

Pembrokeshire County Council
Cyngor Sir Penfro

Inclusion Service
Gwasanaeth Cynhwysiant

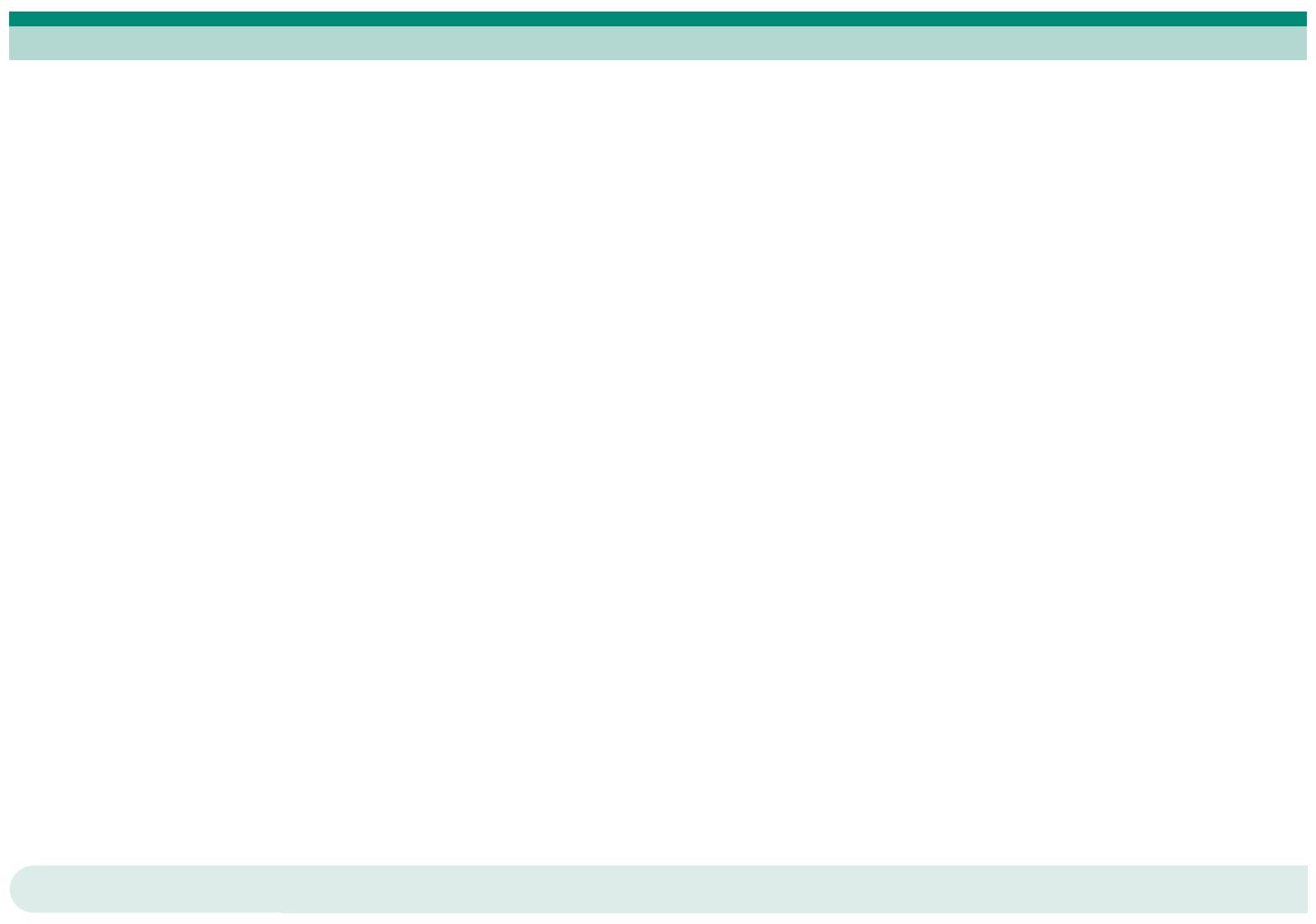


Continuous Professional Development Strategy for Additional Learning Needs in Pembrokeshire

Nichola Jones
Head of Inclusion and Disabilities

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Section 1 - Principles

Continuous Professional Development of Professionals working with children and young people with Additional Learning Needs.

