

# Teachers before the 'Threshold'

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## **Abstract**

During summer of 2000, the government will introduce a new system of pay and performance management for teachers. The CEP is conducting a 'before-and-after' panel study of teachers and schools to ascertain its effects on motivation and performance. This paper reports preliminary findings from the first wave of the survey, before the introduction of the new system. The likely effects of the new system, on the basis of these results, are examined from the point of view of motivation and work behaviour, and potential recruitment. The danger of widespread de-motivation is a serious one, and it is essential that the new scheme is seen by teachers to operate fairly and to provide the necessary support to teachers wishing pass the 'Threshold'. A key role is envisaged for the teachers' unions in building teachers' confidence that the scheme will be operated fairly, and this, it is argued, fits with the government's views on the benefits of labour-management partnership.

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## 1. Performance, pay and partnership

*'The Government wants a world-class education service for all our children'.*

The opening sentence of the Green Paper *Teachers: meeting the challenge of change*<sup>1</sup> expresses the manifold pressures on our education system to provide the skills our children need in a fast-moving global economy while at the same time stressing the need for social inclusiveness. A distinguished French politician summarised his country's response to the shifting balance in the world economy saying 'we have no oil, but we have ideas'<sup>2</sup>. As the former US Labour Secretary, Robert Reich, argues, jobs in the advanced industrial countries depend increasingly upon our human capital, and hence on the quality of our educational systems<sup>3</sup>. The question is how to deliver this with a workforce of teachers who feel and are widely seen as under-paid and under siege.

To address these problems, the Government has proposed to raise teachers' salaries substantially, but selectively, by introducing a 'Threshold' at the top of the current experience-related salary scale. On passing this, teachers would enter a new upper pay range with further pay increases based on an annual performance review. Passing the Threshold would itself be based on an assessment of their professional knowledge and teaching skills, and more controversially, on pupil progress. Although performance pay has operated for head teachers since January 1991, its introduction for classroom teachers is a radical departure. As the teachers' unions point out, there has been nothing comparable for teachers since the experiments of linking pay to pupils' results were abandoned a century ago.

At the same time as pressing for substantial changes in performance outcomes, this Government also espouses social partnership as a method for promoting social and economic change. The proposed changes to teachers' pay systems therefore pose a special challenge to the teachers' unions, to redefine the way in which they represent their members' interests. Modern pay systems that seek to encourage employees to develop their skills and improve their performance pose a direct challenge to the old 'rate for the job' systems, and hence to the classical approaches to collective bargaining. At the same time, they also generate new demands for employee representation to

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<sup>1</sup> . DfEE (1998)

<sup>2</sup> 'On n'a pas de pétrole mais on a des idées'.

<sup>3</sup> Reich R. B. (1991).

ensure these new systems operate fairly. In fact, this is also to the benefit of management because our previous research shows that the employees' belief that they were operated unfairly discredited the schemes and undermined their intended incentive effects (Marsden and French, 1998). Indeed, this point has been recognised in the 'Makinson Report', a recent government review of the civil service performance management systems.<sup>4</sup>

Recognising the importance of this new approach to teachers' rewards, the Centre for Economic Performance decided to launch a 'before-and-after' study of the reforms. This paper discusses *provisional* results from the 'before' part of the study based on a questionnaire survey of teachers carried out in January and February 2000<sup>5</sup>. The new salaries are scheduled to come into operation in the autumn of 2000 after an intense period of teacher assessments for the Threshold to be carried out during the summer. We plan follow-up surveys next year and in two years' time.

This paper starts with a brief outline of the proposed new system. It then looks at some initial teacher reactions before considering its potential incentive effects for the performance of current teachers, and for attracting more good graduates into the profession, and retaining those already there. It concludes with a discussion of the new scheme's likely operation and the new opportunities it opens for union-management partnership.

## **2. Key elements of the new pay system**

In the words of the Green Paper, the key objective of the new salary and performance management system is 'to provide greater incentives and rewards for good performance and to establish routes for better career progression' (DfEE 1999a: 17). It comprises two key elements: the Threshold, and Performance Management.

The aim of the Threshold is to lift the barrier for classroom teachers' careers and rewards under the current salary system, which they normally reach after between seven and nine years in the job. It also seeks to improve the rewards for remaining in teaching as distinct from moving into management or education administration. The standards required to pass the Threshold successfully include: professional knowledge, teaching skills, wider professional effectiveness and characteristics, and the hotly debated element of 'pupil progress'. On passing the Threshold, the Government has proposed that teachers should receive an immediate salary enhancement of £2000.

The second element is Performance Management. Passing the Threshold will open up a new upper pay range extending from about £26k to about £30k, comprising four enhancements of about £1,000 based on the outcome of a Performance Review<sup>6</sup>. The

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<sup>4</sup> Makinson, (2000).

<sup>5</sup> It should be stressed that all of the statistical results in this article are provisional, using that part of the final sample ready for analysis at the time of writing. It represents about two thirds of the likely final sample, and is based on just under 3,000 replies, representing a response rate of about 40% from teachers in those schools taking part.

<sup>6</sup> There will also be additional allowances for management, recruitment and retention and special needs.

system of Performance Review will apply to all teachers, but only for those on the upper pay spine, those in the leadership group, and those on the proposed 'Fast Track' below it, will pay be linked to performance.

### 3. Teachers' views on linking pay to performance

Teachers stand apart from most other groups of public servants, but alongside doctors and nurses, in their opposition to performance pay in principle. Of the two thirds who disagreed with the principle, over half did so strongly (Table 1). This opposition was already evident in the CEP's earlier study that included head teachers<sup>7</sup>, and is visible too in the more recent opinion surveys carried out by some of the teachers' unions.<sup>8</sup> Opposition is also strong to one of the key proposals: that performance management should take some account of pupil progress. Teachers are strongly attached to the principle that their pay should reflect job demands, there is a strong feeling that all teachers deserve a pay rise, and that whatever the unfairness and inconsistencies of the old system, the proposed link between pay and performance will do little to improve fairness. On the other hand, views on the likely incentive effect of the proposed pay levels above the threshold are ambivalent at the overall level, but as will be seen later, there are important differences between younger and more senior teachers.

