

**SCHOOL DEVELOPMENT PLANNING:
POLICY AND ADVICE TO SCHOOLS**

1. **Introduction**

Development planning forms an integral part of the work of nearly every school in Scotland. Over a number of years the EIS has issued advice, in part to address development planning as a new development in the work of schools, and also to identify ways whereby the development planning process could be used as a means of limiting teacher workload in schools. A number of recent events mean that the EIS must now update its own thinking as regards the process of school development planning.

- 1.1 The Standards in Scotland's Schools Act 2000 put in place a three level planning structure – (a) at the level of the Scottish Parliament/Executive charged with developing National Priorities, (b) at a local council level, obliged now to make an annual statement of improvement objectives, (c) and at school level where school development plans are now written into legislation. This three level structure was broadly welcomed at the time by the EIS as a better planned process overall. The new structure implies a less “top down” approach than in the recent past – when changes were imposed on schools, often without any real co-ordination. The inevitable result of this approach was the increase in teacher workload burdens.
- 1.2 There is an expectation that schools make use of the Performance Indicators in the document “How Good is Our School?” and also in “A Route to Equality and Fairness”.
- 1.3 Discussions, national and local, subsequent to the McCrone agreement of January 2001 have acknowledged that school development plans are central to the process of managing teachers' working time.
- 1.4 The legal requirement that schools involve students/pupils in the planning process has had an implication for the process itself.
- 1.5 The process underway of developing performance indicators in relation to the five National Priorities identified by the Scottish Executive will also have significant implications for the way in which the planning process in schools is undertaken.
- 1.6 All these developments, taken together with an evolution in practice as regards school development planning in nearly every school, mean that, in addition to updating policy, the EIS must now issue advice to schools which is relevant to present realities. This policy paper and advice, therefore, replace all existing policy and advice issued by the EIS.

2. **Current Practice in Relation to School Development Planning**

Practice in relation to School Development Planning has developed in different ways within different schools. In some schools there are workload committees set up following negotiations between the EIS and the then existing local authorities in the mid-1990s. Some schools have set up school planning consultative groups either of their own volition, or following EIS advice issued in the late 1990s. In many schools and in particular large secondary schools, the process of development planning is in part devolved within the school, eg to secondary subject departments. Many schools also have put in place particular arrangements to suit their own needs and in many cases practices which have been developed will be deemed satisfactory to the need of the school as well as meeting Scottish Executive expectations. In short, it is recognised that there should no longer be any national template for school development planning within schools. Schools and communities have differing needs and management and planning mechanisms do not require to be identical. Statements by the Minister of Education on the need for flexible arrangements within schools in part acknowledges this reality. The EIS believes, however, that a number of principles should inform the planning process for all schools. The context of the McCrone agreement means that now is a good time for all schools to determine whether the planning process works as effectively as it might in bringing benefits to the educational process in the school and in particular whether the associated consultative process ensures that the views and priorities of teaching staff are properly reflected in the contents of the final approved Plan.

3. **School Development Plans : General Principles**

School development plans are central to the way in which the school operates and therefore should be informed by a number of agreed principles.

- 3.1 The Plans must be realistic and achievable both in terms of the timeframes for its contents to come on stream and the time resource made available for Plan-related work to be undertaken in the course of the teachers' contractual working day, week and year.
- 3.2 The Plans should have regard to the five priorities set (after consultation) by the Scottish Executive, and to the local authority service plan, but schools should not view these in a prescriptive or limiting way. Schools should also have regard to forthcoming performance indicators in relation to the five priorities, but again not in a way that restricts the scope of the school's discussions concerning its own priorities.
- 3.3 School development plans are an important factor towards addressing issues of teacher workload, in particular through the management of teachers' working time. They are, however, not the only factor (see paragraph 6 below).

- 3.4 The plans should set priorities for the work of the school but should contain fewer priorities than schools have often been required (or felt obliged) to set in the recent past themselves.
- 3.5 In larger schools the development plan could involve a certain amount of devolution of decision-making and implementation, for example, in secondary schools, subject departments should have a direct input to the process of formulating the draft Plan and a direct role in implementing specific elements within the approved Plan.
- 3.6 To be effective, the planning process in schools should embrace all aspects of the work of the school, including new developments and initiatives, ongoing maintenance and consolidation of work, resource and financial management, workload issues and staff support. Some schools have found that the establishment of a School Planning Consultative Group (dealing with School Development Planning, the School's Devolved Budget and Workload management) is the most effective approach to use. The EIS considers that EIS School Representatives have a valuable contribution to make to such Consultative Groups or similar arrangements, either directly in that capacity, or indirectly following election to the Consultative Group by colleagues.

4. **School Development Planning : The Process of Formulating the Plan**

Some schools may wish to set up a group or a committee to oversee the school development planning process. It is important that, where this is the case, trade union representatives as well as elected representatives of all the staff should serve on the committee in addition to any appointed members of the senior management team and any other appointed promoted post holder. Where schools decide to set up a group or committee, it is important that representatives of all staff are involved in the process.

- 4.1 The planning process should itself be the basis of both prior and continuing consultation with all teaching staff. The process chosen should be genuinely collegiate, in which the involvement of all staff is encouraged throughout and where all staff may have a sense of ownership of the Plan eventually approved.
- 4.2 The planning process itself should be planned in advance to ensure that identified collegiate time is made available for all staff to have an appropriate input at an appropriate time to the planning process.
- 4.3 All aspects of work and decision-making within the schools should be clearly related to the planning process, eg curriculum development, staff development, staff review and devolved school management. The prospect of the devolved budgets of schools being determined on a 3-year rolling basis is likely to have implications for the School Planning process, for example by allowing earlier determination of the resources

which are capable of being directed towards the contents of the following session's School Plan.