Purpose

The purpose of this document is to set out the framework to be applied to the Continuous Professional Development process for professionals working within education and who support pupils with Additional Learning Needs (ALN) in Pembrokeshire County Council.

1. Principles

- Workforce planning is the process used to achieve the most efficient and effective workforce, ensuring the provision of the right people with the right skills in the right place at the right time. The workforce budget consumes a large portion of the resources within education. Planning for an efficient and effective workforce enables the best use of these resources.
- Having in place a system that identifies the needs of the school and specialised services workforce in relation to the provision for children and young people with Additional Learning Needs is fundamental.
- All teachers are teachers of Additional Learning Needs and will be expected to have the knowledge, understanding and skills to effectively meet these needs.
- The continuous development of educational practice needs flexible and timely responses, together with a commitment to investing in people. Giving a high priority to educating, training and developing staff is seen as critical to the overall effectiveness of provision for children and young people with Additional Learning Needs.
- It is the right of all children and young people that all staff who work with them are appropriately qualified and trained to meet their needs. The quality of the staff expertise and attitudes will have an impact on the delivery and provision for children and young people with Additional Learning Needs.
- All staff are entitled to high quality induction training and continuous professional development, so that they can confidently provide for those children and young people with Additional Learning Needs. Professional Development is not seen solely as a 'top up' of specialist knowledge but as an important aspect of professional life.

- Individual staff should take responsibility for ensuring that they have the understanding, knowledge, skills and attitudes to meet the diversity of needs present in schools. They are entitled to appropriate appraisal to support their professional development planning.
- Professional development should be planned to support staff in bringing about changes and improvements to education and other services. In particular, the move towards greater inclusion of pupils with Additional Learning Needs will be successful if it is accompanied by relevant, high quality professional development.
- The training should be provided within a coherent framework, both in relation to the needs of the individual personnel and also to the schools and specialised services.
- Opportunities should exist for acknowledging and sharing good practice and knowledge. Expertise is best shared through inter-professional collaboration, both within and across Local Authorities.

In addition to these principles and as part of Pembrokeshire County Council's Local Authority responsibilities the service is committed to:

- Consulting with education providers, services, professional associations and providers of professional development training to identify needs and resources.
- Monitor the effectiveness of professional development activities in relation to Additional Learning Needs and assist schools and learning centres in further developing their own approach.
- Develop partnership with other Additional Learning Needs Stakeholders and actively promote joint training with other agencies.
- Ensure provision for professional development of all Additional Learning Needs staff who are not school based.
- Initiate partnerships with other Local Authorities to plan and provide training in specialist areas where schools or single Local Authorities are unable to do so independently, particularly for staff working in 'low incidence' areas of ALN.
- Establish structures that promote a corporate approach to professional development in the fields of Additional Learning Needs and disability, involving staff from a range of relevant agencies.

Section 2 - The School Effectiveness Framework

The School Effectiveness Framework outlines the need for high quality teaching as being the bedrock on which effective educational performance is built, enabling children and young people to acquire skills, knowledge and the understanding needed to reach their full potential.

It describes the key characteristics required to build on existing good practice and improve children's and young people's learning and wellbeing throughout Wales, with each partner's contribution to securing that.