**Table 1. Teachers' views about performance pay**

Q. No.		Disagree %	Neutral %	Agree %
2	The principle of relating teachers' pay to performance is a good one	63	12	24
4	The principle that individual teachers' pay should take some account of pupil progress is a good one	56	17	27
3	Teachers' pay should reflect the demands of the post and not the performance of individuals	11	11	77
6	The best way to reward good teaching is to raise existing salary levels for all teachers	12	9	79
21	Linking pay with the Performance Review will result in a fairer allocation of pay	70	15	11
16	The salary levels above the Threshold are too low to make me want to work harder in order to get them	14	39	36

Note: in this, and similar tables in this article, the figures show row percentages, omitting 'don't knows'. Thus 63% disagreed with the principle of performance pay (Q2), 12% were 'neutral', and 24% 'agreed', and 1% (not shown) did not know. The question numbers shown relate to the questionnaire included in the appendix.

The Green Paper stresses the positive arguments for improving rewards and incentives, but much of the teachers' response is likely to be conditioned by what they believe are its true objectives. Here, there is general scepticism about the professed goal of raising pupil achievements, and a strong suspicion that there is a hidden agenda of minimising the cost of uprating teachers' salaries, and of getting more work out of them (Table 2). This is clear from the belief that financial constraints will impose a 'quota' so that many

<sup>7</sup> Marsden D.W, and French S. (1998).

<sup>8</sup> NASUWT (1999 a and b).

deserving teachers will not be allowed to pass the Threshold. Signs of teachers feeling the 'under siege' can be seen in the large number who believe they cannot work any harder than they do, and that they usually lose out whenever things change in education.

**Table 2. Teachers' views about the new system's likely operation**

Q no.		Disagree % *	Neutral %	Agree %
8	The Green Paper pay system is designed to raise pupil achievements	58	22	13
9	The Green Paper pay system is a device to avoid paying more money to all teachers	9	18	68
10	For all that is said about pupil attainments, the Green Paper pay system is simply a device to get more work done.	14	26	54
20	In practice, many excellent teachers will not pass the Threshold because there is certain to be a quota on places available	3	8	82
14	Whenever changes are made in education teachers usually lose out in the end	10	22	66
13	It is very hard for teachers like me to improve our performance because we already work as hard as we possibly can	6	6	88

\* Figures show row percentages.

#### **4. Discretionary working time and variations in teaching effectiveness.**

One of the key reasons behind management interest in performance pay systems lies in the belief that, in many activities, employees can exercise a good deal of discretion in their work, and that therefore better motivation will lead to better organisational performance. This argument has received a lot of attention within the New Economics of Personnel: employers need to link pay to performance when jobs involve a lot of discretion and effort is hard to monitor because employees will take the easy option if they are paid the same no matter how hard they work (eg. Lazear, 1998).

A second, and more sophisticated, reason for management interest is that performance pay may enable management to attach rewards to some discretionary activities rather than others. It can thus give a signal as to which ones it values most, and so guide work priorities. It has been shown that use of simplistic measures of performance can easily bias performance towards tasks which are more easily measured and away from equally important, but harder to measure, qualitative aspects of a person's job (eg. Holmstrom and Milgrom, 1991). It can therefore provide a key support to the process of goal-setting within organisations.

The first argument assumes that employee motivation is primarily focused on extrinsic rewards, and that other intrinsic motivators such as commitment or a belief in the inherent value of their work, are less important, or can be ignored. In contrast, the second, more sophisticated, argument is relevant whichever type of motivation is dominant. Managers may simply wish to reward certain kinds of activity with money, because this will direct the work of those who are extrinsically motivated. But equally, with employees who are committed to their organisations, or believe in the intrinsic value of their work, management may still wish to alter priorities. In the case of teachers, the question of whether teacher assessment should include an element of

pupil attainments is a good example. The main union objection has been that it is hard to measure fairly. On the other hand, one reason for the government's insistence is surely that it wishes teachers to give greater priority to such attainments, and integrating them into performance management is part of a wider exercise of setting objectives for schools and the educational system as a whole. This integration of employee performance management with wider strategic government objectives has been stressed in both of the recent reports on the reform of performance management (Bichard 1999, and Makinson, 2000).

Our study includes two areas of teachers' work in which such discretion plays an important part: their working of 'non-directed' hours; and the effectiveness with which they teach. Although we cannot measure any effects on the proposed scheme on their discretionary activities, we can probe some of the factors behind the patterns observable in the replies from teachers so far.

#### **4.1 Working time**

Teachers' working time divides into two broad categories. The first might be called 'directed hours', when they are obliged to be available to teach and undertake other duties as directed by their employer or head teacher. In addition to their directed hours, teachers are required by contract to work 'such additional hours as may be needed to enable (them) to discharge effectively (their) professional duties'. These include marking, report writing, and the preparation of lessons, teaching materials and teaching programmes. The amount of such hours are not be defined by the employer but 'shall depend upon the work needed to discharge the teacher's duties'.<sup>9</sup>

Our first survey results echo the long working hours found in earlier surveys of teachers' working time by the School Teachers' Review Body. Teachers in our sample worked a median 14.8 hours beyond 'directed time' in the week before the survey (Table 3). This compares with mean non-directed time of 12.1 hours in primary, and 13.3 hours in secondary schools found by the STRB working time survey 1996, against a background of total term-time work week of just over 50 hours (STRB 1996).<sup>10</sup> Thus, the margin within which teachers may exercise their professional discretion over work priorities is considerable: almost a third of their total weekly term-time hours.

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<sup>9</sup> . School Teachers' Pay and Conditions Document 1999 paragraph 51.7. Paragraphs 51.1 to 51.7 define teachers' working time obligations.

