quality and pedagogy. It will allow expert teachers a prominent role as coaches for the teachers undertaking the programme.

- The introduction of CT status in Scotland whilst generally welcomed as an investment in teacher quality and professional development also raises a number of fundamental questions in relation to the areas covered above, in particular whether it is intended as a route for ‘competent’ or ‘expert’ teachers and the role that might be performed by CT within the teaching profession?

- Within the wider context of education reform and the development of the teaching profession set out above and the specific context of the School Effectiveness Framework, there would appear to be considerable potential for the role of CT within the education system in Wales.

- The critical questions which appear to need addressing in order to achieve this are:

    - How can the concept of CT be aligned to the identification of expert teachers within the profession?
    - How can a role be developed for CT as leaders of teacher pedagogy and professional development at school and system level?

## 5. The Main Findings of the Evaluation

5.1 GTCW has undertaken the pilot in an efficient and inclusive way. The outcomes should prove to be extremely useful in any future development of the CT programme in Wales.

**The Portfolio Pilot**

5.2 The pilot of the Portfolio Route suggests that it can be an **appropriate means** of recruiting potential CT and enabling them to demonstrate that they meet the Standards for CT. Generally the teachers who have undertaken the pilot have found it an enjoyable and rewarding experience.

5.3 There appear to remain a number of issues about the criteria and process for **recruiting** teachers to this route. These are set out in the full report.

5.4 The process of organising **the portfolio** around the exemplification of key experiences is a good basis for demonstrating the standards, but might be strengthened through:

- A framework for the key experiences which reflects the key attributes sought in CT.
- A stronger emphasis on demonstrating outcomes linked to student achievement and school improvement.
- A limit on the use of a single piece of evidence to exemplify standards.

5.5 The **Standards for CT** are a useful framework, but as they have been used during the pilot they are not currently fit for purpose as a means of guiding the collection, exemplification and assessment of evidence.

5.6 The **support and guidance** system in place has been successful at the level of adviser /assessor support, but the potential value of the VLE and a professional learning community has been less well developed.

5.7 The role of **Advisers/Assessors** as undertaken within the pilot is an appropriate one and is capable of further development.

**The Programme Pilot**

5.8 The general **motivation** of all the teachers who participated in the pilot was a desire to develop their professional experience and competence. A majority (c 75%) believed participation would assist their desired progression to whole- school senior leadership. Only a quarter of teachers saw participation in the pilot as an opportunity to seek recognition of expert teacher status and to develop future career opportunities associated with this.

5.9 The following issues arise in relation to the **organisation** of the modules :

- The existence of a strong regionally-based provider partnership between local authorities and higher education institutions.
- Their utilisation of a variety of learning and teaching approaches.
- The potential workload of participants.
- Access for participants to university library facilities and virtual learning environments.
- The role of school-based mentors/coaches.

5.10 The following conclusions can be drawn about the impact of the route on the **learning and teaching pedagogy** of those teachers involved:

- In a number of instances teachers were introduced to areas of leading edge pedagogy which have challenged and informed their practice.

- Participants particularly valued the opportunity to learn from the varied experience of their colleagues.

- The actual impact of this generally rich experience on their teaching competence and student learning is reported to be a positive one, but such evidence is largely untested and should be explored further in any future research and evaluation on the impact of the CT programme.

5.11 The potential for **professional learning communities** being established as a way of promoting collaborative learning has to some extent been promoted and facilitated in modules on the pilot of the Programme Route. Where this has been the case they have generally been successful and have contributed significantly to the quality of modules.

5.12 In the majority of cases modules appear to have had the right blend of **theory and practice**. Those which achieved this balance were also those where the university/local authority partnership was strong. The standards for CT potentially have a useful role to play in signalling how this balance can best be achieved.

5.13 CT offers considerable potential for developing a distinct **leadership role** related to teacher pedagogy and CPD at school and local authority level. In order for this to be developed, far greater clarity is needed on the designation/nomenclature 'middle leadership' in relation to establising more distributed forms of leadership.

5.14 The following were significant examples of where modules contributed to **school improvement and effectiveness:**

- The sharing of effective practice by teachers across-phase and between secondary subject areas.
- The greater awareness and application of effective pedagogy that teachers have gained from the content of most of the modules.
- Action/classroom research based assignments that have led to discrete interventions designed to achieve school improvement.