It requires that conditions are created that provide all children and young people with the best possible opportunities to learn, maximize their potential, and to reap the benefits. Equality is one of the major themes of the Framework following the Welsh Assembly's 'The Learning Country: Vision into Action' which explicitly states:

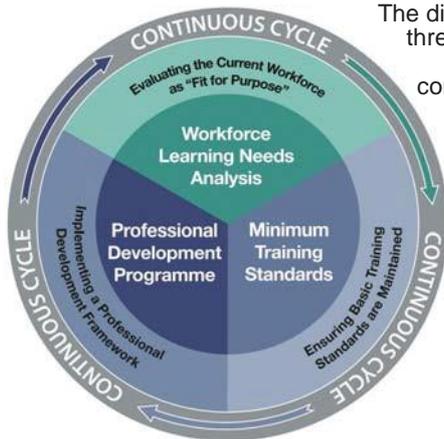
"We shall ensure that the benefits of improvements are enjoyed by all, in a fully comprehensive system of learning that serves all our communities well", and that we will "ensure that appropriate quality standards are in place to meet a range of additional needs".

The Framework describes a national purpose for schools which draws attention for the need to:

- Promote a culture of social inclusion and respect for diversity, particularly through developing the wellbeing of learners and personalising their learning.
- Establish strong professional learning communities in schools where practitioners can develop and share their professional knowledge on learning and teaching;
- Offer children and young people a curriculum that engages and motivates them to learn and to achieve their potential;
- Provide a learning community for all engaged in school life, with children and young people and their families at the centre, and including governors, teachers, other school staff and adults training to work in schools.
- Plan a training strategy to meet a wider range of children to include those with Additional Learning Needs, the roles of Higher Education, Further Education, external agencies and the particular role of SENCos and special schools are important.

Section 3 - A Continuum of Professional Development

The fundamental aim of Pembrokeshire's focus on inclusion is to ensure that the teaching experienced by all learners has a positive and sustained impact on the outcomes they achieve and their well being. Building capacity is based on establishing good practice in schools and empowering school staff to develop their knowledge and expertise to include all pupils. It is anticipated that in doing so standards will be achieved that ensure the best possible outcome for children and young people. To do this it is important to have a reliable and systematic process.



The diagram outlines the three key components that have been combined to form the continuous cycle of professional development:

Whilst it would not be feasible to train all teachers for meeting all children's additional needs it is crucial to:

- Decide what would be the basic requirements and training content for all teachers;
- Decide how to create a training structure for all teachers which both builds upon past experience, knowledge and understanding and provides the necessary skills for staff working in specific environments with individual children;
- Decide how to extend the skills, knowledge and understanding of some teachers who work with children with more complex needs

In planning to develop a programme that meets a wide range of needs in schools and the specialised service, it is also important to ensure the provision is right at different levels of training.

This includes:

- Induction
- Early Professional Development
- Continuous Professional Development
- Specialist Professional Development
- Leadership and Management

Section 4 - Approaches to Professional Development

Underpinning the development of the workforce to meet the needs of all children and young people are the components that help provide the necessary skills and resources. The key issue is that the workforce are able to access a range of professional development opportunities that increase their motivation, skills and understanding in relation to the provision of Additional Learning Needs.

There are a range of professional development opportunities all of which have different strengths. However, professional development activities tend to be “dominated by one day, ad hoc courses and whole-school inset days” (Gray 2005 p. 29). Although a “sheep dipping” approach, where all staff undergo the same formal training course, is tempting from the point of view of speed and standardization it is not necessarily effective. Ofsted (2006 p. 4) found that “staff benefited where a wide range of different types of Continuous Professional Development was on offer”. The model in Pembrokeshire intends to use a multifaceted approach, exploiting a range of avenues of learning.

Limitations of formal learning.

The decision by Pembrokeshire Inclusion Service to go beyond the limitations of formal learning reflects a growing recognition that formal development programmes cannot meet all development needs. Whilst such programmes can

be useful for providing a basic grounding in essential knowledge and theory, many professionals report that much of their learning is gained in informal settings, such as working in a team or being coached (Cheetham and Chivers, 2001). The formal “chalk and talk” courses, lectures and the ubiquitous PowerPoint tend to keep the learner in passive mode. A study of American teachers found that a feature of effective professional development was the opportunity for active learning (Garet and others, 2001). The Teachers’ Development Agency (2007) reached a similar conclusion. Active learning, which goes beyond theory and exposition, fits well with the principles of adult learning and is a characteristic of approaches such as action learning and mentoring.