<sup>10</sup> Our own definition differs slightly from that used by the STRB, largely because of different survey methods. The STRB uses a diary-based approach, asking teachers to log all activities during the sample period, and consistent with this, uses the definition: 'hours worked at weekends and before school and after 6pm'. In designing the question on working time, we considered using the STRB definitions which would have facilitated comparisons between the two sets of results. However, at the pilot stage, it was decided that the simpler formula of 'directed hours' was more suitable. In particular, it was equally applicable to both primary and secondary schools whose teaching day differs in length.

The reasons they give for these extra hours are revealing, and have little to do with financial and promotion incentives. The most common reason given is that it was felt to be 'the only way to continue to give a high quality of education' to their pupils.

**Table 3 'Non-directed' hours worked by teachers and their use.**

Type of 'out-of-hours' activity (Qs 55 & 56)	% of 'non-directed' hours devoted to each activity	First reason	Second reason
Lesson preparation and marking	54	Quality of education	To get the work done
Seeing parents and pupils outside class time	10	Quality of education	Activities occur after hours & don't let down pupils & colleagues
Involvement in school clubs, sports, orchestras, etc.	5	Activities after hours	Enjoy the work
School/staff management: meetings	11	Management pressure	To benefit school
General administrative tasks	14	To get the work done	Quality of education
Individual & professional development activities	5	Quality of education	Activities occur after hours
Total	100		

These reasons mirror those given for remaining in teaching, which stress the intrinsic interest of their work over the financial and status rewards of their jobs. They also reflect the very high levels of commitment our survey found both to their schools and the teaching profession (see Section 5 below). These appear well above those of many other groups of workers in the economy.

In other words, teachers do not see themselves as cynically taking advantage of their relative job and pay security to enjoy 'on-the-job leisure'. If anything, they feel trapped into going the extra mile, or two, in order to give their pupils the quality of education they believe they deserve. Thus, if performance management is to work for teachers, its most likely channel would be to redirect teachers' discretionary activities towards pupil achievements. Depending on how these are defined and measured, it might lead to more focus on lesson preparation, or to more administration, for example.

## **4.2 Variations in teaching effectiveness**

The other dimension of teachers' work discretion is captured in their views about variations in teaching effectiveness among experienced teachers in their schools. Around 60% believe there are significant variations. So at first glance, one might think the argument for more incentives is vindicated: there is plenty of scope for them to operate by encouraging more teachers to attain a higher standard.

What do teachers mean by variation in 'teaching effectiveness'? Our survey provides two clues: first what kinds of teachers hold this view; and second, to what reasons do they attribute such variation. Belief in variations in teaching effectiveness increases



modestly with the level of qualifications held, but is not related to the class of degree obtained. This would seem to suggest the importance of initial training and qualifications rather than academic ability. Similarly, those who ranked career opportunities and promotion as an important attraction of their jobs were more likely to believe there is significant variation in teaching. Because in-service training plays an important part in such progression, it is reasonable to conclude that it is seen as contributing to greater teaching effectiveness.

Many teachers themselves cited variations in teaching skills as a factor explaining differences in teaching effectiveness. They also cited the ability to motivate their pupils (Table 4). Among those who stressed teaching skills, it seems that they meant classroom skills as much as initial qualifications. The likelihood of citing teaching skills was unrelated to either initial qualifications or class of degree. As just mentioned, those who placed a higher value on career opportunities and promotion in their jobs were also more likely to stress better teaching skills, and by implication in-service training, as a cause of greater effectiveness.

The other two reasons commonly cited for variations in teaching effectiveness were differences in motivation and morale, and having a very difficult workload. They were more likely to be cited by those who felt under pressure themselves: if they believed there was little scope to work any harder than they do whatever the carrots held out by the Threshold, and if they thought teachers usually lose out when things change.

Teachers' judgements of the causes of variations in effectiveness seem to reflect a mixture of knowledge of what goes on in their schools and their own personal situation. This is not altogether surprising. Many teachers, as became apparent during the pilot stage of the survey and from written-in comments, only rarely see their colleagues in action in the classroom. Hence, they will judge effectiveness indirectly, from its consequences on pupils and on other teachers.<sup>11</sup>

These views on the causes of differences in effectiveness cast a more subtle light on the nature of teachers' discretion in their work and on the channels through which performance incentives might operate (Table 4). The differences in teaching skills, cited by a quarter of teachers, like those cited by another quarter in the ability to motivate their pupils, could be addressed by suitable training. Hence, one way to make the Threshold more effective, by both raising standards and rewarding teachers, would be to encourage teachers and their schools to invest more in professional development. The 'difficult workloads' cited by one in seven suggests that the Threshold could lead to higher performance by encouraging some schools to address the workload issues. Finally, only one third mentioned the issue stressed most by the economic theory of incentives: differences in motivation and morale. Without closer analysis it is not possible to say how far such differences in motivation are due to lack of financial incentives or to other causes.

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<sup>11</sup>. This was also reflected in the number of 'neutral' and 'don't know' answers to these questions.

**Table 4. Causes of variations in teaching effectiveness**

Sources of variation in teaching effectiveness among experienced teachers in my school (Q 38)	% citing as main factor
Different levels of teaching skills	25
Differences in motivation or morale	32
Differences in age	1
Ability to motivate their pupils	22
some teachers have a very difficult workload	14
Other	7
Total	100

## 5. Organisational and Professional Commitment among teachers

Further support for the more sophisticated diagnosis of incentives is provided by the teachers' replies on their commitment to their schools and their profession.

Commitment has been defined as comprising three dimensions:

- Identification: a strong belief in and acceptance of the organisation's goals and values;
- Involvement: a willingness to exert considerable effort on the its behalf; and
- Loyalty: a strong desire to maintain membership (Mowday, Porter and Steers, 1982).

Employees' commitment to their employing organisation is believed to have an impact on the willingness to use the discretion they have in their jobs to their employer's advantage. Using a reduced version of the commitment scale refined by Peccei and Guest (1993), we asked teachers about their commitment to their schools and to a more limited degree, about their profession.