5.15 Module **assignments** were found to be most fit for purpose where they achieved the right balance between background reading and an action/classroom research focus. Learning journals proved to be an effective way of teachers undertaking evaluation and reflection associated with such assignments.

5.16 The following can be said in relation to the **Standards for CT** as they operated on the pilot of the route:

- As they have been used by providers during the pilot, the current standards do not appear to be fit for purpose.

- The most effective usage of the standards by providers was as a:

  - ✓ Means of diagnostically and formatively assessing teachers.
  - ✓ Central feature of the learning objectives and pedagogy of each module.
  - ✓ Basis for collaborative discussion and exemplification with teachers.

5.17 On the basis of the pilot, the following can be said In relation to **academic accreditation** of modules:

- Many teachers on the pilot programme did not appear to be interested in academic accreditation of the programme, but a significant number did believe that it should be accredited.

- Those who were interested in academic accreditation believed that each module should be at level 7 with 30 credits available.

- There are considerable inconsistencies and apparent inequities in the way that higher education institutions have awarded credit.

5.18 **Other significant issues** which have arisen are:

- A strong case can be made for core modules to include those on research and enquiry and ICT pedagogy.

- There appears to have been inconsistency in the provision of core modules by different providers, although some of this variety was an intended part of the pilot.

- The need for a more personalised route building upon a diagnostic assessment of the strengths and areas for development of the teachers recruited.

- The need for career and financial incentives to be provided in order to make CT status attractive.

5.19 The overall **strengths** of the pilot of the route have been:

- Generally the modules have provided good quality experiences for the teachers involved and in a number of cases they have been of outstanding quality.

- The highest quality modules were characterised by:

  - ✓ Coverage of innovative pedagogy.
  - ✓ Accomplished teaching.
  - ✓ Strong partnership working between higher education and local authorities.
  - ✓ An appropriate balance between theoretical and practical approaches.
  - ✓ Organisation that fitted well with teachers working lives and allowed quality time for reflection and research.
  - ✓ A strong element of action/classroom research that provided opportunities for leadership of other colleagues and contributions to school improvement.

  A number of teachers who had previously undertaken 'middle leadership' courses compared very favourably the module/s they had studied on the CT pilot.

- Teachers particularly welcomed the opportunity to work collaboratively with colleagues from other phases and schools.

- Some of the work undertaken by teachers has been outstanding, indicating that some expert teachers have been recruited to the programme.

- The involvement of higher education institutions allowed teachers access to academic resources that they would otherwise been unable to use.

5.20 The overall **shortcomings** of the pilot of the modules were:

- One module was unsuited to the CT programme. This and two other modules did not display most of the qualities set out in 5.19 above. In particular two of the modules did not involve the active partnership of a local authority provider in the way that had been contracted for with GTCW.

- As they have been used by providers on the pilot, the Standards for CT have not proved to be fit for purpose.

- A significant number of the teachers recruited to the pilot do not appear to have been ‘expert practitioners’.

- There has been inconsistency and apparent inequity between HE providers in relation to academic accreditation.

## 6. Recommendations

6.1 In order to take forward the development of the CT programme in Wales, building upon the impetus that has been achieved during the pilot, it is the view of this independent evaluation that the GTCW should consider and promote the recommendations that follow.

**Implementation and Delivery**

6.2 The **Welsh Assembly Government** should, as part of its current review of CPD and leadership programmes, consider a full implementation of the CT Programme in Wales on the basis that it has considerable potential for:

- Further developing the quality of teaching in schools.
- Providing a leadership role for expert teachers at school and local authority level.
- Supporting the School Effectiveness Framework and the Pedagogy Strategy.

Given the current uncertainty about the future of the CT programme in Wales, this recommendation should be considered with some urgency.

6.3 **The Welsh Assembly Government** should remit:

- The General Teaching Council for Wales to undertake the overall management of the programme, including its promotion with teachers, schools and local authorities, the Standards for CT and the award of CT status.

- The four local authority consortia in Wales, working in partnership with designated higher education institutions in their region, to undertake the delivery of the programme, including recruitment, the provision of modules and of support to teachers.