There is a strong argument that much of what professionals do is intuitive (knowing without knowing how you know) rather than based on conscious, explicit reasoning. Claxton (2000) argues that too much emphasis has been put on the importance of intellectualised understanding at the expense of tacit or intuitive ways of knowing. This debate has important implications for professional development. Learning methods that focus on the articulation of theory or fact (e.g. formal courses) must be balanced by methods that enable a subtler, more implicit type of learning (e.g. keeping a reflective journal, undertaking secondments, shadowing etc)

Effective development relates to organisational needs and goals.

Where individual development is combined with the organisation's goals it is more likely to be effective, leading to changes in practice (Ofsted, 2006., Robertson and Jochelson 2006). Individual development should be seen as part of a wider stream of activity including performance management, improvement programmes and organisational strategy. This allows synergy and mutual reinforcement to occur. The Welsh Assembly Government's School Effectiveness Framework (2008) states the need for this systemic perspective, where there is coherence between actions in schools, Local Authorities and Government, in the improvement of education in Wales as a whole – in other words, there is a synergy between the organisation's goals (local authority) and individual goals.

However, development also needs to take account of the challenges, needs, career stage and aspirations of individual staff (TDA, 2007., U.S. Dept. of Education, 2000). This can best be facilitated by the active involvement of professionals in the planning and design of their own development. Learning is inevitably linked to the motivations and perceptions of the learners themselves, a matter of hearts and minds. If this is forgotten and a mechanistic approach prevails, sustainable improvement in practice is unlikely.

Traditionally, professional development has focused on the individual learner. But much valuable learning occurs in collaboration with others. In a survey across 20 professions, Cheetham and Chivers (2001 p. 271) found that working alongside more experienced colleagues and working as part of a team were among the most highly rated types of informal learning. Collaborative learning can take many forms, from networks of professionals sharing best practice (Welsh Assembly Government, 2008) to action learning, where teams address common problems and learn through shared practical experience.

Combining these themes within Pembrokeshire's inclusion strategy for professional development will require a much wider range of learning methods. These will include, but go beyond formal programmes towards a creative variety of activities where professionals learn with and from one another, blending learning and practice in pursuit of better schools and their own personal growth. It will be important that professional staff make use of new or informal styles of learning and provision made for a coherent overall sense of purpose and priority. This will promote the synergy required between professional development and service improvement to meet the needs of both.

4.1 Techniques

Introduction. The following are a list of some approaches to professional development, and shows some of the range of opportunities available, particularly those which do not depend on access to formal programmes. Many of the techniques can be blended or customised. For example, a mentoring relationship might include some coaching or a shadowing visit.

Action learning – combining learning and doing.

- What is it? Unlike traditional teaching models which provide past knowledge in the hope that it can be applied in the future, action learning starts with a practical issue requiring change. A group of people who share this issue then work together to plan, carry out and review actions intended to improve the situation. As the group goes through the cycle of planning, doing and reviewing, the learning that results from this is discussed and used to shape future action. Action learning blends learning and practice in a way that brings practical benefits and increased understanding. It is used for difficult or complex problems where the way forward is unclear. Although the idea is simple, the process is challenging as it demands a readiness to expose and develop our thinking in a group context. It is this that sets it apart from the usual task or project group. Participants gain a deeper understanding of their own practice and how it impacts on others. No tutor or

leader is required, although it is sometimes necessary to have a facilitator to help the group develop the skills and routines it needs to embrace learning from difficult problems rather than avoid it.