Classroom teachers, like the heads covered in the CEP's 1997 survey, responded very positively on commitment to their schools, especially on identification and involvement, but also on loyalty despite the financial pressures to seek alternative employment (Table 5). They compare favourably with the levels of commitment found by Peccei and Guest among British Rail employees (all occupations) in the decade before privatisation, and with civil servants and NHS hospital trust employees of our previous study (Marsden and French, 1998).

**Table 5. Commitment among teachers**

	Disagree % *	Neutral %	Agree %
<b>A Commitment to one's school</b>			
<b>Identification</b>			
42 I feel quite proud to be able to tell people that I work at my current school	10	20	70
43 I feel myself to be a part of my current school	4	7	88
<b>Involvement</b>			
44 To know that my own work had made a contribution to the good of my school would please me	0	3	97
45 In my work, I like to feel that I am making an effort not just for myself but for my school	1	6	93
<b>Loyalty</b>			
46 Even if my school were in serious financial difficulty, I would be reluctant to change to another school	18	19	60
47 The offer of a bit more money at another school would not seriously make me think of changing school	21	15	63
<b>B Commitment to the teaching profession</b>			
48 I feel myself to be a part of the teaching profession	2	6	91
49 To know that my own work had made a contribution to the good of the teaching profession would please me	1	11	88
50 The offer of a bit more money outside education would not seriously make me think of leaving the teaching profession	33	14	50

\* Figures show row percentages.

Employees who display such levels of commitment to their schools and their profession are unlikely to be effort minimisers. Paying a rate for the job whatever the person's performance will not induce the lowest level of effort consistent with avoiding dismissal. Hence the simple 'punishment-centred' view of incentives is inappropriate for teachers.

Nevertheless, the Government might still wish to use performance incentives to steer a committed group of employees towards different kinds of performance consistent with a redefinition of the goals of their schools and the educational system. If this is the objective, then it is essential that teachers should not see the new system as punishment-centred. At present, it is seen as rewarding those judged to be doing well, but by implication withholding rewards from those who are not. This feeling is captured in teachers' beliefs about a quota, that they cannot work any harder, and the general lack of fairness (Table 2 above). I shall return to this in the final section.

## 6. Recruitment and retention

Whatever the Threshold's merits or demerits as a motivator of performance, it also considerably enhances the salary prospects of successful teachers compared with the pay structure it replaces, and so could aid recruitment and retention. We know from previous research that teachers' relative salaries affect recruitment (eg. Zabalza et al., 1979, Dolton 1996). However, it is worth remembering the perverse effects of trying to improve graduate teacher recruitment in the US in the 1980s by across-the-board increases in teacher salaries. There, Ballou and Podgursky (1997) showed that the effect was to cut wastage which also reduced vacancies for new entrants. As good graduates saw less openings in teaching, they chose to invest in training for other occupations, and as a result the hoped for cohort of bright graduates never arrived. Hence the interest in concentrating resources on improving teachers' career and salary prospects.

The new teachers' pay system stands in marked contrast to the systems of performance pay for most other UK public servants, and combines performance incentives with career enhancement. By creating a new pay range above the Threshold, the system will offer enhanced careers to graduates who make the grade, and break the ceiling at Point 9 which the old pay system imposed on teacher salary progression. Previously teachers could only progress beyond that point by undertaking management or other special duties which attracted additional allowances.<sup>12</sup> In 1998, over 60% of all teachers were clustered between Point 9 and Point 12 on their salary scale.<sup>13</sup> How the system will work for teachers currently below Point 9 is simple and clear. For those above Point 9, despite government assurances that no one who passes the Threshold will be worse off as a result, the theoretical simplicity of the model becomes blurred in the complex arrangements for transition between the old and the new system. The government proposes to replace the existing system of responsibility points with a new system of management allowances, but also to discourage the practice of boosting pay by peppering additional full and half-points for miscellaneous extra responsibilities (STRB, 2000).

To tackle these questions, we divided the sample of teachers into three groups: those on the Point 9, and on the Threshold, and those below and those above that point. About a quarter of the sample were below Point 9, a bit less than that on Point 9, and just over half, above it. What emerges is that those below Point 9 are more likely to see the pay levels above the Threshold as an incentive both to work harder, and to remain in teaching than those on Point 9 and above it (Table 6). As mentioned earlier, the new incentives are much more transparent for those currently below the point at which the Threshold will come into operation.

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<sup>12</sup>. Under the old system, teachers could earn up to nine 'experience points', five 'responsibility points', three 'excellence points' (that were rarely if ever used), two or three 'recruitment and retention points', and one 'special educational needs' point. However, the majority of teachers stopped earning any more at Point 9. In 1998, about a quarter of teachers were on Point 9, 30% earned below Point 9, and 90% were on Point 12 or below.

<sup>13</sup> Source: STRB, Teachers' Pay Survey 1998; national estimates of classroom teachers in schools, (STRB 1999).

**Table 6. Incentives above and below the Threshold**

<b>Salary levels above the Threshold:</b>	<b>Disagree % *</b>	<b>Neutral %</b>	<b>Agree %</b>
<b>too low to make we want to work harder (Q16: critcash)</b>			
Below Point 9	20	48	32
On Point 9	17	42	41
Above Point 9	14	43	43
<b>make it more financially attractive to remain a teacher (Q18: meremain)</b>			
Below Point 9	45	24	31
On Point 9	56	22	22
Above Point 9	56	21	22

\* Row percentages.

Q 16: N > 2,100; Q 18: N = 2,300.

A natural question might be to ask whether the greater proportion of primary school and women teachers below Point 9 might explain these different responses. In fact, the same relationship holds both within primary and secondary schools, and among women and men teachers.

The implications for improved recruitment and retention can be seen in the perceived opportunities for job mobility among teachers (Table 7). Teachers below Point 9 are much more optimistic about their ability to change career than are those above it (50% against 18%). They are also more likely to say they would consider changing schools for a pay rise. On the other hand, they are as keen to remain in teaching as their elders and are no more likely to change career for the sake of a bit more money: about half would not, and about one third would consider leaving teaching.