6.4 **The Welsh Assembly Government** should, working with the GTCW, local authority consortia and higher education institutions, take the lead in drawing up the agreed attributes of expert teachers that would form the essential

criteria for the selection of teachers for the CT programme. These attributes should be founded upon the following characteristics of expert teachers:

- Excellence in classroom teaching.
- Leadership of colleagues in pedagogy and CPD.
- Work undertaken with agencies external to the school.

**The Standards for Chartered Teacher**

6.5 **The General Teaching Council for Wales**, working with the local authority consortia and higher education institutions, should undertake a revision of the existing Standards for CT in order to strengthen their fitness for purpose. This should be to provide both a diagnostic and formative tool for use in selecting teachers for the programme and the work they undertake as part of it and as a summative basis for the award of CT status.

6.6 **The General Teaching Council for Wales**, working with local authority consortia, will need to consider how teachers who achieved Chartered Teacher status should maintain that status over time through demonstrating their ongoing experience and achievement in relation to the characteristics set out in 6.4 above.

**Academic Accreditation**

6.7 **The Welsh Assembly Government**, as part of its current review of CPD and leadership programmes, in alignment with the School Effectiveness Framework and in order to encourage teachers in Wales to seek academic accreditation for their CPD activities, should consider establishing a National Framework for the academic accreditation of CPD in Wales. This framework should be developed through joint work with local authority consortia and higher education institutions. Thereafter all funding allocated to higher education institutions for CPD courses for teachers, through the Higher Education Funding Council for Wales, should be aligned to this framework. It is within this context that the CT Programme in Wales could be best taken forward.

6.8 **Local authority consortia and higher education institutions** involved in the delivery of the CT programme should actively facilitate the achievement of academic accreditation by teacher participants. This should be achieved as a summative exercise at the end of the programme, simultaneous to the

assessment of teachers against the standards for CT, aligned to the National Framework for CPD Accreditation proposed in 6.7 above. Thereby, the CT programme would simultaneously:

- Be for teachers who already have a Master's qualification (particularly on the Portfolio Route).
- Be for teachers who are already attempting to achieve Master's status.
- Assist teachers who were trying to gain Master's status, through allowing their work to gain accreditation.
- Not, however, lead automatically to a Master's degree and would not require teachers on the Programme Route, if they did not wish, to pursue such an option.

Thereby, the principle would be clear that the CT programme was based on professional standards that could be articulated and accredited against academic standards and not vice versa.

**The Routes to Chartered Teacher**

6.9 **The General Teaching Council for Wales** should continue to offer two routes to the achievement of CT status: a Portfolio Route and a Programme Route. Whilst, as in Scotland the availability of the portfolio route might be time-limited (to perhaps 2015), an opportunity should continue to exist thereafter for teachers to achieve CT status through a more flexible mechanism than the programme route.

6.10 **Local authority consortia**, working with the GTCW, should establish criteria that supported by a diagnostic assessment based upon the revised standards, determine the recruitment and allocation of teachers to the Portfolio or Programme Route. In essence these criteria should define:

- *The Portfolio Route* as being appropriate for those teachers who are able to demonstrate robust evidence of their expert teacher status, aligned with the characteristics set out in 6.4 above and who, thereby, should be able to assemble the evidence to be successfully assessed against the Standards for CT.

- *The Programme Route* as being appropriate for those teachers who, whilst they are able to demonstrate sufficient evidence of their aspiration to be regarded as of expert teacher status (for which they should be able to gain accreditation of prior learning for up to one-third of the route) are judged to be in need of the reinforcement and further

development that the route would offer to enable them to be successfully assessed against the standards for CT status.

6.11 **The General Teaching Council for Wales** should, as part of its re-design of the CT Programme consider that the overall structure of the CT programme should be one of six modules, thereby dispensing with different categories of core/optional/work-based modules. The six modules should be:

- Self Evaluation and Reflection
- Research and Enquiry.
- Learning, Teaching and Assessment
- Education for All
- ICT Pedagogy
- Leading Pedagogy and CPD

This would allow on the Programme Route, two modules to be taken each year and CT status to be achieved in a maximum of 3 years through this route. This would meet the concerns of teachers on the pilot regarding the excessive workload involved if CT status took up to six years to achieve and the likelihood that this would deter appropriate teachers from applying. The modules should be conceived as being able to attract 30 academic credits through the proposed National CPD Framework. Those seeking APL ( via the proposed National Framework for CPD accreditation) through the Programme Route would be able to do so by substituting up to two modules, not to include those on Self Evaluation and Reflection and Research and Enquiry, which should be regarded as compulsory. Teachers on the Portfolio Route should be required to pursue the module on Self Evaluation and Reflection prior to compiling their portfolio.