Mentoring – individual support on the learning journey

- What is it? The terms mentoring and coaching are often used interchangeably, but the two are different in many ways. Mentoring is a long-term relationship which focuses on significantly developing the capability and potential of the mentee over time. The mentee sets the agenda and the mentor facilitates their reflection and learning through questions and feedback. The mentor must have the experience and knowledge to be able to broaden or stretch the capability and thinking of the mentee. They must also have the emotional intelligence, particularly self-awareness, to help the mentee learn. This could be through active listening, providing feedback or introducing the mentee to people or resources that will help them grow. The mentoring relationship is a safe and confidential space where the mentee can explore their problems and frustrations without organisational consequences. For this reason, your line manager should not be your mentor. Although formal mentoring schemes can be helpful, it is critical that both parties are comfortable in working with the other.

The Mentor fulfils several roles

- Counsellor – sounding board, reflector, helping to clarify thinking
- Coach – focusing on particular skills
- Networker – introducing the mentee to the resources and people they need
- Guide – giving advice

Shadowing – seeing how someone else does it

- What is it? Shadowing is where time is spent with a person or sometimes a team as they go about their work. It enables the trainee to gain a level of insight into the work of another person or department that could not be acquired through reading or explanation alone. It provides the opportunity of seeing how the world or a particular issue looks from the perspective of the person being shadowed. It can be useful for:
 - Observing good practice in action
 - Developing good working relationships with partner organisations
 - Gaining an insight into the day to day reality of other people in their job roles
 - Viewing work or the work of your department from the perspective of clients or users

Shadowing can also have benefits for the host:

- Their work and point of view becomes better understood
- They can learn from their guest – particularly by seeing their own work through a fresh pair of eyes

It is important to establish the purpose and boundaries of the shadowing arrangement and be clear about how long it will last, what activities or meetings are off-limits, and what must be kept confidential. Depending on what you hope to learn, shadowing might be one visit or a series of visits. It may be concerned with the whole of someone's role or just a specific activity

Coaching. Developing important skills

- What is it? Whereas mentoring tends to be long term and broad in focus, coaching is typically short term and focused on a particular skill or outcome that you want to achieve. The starting place is a vision of what success would look like or clarity about the level or type of performance you aspire to. Then, using feedback from the coach a realistic picture is built up of current performance. The next step is to explore what could be done to lift your performance and then commit to a course of action aimed at improving that. This process is cyclical, so several coaching sessions may be needed at which progressively, clarification or refinement of vision, reviewing progress and the exploring of options is sought. The main benefit of coaching is that it is

customised to individual goals and your learning style. Coaching has been used for a huge range of purposes including:

- Improving presentation skills
- Career development
- Setting up in business
- Becoming more effective at managing time
- Developing facilitation skills
- Learning how to manage organisational change

Benchmarking visits – seeing good practice in context

- **What is it?** Benchmarking is a process used in many sectors to compare the performance of a department or organisation with others who do a similar job and who, overall or in a specific area, are seen to demonstrate good practice. Benchmarking involves more than visits. Comparisons of resources, policies, processes and key performance indicators can all be valuable. However, statistics and policy statements can never give the full picture and we should never imagine that only what is measurable is important. Visits can help for several reasons
- Non-measurable but critical factors in how a team or organisation performs, such as culture, working relationships and environment can best be experienced in a visit

- Seeing excellence in action, rather than just reading dry statistical measures, can be persuasive and inspirational
- Visits, and the face-to-face contact they facilitate, can help establish a dialogue between teams or organisations

To get the most out of a visit, preparation and planning is essential. You need to be clear about why you want to visit and what you wish to focus on. It is important to meet the people who actually do the work you want to learn from and not just their bosses. It's also helpful to consider how you can make the relationship reciprocal. Do you have examples of best practice or learning opportunities you can offer?

Guided reading – finding out what the experts say

- **What is it?** Guided reading is a common feature of many university courses. Students are provided with a list of written resources selected by tutors to provide a broad perspective on a subject. This enables them to understand the main current debates in the area they are studying. But guided reading can be used outside of formal education.