These views are expressions of willingness to leave teaching and to change school and may never translate into actual job changes. However, it seems clear that one beneficial effect of the Threshold will be to make teaching more attractive to those who can most easily find a job outside. Because younger teachers below Point 9 will have been less socialised into teaching than their older colleagues, and will be closer to the circle of friends from their college days engaged in other careers, they may to some extent speak for graduates outside teaching. If younger teachers find the enhanced career rewards attractive, then so might other graduates considering a career in teaching.

**Table 7. Retention above and below the Threshold**

<b>Pay and change of career or school</b>	<b>Disagree % *</b>	<b>Neutral %</b>	<b>Agree %</b>
<b>Changing career now would be difficult (Q52)</b>			
Below	50	16	34
Point 9	22	14	64
Above	18	13	69
<b>Would not leave teaching for the offer of a bit more money (Q50)</b>			
Below	34	16	50
Point 9	38	13	49
Above	33	13	54
<b>Would not change school for the offer of a bit more money (Q47)</b>			
Below	27	19	54
Point 9	18	13	68
Above	21	14	66

\* Row percentages.

In some other key respects, younger teachers below Point 9 have very similar attitudes to performance management to those of their more senior colleagues (Table 8). They are just as likely to oppose the principle of linking pay to performance, to believe it will cause jealousies in the workplace, and to believe that a quota will operate. This heightens the contrast between the two paths by which the new system could raise the quality of school performance: by incentives for the performance of those currently in teaching, and by attracting new graduates into the profession.

**Table 8. Attitudes to PRP above and below the Threshold**

<b>Beliefs about performance pay:</b>	<b>Disagree % *</b>	<b>Neutral %</b>	<b>Agree %</b>
<b>A good principle (Q2: ppgdprin)</b>			
Below	62	11	27
Point 9	66	11	22
Above	62	12	26
<b>will cause jealousies (Q17: ppjelus)</b>			
Below	4	8	87
Point 9	4	6	90
Above	4	7	89
<b>there will be a quota (Q20: ppquota)</b>			
Below	2	10	88
Point 9	2	7	91
Above	3	9	88

\* Row percentages.

## **7. Fairness of operation and union-management 'partnership'**

If it is to succeed, the Threshold and Performance Management system must be seen to operate fairly. The CEP's earlier research on performance pay has highlighted just how far perceptions of unfair operation can blight incentive schemes, causing them to demotivate rather than to motivate staff. This opens up one of the most important challenges for the Government's and the TUC's belief in social partnership. Our survey provides several examples of where this might be achieved, and where partnership

between the employers, school management and the teachers' unions can help reduce the risk of the scheme going badly wrong and de-motivating teachers

The fear of unfair operation mentioned earlier doubtless explains why over 80% of our respondents saw the need for an appeals procedure. As a general rule, appeals procedures need a strong measure of independence if they are to be seen to be fair. Beyond this, the unions can also help get the balance right on the measures to help teachers achieve Threshold performance standards.

Earlier in this paper, it was argued that a 'punishment-centred' ethos for performance management would be inappropriate given the high levels of commitment evident among teachers. An alternative model, suggested by one union official, is that of the 'driving test'. Indeed, there is something of this line of thinking in the government's approach: appeals will not be allowed, but teachers will be free to apply for the Threshold many times. A critical factor will be the degree support schools can give to help teachers to pass the Threshold by mentoring and by professional development. The Government has recognised the need to support the new system with better training and support (DfEE 1999b), but as always, this has to be met out of a limited budget. Thus, a key role for the teachers' unions will be to keep up pressure on the government, and school management to ensure that these commitments are met. Otherwise, there is a danger that the 'punishment-centred' ethos will displace that of the 'driving test'.

Finally, union pressure may help to avoid the injustices that could arise from uncertainty about future government funding of the pay increases for those passing the Threshold. The Government has pledged that salary increases arising from teachers passing the Threshold successfully will be funded for the first two years, and has assured that it has budgeted for its medium-term costs. But there is always a risk that governments will be 'blown off course'. Should financial constraints make it harder to pass the Threshold in the future there is a clear danger of inequity between 'first' and 'second generation' applicants. It is just such feelings of unfair operation that emerged in the CEP's previous research as undermining the legitimacy of performance management in the eyes of public servants<sup>14</sup>.

Are the unions the right groups to do this? A telling piece of evidence from our provisional results shows how far teachers trust their unions to represent their interests faithfully in this area. Two thirds replied they felt they shared the same interests with other teachers in their unions, and sixty percent felt their unions themselves shared their interests (Table 9). Indeed, half of the teachers feel the leadership team in their school shares their interests on the Green Paper. Of the remainder, most found it 'hard to say'. In contrast, most teachers either thought the DfEE's interests were different, or found it hard to say how close their interests were.

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<sup>14</sup>. See also Marsden and Richardson (1994).

**Table 9. Who shares the same interests as teachers over performance management?**

When considering the implementation of PM, which groups do you feel share broadly the same interests as yourself?	Broadly the same % *	Mostly different %	It's hard to say %
a) Your school's governors	24	16	60
b) The leadership group/management team in your school	49	19	32
c) Other teachers in your school	79	5	16
d) Other teachers in your union or professional association	65	5	30
e) Your union or professional association	61	7	32
f) The DfEE or your LEA	9	36	54

\* Row percentages

Our previous research shows how important it is that performance management should be seen to operate fairly. The DfEE might well be as capable as the other parties of administering the procedures fairly, but what counts are teachers' perceptions. On our evidence so far, if the teachers' unions were to judge the scheme to be fairly operated, teachers would be far more likely to believe them than the DfEE or other government bodies, and they would therefore be far less likely to find the scheme de-motivating. The stakes are high. On the success of these management reforms, hangs the success of the Government's ambition for a world-class education service.