- 4.4 Workload management should form an integral part of discussions as part of the planning process to ensure that the individual and collective work of teachers is capable of being undertaken within the 35 hour working week.
- 4.5 The School Development Plan – including rigorous costings of resource requirements (e.g. time, materials, staff development, and finance) and the clearly-identified resources to be provided for this purpose – should be made available to all staff prior to approval of the Plan. The draft Plan should include all the elements being proposed (e.g. departmental and cross-curricular inputs, staff committees), and the timeframe for overtaking the whole process should ensure approval well before the starting date for the Plan's implementation.

5. **The School Development Plan : Implementation**

The involvement of all staff in the school (whether or not there is a consultative group or workload committee overseeing the implementation of the plan) should be just as integral to the process of implementation of the plan as to its development. The implementation process should involve staff in a number of ways and at a number of stages.

- 5.1 There should be continuing consultation about the human, material and financial resources and support needed in order to take forward the implementation of the plan.
- 5.2 Regular information should be given and discussion should take place about progress of the plan throughout the year.
- 5.3 Staff in the school have the right to be fully involved in any discussion about any need for significant revisions to the plan (together with their practical, resource and workload implications) in the course of the year such changes should not be a common occurrence. Any individual member of staff should be encouraged to put forward his or her own proposals about revisions to the plan where he or she feels that this is necessary in the light of any issues arising in the course of implementation.
- 5.4 All staff should receive regular information about the school's progress in implementing the plan, including the financial (including staffing) implications of the implementation of the plan.
- 5.5 Workload issues, whether emanating from the plan or from any other source, should be discussed regularly and frequently, involving all staff. There must also be opportunity for direct Trade Union input into discussions on all issues relating to workload.

6. **The School Development Plan and Teacher Workload**

The School Development Plan is one method which offers teachers a protection against unacceptable increases in workload and School Development Planning is already the basis of some local Workload Agreements with education authorities. It offers some control over the pace of change within schools as well as the potential for staff within the school to ensure that the Plan can be implemented within the framework set by the McCrone agreement for a working day, week and year. However, the School Development Plan cannot in itself resolve all issues of workload. Teachers must have regard to the protections afforded in terms of their own contracts, and in particular the McCrone agreement. Teachers at all levels of the school must also have regard to the current climate where there is real encouragement to develop collegiality and to enhance teacher empowerment and professionalism throughout the education process. National, local authority and establishment-level McCrone frameworks allow the possibility for genuine collective bargaining to take place on issues regarding teachers' time and workload. Taken together, there is the potential to raise levels of professionalism, while at the same time managing working time and controlling workload burdens.

7. **Advice to Schools**

The current session 2001-2002, set against recent developments set out in paragraph 1, affords a good opportunity to review whether the development and implementation of the School Development Plan in each school are as effective as they might be. EIS members in schools should meet to discuss whether the broad principles set out in this paper are being adhered to both in terms of the nature of the School Development Plan itself, the preparation of the Plan and its implementation. The purpose of the EIS nationally is not to set a template for the way in which the school development planning process should operate, but rather to propose a framework within which the planning process can operate successfully. The key element to this success is the collegiate working of all staff within the school. This is integral to the implementation of the McCrone agreement and to the planning process which indeed lies at the heart of that agreement. Where difficulties arise in a particular school, these should be discussed at the school EIS meeting, in the first instance. The EIS Representative should convey the views of members to school management with the aim of resolving any issues in line with EIS policy. The results of these negotiations should be reported back to the school EIS membership and a decision taken on whether this should be referred by the EIS School Representative to the local association secretary. The local association secretary will take this forward at authority level, if appropriate, and should look for support from the EIS Area Officer where required. The EIS nationally will monitor the effectiveness of arrangements in particular through contact with local association secretaries. It is, therefore, important that individual EIS School Representatives should discuss with secretaries not only difficulties which have arisen within the school but also examples of good practice.

CHECK LIST

School Development Plans : General Principles

- The Plans must be realistic and achievable (3.1)
- The Plans should have regard to the five priorities set by the Scottish Executive (3.2)
- School development plans are an important factor towards addressing issues of teacher workload (3.3)
- The plans should contain fewer priorities than schools have often been required to set in the recent past (3.4)
- In larger schools the development plan could involve a certain amount of devolution of decision-making and implementation (3.5)
- The planning process in schools should embrace all aspects of the work of the school, including new developments and initiatives (3.6).

School Development Planning: The Process of Formulating the Plan

- Some schools may wish to set up a group or a committee to oversee the development planning process (4.)
- The planning process should itself be the basis of both prior and continuing consultation with all teaching staff (4.1)
- The planning process itself should be planned in advance to allow enough time for staff to have appropriate input to the process (4.2)
- All aspects of work and decision-making within schools should be clearly related to the planning process (4.3)
- Workload management should form an integral part of discussions (4.4)
- Rigorous costings of resource requirements should be made available to all staff (4.5).

The School Development Plan : Implementation

- There should be continuing consultation to take forward implementation of the plan (5.1)
- Regular information should be given about progress of the plan (5.2)
- Staff in the school have the right to be fully involved in any discussion about any need for significant revisions to the plan (5.3)

- All staff should receive regular information about the school's progress in implementing the plan (5.4)
- Workload issues should be discussed regularly and frequently (5.5).

The School Development Plan and Teacher Workload

- Teachers must have regard to the protections afforded in terms of their own contracts, and in particular the McCrone agreement (6.)
- Where difficulties arise in a particular school, these should be discussed at the school EIS meeting, in the first instance (7.).