Central to the idea of being a professional is having access to a body of knowledge. However, many professionals find it hard to keep abreast of current ideas and innovations in their field. Pressures of time and the bewilderingly huge amounts of (sometimes poorly written) professional literature generated by academics and commentators mean that professionals

may not know where to start in updating their knowledge. In such circumstances it can be valuable for them to be guided towards certain books or articles which have been particularly significant in the advancement of thinking in their field. This can best be done by other practitioners who have a specialist interest or by academics whose role requires them to keep up-to-date with the literature. Instead of having to trawl through a large number of databases, journals and booklists, they can be guided to a few, critically important pieces of writing which are highly relevant to the issue or problem they are facing.

The benefit or impact:-

Impact can be enhanced by going through the discipline of summarising the main themes of the reading you have done or perhaps even presenting your summary and reflections to your colleagues.

Networks

- What is a network? Networks enable staff to exchange and combine knowledge to improve services. Professional or learning networks tend to have the following features:
- Common interest. Members share an area of interest, such as teaching a particular subject
- Active engagement. Members interact to share information, solve problems etc.
- Practice focused. Members are practically involved in the area focused on by the network

Networks may be large or small, local or global, face-to-face or online. Communications technology can help, but is not an end in itself

Why are networks so useful? As large organisations in all sectors struggle to keep abreast of change, networks have much to offer.

- Crossing boundaries. The number of professions and agencies involved in delivering public services leads to overlaps, gaps and even conflicts in provision. Networks, united by common interest and focused on practice, can operate across organisational and professional boundaries and hierarchies to help join up services
- Effective learning. Several studies have found that professionals find networking an effective way of learning (Cheetham and Chivers 2001). It enables them to exchange ideas and resources and obtain help with practical problems.
- Fast, Flexible and self-organising. Increasingly, organisations are looking for ways to liberate the talents and know-how of their staff through “purposeful networking” (Senge, 2008. P 243). Networks enable practitioners to address real issues without waiting for formal changes in policy or structure, giving them “access to emerging knowledge about school leadership, learning, teaching and children and young people’s wellbeing” (Welsh Assembly Government, 2006)

Section 5 - Determining the Needs of Inclusion Service Specialist Staff

Needs within the Inclusion Service are determined through a formalized review process. One aspect of determining the needs of the specialist staff is to review current levels of expertise in relation to the key objectives for the service. In the first instance the needs of the service are identified through the annual review process for each of the service areas, which includes an annual report outlining the achievements for each department and highlighting areas for development. From this process business plans are drawn up for the year setting no more than four targets. The annual performance management process for staff also runs alongside this process.

The central principle for all these activities is that specialist staff within the Inclusion Service work more effectively when they have a clear understanding of what is expected of them. Through the use of the performance management process objectives are set that relate to those identified within the Inclusion Service and development activities identified that support them to achieve the objectives set.

Through investment into the annual performance management process it is expected that the service is developed effectively, thus ensuring job satisfaction as well as high levels of expertise. Staff are also suitably supported and skilled to meet the changing needs of the service. The process is described more fully in the Inclusion Service Professional Development guidelines. (See Appendix 1)

Section 6 - Determining the Needs in Schools

Needs within schools in Pembrokeshire are determined through a formalized review process. This takes into account what the schools skills and strengths are, but also identifies areas that require further professional development of staff.

A meeting takes place as part of an 18 month cycle with the Head teacher, ALN governor and ALNCo of each school in the county and Senior Managers from the Inclusion Service. The meeting discusses how well the specialist provision from the Inclusion Service is working and to what extent school staff are able to meet the current needs of the children and young people with ALN. This process forms part of the 'Planning in Partnership'(PRIP) working and is aimed at helping:

- to develop the capacity of individual schools to provide for children experiencing difficulties accessing the curriculum
- to ensure individual pupils with complex needs access specialist outreach support
- to provide professional development and training as part of the Local Authority's Professional Development Programme within a cluster of schools as well as across the local authority.