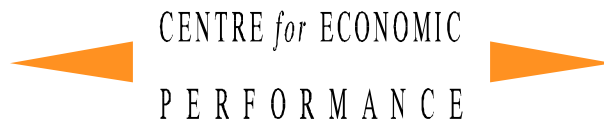
## **8. Appendix 1. Sample design, covering letter, and questionnaire**

The questionnaire was developed in close consultation with the teachers' unions and the Department for Education and Employment, and piloted on groups of lay representatives.

A random sample of 1,675 schools was drawn from the Register of Educational Establishments for England and a similar register for Wales, and packages of questionnaires were sent to head teachers. Heads received a covering letter explaining the nature of the study, that it had the support of the head teachers' associations, and that it had been developed in consultation with the teachers' unions and the DfEE. They were asked to distribute the questionnaires. In small schools with under 35 teachers, every teacher was sent a questionnaire, and in larger ones, heads were asked to select every  $n^{\text{th}}$  teacher off the school's staff list depending on the size of the school. Heads were asked to complete a special questionnaire.

The results in this paper relate to the first part of the sample: 1000 schools in England mailed in January 2000, and analyse the replies of just under 3000 classroom teachers only. The estimated response rate is around 40% for classroom teachers from the schools taking part, and about 30% for head teachers, representing about one third of schools sampled taking part. There are four special reasons for this. First, many schools actually telephoned or wrote back to say their current workload did not permit them to complete yet another survey. Secondly, the panel nature of the study meant that teachers who were retiring did not reply, again several rang up to explain this, and involvement in the panel itself considerably increases the response burden compared with one-off questionnaire surveys. Thirdly, the distribution method meant we faced two levels of non-response: from head teachers who did not distribute the questionnaires, and from teachers who received them but did not respond. Finally, we experienced a number of technical difficulties with the mailing which meant that several schools did not receive the covering letter with the questionnaires. Preliminary checks on the answers so far seem consistent with data from other sources.

The results are provisional pending preparation of the data set based on the full response which is expected to be ready during April 2000. They are also unweighted, and so may disproportionately reflect the views of secondary school teachers.



January 2000

Dear Teacher,

**LSE study of the Green Paper pay system for teachers**

The introduction of Performance Management is intended to promote high standards in teaching and to ensure the skills and dedication of teachers are recognised and rewarded. The London School of Economics is carrying out independent research in order to find out how well the scheme is working and to discover its effects.

I am sending this questionnaire to a sample of teachers across the country. I hope very much that you will find the questions relevant and interesting. The study has been developed in consultation with all six teachers' unions and its contents discussed with the DfEE. Once I have received the replies and analysed the questionnaires, I shall write a short report which I shall make available for you to read on the LSE's web page (<http://www.lse.ac.uk/depts/industrial/teachers-study/>).

This study is specially designed to compare the views and experiences of the same teachers **before and after** the introduction of the Green Paper pay system in order to get the best possible measure of its effects. To do this, I shall need to know your name and school address so that I may send you a further questionnaire both next year and in two year's time. Such information will be treated with the strictest confidence. Your replies will be seen only by those directly connected with the project at the LSE, and no one, on either the management or the union side, will see them at any time.

The study forms part of the LSE's research programme on pay and performance, and is funded by the Economic and Social Research Council.

I hope that you will wish to complete this questionnaire and return it in its envelope using the enclosed FREEPOST slip to me at the LSE, by **January 31<sup>st</sup>**. Thank you very much for your time.

David Marsden  
Professor of Industrial Relations.

## LSE Study of Performance Management for Teachers

**I should like to start by asking you some questions about the aspects of your work in teaching which appeal to you.**

**1 At the moment, which four aspects of your job most make you feel it is worthwhile to remain a teacher?** *(Please rank the four most important for you, highest rank = 1)*

a) Job security and pension	
b) Opportunities to exercise responsibility	
c) Pay	
d) Varied and interesting work	
e) Career opportunities and promotion	
f) Satisfaction from the achievements of your pupils	
g) Working time and holiday schedules (e.g. ability to combine with childcare)	
h) Contributing to an important public service	
i) Working as part of a team	

**I should now like to ask you some questions about the general principle of linking pay to performance. Please indicate whether you agree or disagree with the statements below by circling the number closest to your point of view.**

	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
2 The principle of relating teachers' pay to performance is a good one	1	2	3	4	5	0
3 Teachers' pay should reflect the demands of the post and not the performance of individuals	1	2	3	4	5	0
4 The principle that individual teachers' pay should take some account of pupil progress is a good one	1	2	3	4	5	0
5 Teachers should be paid more when posts in their subjects are difficult to recruit	1	2	3	4	5	0
6 The best way to reward good teaching is to raise existing salary levels for all teachers	1	2	3	4	5	0
7 Individual performance should be the sole criterion for any movement up the teachers' pay spine	1	2	3	4	5	0
8 The Green Paper pay system is designed to raise pupil achievements	1	2	3	4	5	0
9 The Green Paper pay system is a device to avoid paying more money to all teachers	1	2	3	4	5	0
10 For all that is said about pupil attainments, the Green Paper pay system is simply a device to get more work done.	1	2	3	4	5	0
11 Linking pay with performance will give me more incentive to work beyond the requirements of my job	1	2	3	4	5	0
12 It is better to reward the achievements of the whole school than the performance of individual teachers	1	2	3	4	5	0
13 It is very hard for teachers like me to improve our performance because we already work as hard as we possibly can	1	2	3	4	5	0
14 Whenever changes are made in education teachers usually lose out in the end	1	2	3	4	5	0

## I should now like to ask you about different elements of the Green Paper pay system.

The new system of Performance Management for teachers comprises five main elements:

- An annual Performance Review for all teachers;
- A Threshold of teaching attainment above which teachers are placed on a new 'upper pay spine';
- A link between Performance Review (or appraisal) and Pay Review for teachers on the new upper pay spine

above

the Threshold, and for accelerated increments below the Threshold;

- A 'Fast-Track' for 'high flying' and newly qualified teachers
- A School Performance Award given for the achievements of the school as a whole.