6.12 **Local authority consortia** in selecting teachers for the Portfolio Route should also take into account:

- The desirability of teachers already holding a Master's qualification as an indication of their high level CPD activity or having undertaken some other experience with a commensurate level of challenge.

- The undesirability of teachers taking any other form of professional qualification/ training simultaneously with following the route.

6.13 **Local authority consortia** should in relation to the use of the portfolio on the Portfolio Route:

- Use the characteristics of expert teachers, as set out in 6.4 above, as a framework for the three key experiences to be exemplified.

- Ensure that teachers place a strong emphasis on demonstrating outcomes linked to student achievement and school improvement.

- Limit the number of times that a single piece of evidence can be used to exemplify standards.

6.14 **Local authority consortia and their higher education partners** should provide advice to those undertaking the Portfolio Route in relation to the development of their portfolio and their reflective review.

6.15 **The General Teaching Council for Wales** should appoint Assessors for both the Portfolio and Programme routes to make summative judgements on whether teachers have met the Standards for CT. These assessors should be drawn from those who have been involved in delivering both routes and who should work together collaboratively to ensure consistency in the application of the standards. In order for the professional credibility and currency of the CT award to be demonstrated, a significant proportion of the Assessors should be outstanding practitioners themselves, including in due course, Chartered Teachers. A Chief Assessor should be appointed to monitor and calibrate standards overall. That person should be independent of the delivery of the CT programme in Wales.

6.16 **Local authority consortia** in relation to the organisation of the modules on the Programme Route should:

- Ensure that each module is available locally to avoid difficulties in access for teachers.
- That a variety of learning and teaching approaches are available across the modules.
- That the learning and teaching pedagogy deployed itself models the expert practice that teachers are being asked to exemplify and the examples of high quality that have been identified on the pilot programme.
- That the quality assurance of the delivery of modules is monitored across the consortia providers.
- That a strong and active partnership exists with the regional higher education institutions that they work with.
- That full ease of access is provided to HE library and other learning facilities.

- That within and across modules teachers are encouraged to collaborate and to form professional learning communities.

6.17 **Local authority consortia** should develop the role of school-based mentors/coaches so that all those teachers undertaking the CT programme, through either route, can be supported by an existing expert practitioner ( in time a Chartered Teacher) from their own or a nearby school.

**The Role and Status of Chartered Teachers**

6.18 **The Welsh Assembly Government and its local authority partners** will need to give consideration as to the career and financial incentives that should be put in place if the role of CT is to develop in the way that has been proposed above and particularly in relation to improving teacher quality and student outcomes in schools. In this respect, the role of Advanced Skills Teachers appears to be a model worthy of consideration and adaptation. In Wales CTs might be released from their teaching commitments for up to one-third of their time to work with colleagues in their own schools, through their local authorities with teachers and schools elsewhere in their area and via their local authority consortia with schools across their region. The potential for CT across Wales forming a discrete Professional Learning Community on which the Welsh Assembly Government could draw in taking forward education policies such as the School Effectiveness Framework also appears to have considerable potential. The emergence of such a system-wide role for CT can be seen to be salient with the findings of the policy and research review and the discussions with providers and Directors of Education undertaken as part of this evaluation.

6.19 **The Welsh Assembly Government** and its local authority partners, prior to remitting GTCW and the local authority consortia to take forward the CT Programme in Wales, should give consideration to the operational and funding issues associated with the training and deployment of CT in the way that has been proposed above. This consideration should include:

- The approximate number of CT who would be within the education system in Wales at any one time.
- Would it be expected that every secondary school would have at least one CT?
- Would it be expected that groups of primary schools would have access to a CT?
- What proportion of CT would be produced by the portfolio routes and the programme routes?

- If the Portfolio Route was time- limited to 2015, would the Programme Route, thereafter, be a way of topping up the number of CT within the system? As such the logistics of offering the modules, given the likely numbers involved, would suggest that the local authority consortia would need to collaborate in providing regional/national delivery.
- How the CT programme was to be funded?

6.20 **The Welsh Assembly Government** should in due course commission evaluative research on the impact of CT on raising quality and standards in schools.