### The Threshold

	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
15 The Threshold will mean that good teaching is rewarded at last	1	2	3	4	5	0
16 The salary levels above the Threshold are too low to make me want to work harder in order to get them	1	2	3	4	5	0
17 Jealousies will arise between the teachers who pass the Threshold and those who don't	1	2	3	4	5	0
18 The higher pay levels above the Threshold will make it more attractive for me to remain a teacher	1	2	3	4	5	0
19 Introducing the Threshold will have no effect on the quality of my performance because my work is already at the appropriate standard	1	2	3	4	5	0
20 In practice, many excellent teachers will not pass the Threshold because there is certain to be a quota on places available	1	2	3	4	5	0

### Linking pay with the Performance Review

21 Linking pay with the Performance Review will result in a fairer allocation of pay	1	2	3	4	5	0
22 The link will undermine my confidence in the Review	1	2	3	4	5	0
23 The link will make me take the Review more seriously	1	2	3	4	5	0
24 The link is problematic because it is hard to relate the work done in schools to individual performance	1	2	3	4	5	0
25 Managers will use Performance Review to reward their favourites	1	2	3	4	5	0
26 An appeals procedure will be needed to ensure the Performance Review is operated fairly	1	2	3	4	5	0

### The School Performance Award

27 The opportunity to gain the Award will encourage team working in my school	1	2	3	4	5	0
28 It would be unfair to distribute the award equally between all the teachers in a school because some never do more than the basic requirements of their jobs	1	2	3	4	5	0
29 It would be better to spend the award on more facilities for the school than distribute it as a bonus	1	2	3	4	5	0

I should now like to ask you about whether you are eligible apply for the Threshold, and if you intend to do so.				
(Please circle the appropriate answer)		Yes	No	Don't know
30	Are you eligible, or will you be eligible in the next 2 years, to apply for the Threshold?	1	2	3
31	Do you intend to apply for the 'Threshold' within the next two years?	1	2	3
32	Have you personally discussed the new system with management in your school?	1	2	3

If you are eligible for the Threshold, but do not intend to apply, could you please explain why?				
(Please circle the appropriate answer)		Yes	No	Don't know
33	I need to know more about it	1	2	3
34	On balance, if I pass the Threshold, I believe I would be worse off:	(Please circle the appropriate answer)		
	• Financially	1		
	• In my work load and working conditions	2		
	• It would damage relations with my colleagues	3		
	• I do not believe I would be worse off	4		
	• Other reason (please specify):	5		

<b>Could you please tell me your views about performance among teachers, and the impact you and your colleagues can have on your pupils' learning.</b>						
	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
35 Teachers who do their jobs well make a real difference to their pupils' learning	1	2	3	4	5	0
36 My performance is always well above that of other teachers in my school	1	2	3	4	5	0
37 There is significant variation in teaching effectiveness among experienced teachers in my school	1	2	3	4	5	0
38 If you believe there is such variation in teaching effectiveness, could you please say what you think is the most important cause:	<i>(Please circle one only)</i>					
⇒ different levels of teaching skills	1					
⇒ differences in motivation or morale	2					
⇒ differences in age	3					
⇒ ability to motivate their pupils	4					
⇒ some teachers have a very difficult workload	5					
⇒ other, please specify:	6					

	Yes	No
39 In the last 3 years, have you tried any new ideas that have helped you teach better? (excluding national initiatives such as literacy and numeracy hours)	1	2

40 If yes, was this something you undertook:	Please circle
a) Yourself, at your own initiative?	1
b) As a group initiative with a small number of your fellow colleagues?	2
c) As the result of a management proposal or decision?	3
d) None of the above	4

41 If your answer was yes to either (a) or (b), would you like to give an example?
Example:

<b>I should now like to ask you about your general feelings towards and views about the school in which you work, about teaching, and the teaching profession, and about the quality of work relations.</b>						
	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
42 I feel quite proud to be able to tell people that I work at my current school	1	2	3	4	5	0
43 I feel myself to be a part of my current school	1	2	3	4	5	0
44 To know that my own work had made a contribution to the good of my school would please me	1	2	3	4	5	0
45 In my work, I like to feel that I am making an effort not just for myself but for my school	1	2	3	4	5	0
46 Even if my school were in serious financial difficulty, I would be reluctant to change to another school	1	2	3	4	5	0
47 The offer of a bit more money at another school would not seriously make me think of changing school	1	2	3	4	5	0
48 I feel myself to be a part of the teaching profession	1	2	3	4	5	0
49 To know that my own work had made a contribution to the good of the teaching profession would please me	1	2	3	4	5	0
50 The offer of a bit more money outside education would not seriously make me think of leaving the teaching profession	1	2	3	4	5	0
51 I can always get a similar job in another school if I want to	1	2	3	4	5	0
52 Changing career now would be difficult for me to do	1	2	3	4	5	0

### **Work hours and activities outside directed hours (formal school hours).**

I should like to ask you some questions about the number of hours you work in term time <b>outside directed hours</b> in the evenings, before the school day, and at weekends.
--

53 Last week, approximately how many hours did you spend working outside directed hours in the evenings, before the school day, and at the weekend?	<i>No. of hours.</i>
54 If this was NOT a typical term-time week, did you work:	
a) more hours than usual?	1
b) less hours than usual?..	2

55 During the <b>last two weeks</b> , roughly how many <b>hours per week</b> have you spent on each of the following activities outside directed hours in the evenings, before the school day, and at weekends?		
	<i>Please give the number of hours to the nearest half hour</i>	<b>Most important reason</b> (See Q 56 below: please enter the appropriate number in the column below)
a) Lesson preparation and marking (including report writing, pupil records, displaying pupils' work etc.)		
b) Seeing parents and pupils outside class time (e.g. for additional help with work, guidance)		
c) Involvement in school clubs, sports, orchestras, etc.		
d) School/staff management: meetings, management activities etc. (including appraising staff and PM)		
e) General administrative tasks (e.g. organising resources, general record keeping, photocopying)		
f) Individual & professional development activities (e.g. professional reading, courses, conferences, and being trained or being appraised)		

56 **Most important reason for undertaking the above activities outside directed hours.** Below are some common reasons why teachers work such hours. Please would you indicate the most important reason in the right hand column of Question 55 above, giving its number 1- 9.

- 1) I felt it necessary because I wanted to get the work done
- 2) I felt under pressure to do so from management
- 3) I felt it necessary because it is the only way to continue to give a high quality of education to my pupils
- 4) I have taken on extra responsibilities because I need the money
- 5) I really quite enjoy the work
- 6) I do it for the benefit of my school
- 7) I don't want to let my colleagues or my pupils down
- 8) The activities concerned are only available outside formal school hours
- 9) Some other reason (*please specify*).....

Which groups do you identify as sharing the same interests as you in connection with Performance Management?				
57	When considering the implementation of PM, which groups do you feel share broadly the same interests as yourself? ( <i>Please circle</i> )	<i>Broadly the same</i>	<i>Mostly different</i>	<i>It's hard to say</i>
	a) Your school's governors	1	2	0
	b) The leadership group/management team in your school	1	2	0
	c) Other teachers in your school	1	2	0
	d) Other teachers in your union or professional association	1	2	0
	e) Your union or professional association	1	2	0
	f) The DfEE or your LEA	1	2	0

<b>Who should determine standards of teaching excellence?</b>
---

58 Who do you think should have most say in determining standards of excellence in teaching? *(Please select the top two)* *Please circle*

a) The government and its agencies (eg. DfEE, Ofsted, QCA)	1
b) Practising teachers as a whole (the teaching profession)	2
c) Practising teachers in one's own discipline	3
d) The management team in individual schools	4
e) The school's governors	5
f) Parents	6
g) Local and national employers	7
h) Other (please specify)	8

<b>I should now like to ask you about your relations with your school's management. Please indicate whether you disagree or agree with the following statements.</b>
--

<i>(Please circle the appropriate answer)</i>	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
59 On the whole, I feel fairly treated by my school	1	2	3	4	5	0
60 In general, I can trust my school's management to keep its promises or commitments to me	1	2	3	4	5	0
61 My school is doing as much as it can to help me improve my pupils' attainment	1	2	3	4	5	0
62 When I, or other teachers like me, make suggestions about improving teaching in our school we are taken seriously	1	2	3	4	5	0
63 I have confidence and trust in my fellow teachers in the school	1	2	3	4	5	0

<b>I should now like to ask you about your activities related to your work in your school.</b>
--

<i>(Please circle the appropriate answer)</i>	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
64 I go out of my way to defend my school if I hear people outside criticise it	1	2	3	4	5	0
65 I make a special effort to meet all the deadlines set by my school	1	2	3	4	5	0
66 I only attend work-related meetings if required to do so by management	1	2	3	4	5	0
67 I frequently make creative suggestions to my colleagues	1	2	3	4	5	0
68 I always keep myself well-informed and undertake training when I think this may benefit the school	1	2	3	4	5	0

<b>I should now like to ask about aspects of teachers' morale in your school.</b>
---

<i>(Please circle the appropriate answer)</i>	Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
69 Teachers working here feel optimistic about the future of the school	1	2	3	4	5	0
70 My colleagues have a clear understanding of our school's aims/goals/objectives	1	2	3	4	5	0



<i>(Please circle the appropriate answer)</i>		Disagree strongly	Disagree	Neutral	Agree	Agree strongly	Don't know
71	Teachers in this school can rely on each other to do their jobs well	1	2	3	4	5	0
72	I find myself enthusiastic because of the leadership of those in management positions in the school	1	2	3	4	5	0
73	The teachers I work with are concerned about their pupils	1	2	3	4	5	0
74	My line manager is good at handling people	1	2	3	4	5	0
75	We are kept informed about what is going on in the school	1	2	3	4	5	0

**Finally, I should like some personal information. I stress again that is it will be treated as strictly confidential.**

*Please circle*

76	Are you female or male?	Female Male	1 2
77	Do you work full-time or part-time?	Full-time Part-time	1 2
78	What is your age?	years	
79	How long have you been a teacher in your current school?	years	
80	Have you had either an appraisal or a performance review in the last 2 years?	Yes No	1 2
81	Are you a member of the leadership group in your school?	Yes No	1 2
82	On which of the teachers' pay spines are you currently paid?	Deputy Head Qualified Teacher Advanced Skills Teacher Unqualified Teacher	1 2 3 4
83	What is your current annual salary or your point on your pay spine?		
84	How many responsibility points do you have?		
85	If you have a partner, is she or he in paid employment?	Yes No	1 2
86	How many dependent children or relatives does your income support?		
87	Are you any of the following?	Newly Qualified Teacher Re-entrant Special needs Supply Temporary	1 2 3 4 5
88	What is your highest qualification?	Cert. Ed./ T. Cert. BA/ BSc/ BEd. PGCE/Dip Ed. MA/MSc/MBA/MEd/NPQH PhD	1 2 3 4 5
89	If you hold an honours degree, please give its class: (1 <sup>st</sup> , 2.1 etc.)		
90	If you are a secondary school teacher, what is the main subject that you teach?	Mathematics Science Foreign Languages English PE Other	1 2 3 4 5 6
91	Do you consider yourself a member of an ethnic minority?	Yes No	1 2
92	Are you a member of one of the teachers' unions?	Yes No	1 2

Please would you give me your name, and the address of your school. I shall need this information so that I may contact you for our follow-up survey next year, and so that I may add some information about the nature of your school.

93	Your name:
----	------------

94	The name and address of your school*
	Post code

Finally, I propose to carry out a small number of telephone interviews with respondents later in the term. If you are willing to be interviewed, would you please give your telephone number and a time at which it is usually convenient to call you?

95	<p>Telephone number</p> <p>Convenient time to call</p>
----	--

*When you have completed this questionnaire, please would you return it by JANUARY 31<sup>st</sup> in its envelope using the enclosed FREEPOST address slip to me, Professor David Marsden, London School of Economics, Houghton Street, London WC2A 2AE.*

24

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