6.1 The Learning Needs Analysis Process

The Learning Needs Analysis (LNA) helps to identify good practice taking place in schools, recognizing the knowledge and expertise of school staff in providing for all children and young people. In order to ensure that schools are able to meet the needs of all children and young people it is important that the school development plan and professional development strategy outline how staff will be equipped with the appropriate skills to meet the wider range of needs of children and young people including those with ALN.

Through carrying out the LNA annually, the strengths and weaknesses of the school workforce are identified. This information helps to determine how well equipped the school workforce are in:

- Identifying pupils with ALN
- Assessing and monitoring pupils with ALN
- Using the resources the school has in place
- Using the interventions the school has in place
- Partnership working
- Transition arrangements for pupils with ALN.

It also provides an overview of how well trained the workforce are in providing for children and young people with ALN and identify gaps in provision. The framework helps to measure progress in the development of the school workforce and ultimately the outcomes for pupils.

6.2 Minimum Training Standards for ALN

In planning to develop a programme that meets a wide range of Additional Learning Needs in schools and specialised services, it is important to ensure that a minimum amount of training is maintained for school staff which also considers the stage of development of the employee.

To do this it is important to:

- decide what would be basic requirements and what the learning content would look like;
- decide how to create a learning structure that builds on past experience, knowledge and understanding and provides the necessary skills for staff working in specific environments with individual children;
- decide how to extend the skills, knowledge and understanding of some teachers who work with children with more complex needs;

- decide how to extend the skills, knowledge and understanding of some teachers entering into leadership and management.

The table on overleaf provides a summary for a family of schools in relation to the minimum training standards that have currently been achieved and identifies specific training needs for the coming period.

The tiers include:

- Induction for newly qualified staff
- Early Professional Development
- Continuous Professional Development
- Specialist Professional Development
- Leadership and Management

6.3 The Team Around The Pupil, Parent And School

Once the needs are determined through the formal stages of the 'PRIP' review, the next stage is to implement a planned programme that will address the needs. The 'Team Around the Pupil, Parent And School' (TAPPAS) are groups of professionals that are being positioned in Pembrokeshire to support within a cluster of schools. Initially the team consists of a group of professionals from the advisory service and includes the link educational psychologist and specialist teachers from the Inclusion Service.

TAPPAS requires a fundamental change in the way the Inclusion Services have historically been delivered. It is based on a preventative approach and supports schools in building capacity to support the majority of pupils who are not always able to access the school curriculum because they are struggling with their reading, writing, social skills, co-ordination, speech and language or they may have difficulties with their vision, hearing or ability to physically move around the school.

Longer term it is expected that a wider group of multi-agency professionals become part of the localised team. The professionals, attached to a cluster of schools, act as a revolving team who see the schools on a regular basis to provide practical support. Sometimes the team work directly with individual children and young people, who have been identified as vulnerable or with complex needs and some of the time working with schools to develop their practice.

Section 7 - Evaluating Professional Development

1. The limitations of formal learning and the effectiveness of more active and collaborative forms of development (TDA, 2007., CUREE, 2007) that have been described in Section 4 of this document and also highlight the need for variety in methods of professional development (OFSTED 2006). The Inclusion Service managers are working with staff to explore creative alternatives to formal, classroom-based learning such as action learning, mentoring and coaching. An essential part of this strategy is to better understand the worth of such professional development activities and their impact on children. This section briefly highlights some of the issues in evaluating professional development and the actions which will enable the service to more confidently assess the value of the professional development that staff undertake in order to shape future activity and investment in this area.
2. Important issues in evaluating professional development.
 - i. Clarity of purpose. Information about professional development is generated and collected for several reasons including monitoring, evaluation and self-review. Monitoring answers the question “did we do what we set out to do?”, evaluation concerns the worth of the activity and its impact on children, and self-review is the practitioner reflecting on their own continuing learning and development. All are valid but may require different data and data collection methods. Before information is collected, there needs to be clarity about who it is for and how it will be used
 - ii. Appropriateness. As professional development moves away from the dominance of formal INSET type training, the methods used to record, measure and evaluate must also change to be appropriate to the development experience. The ubiquitous satisfaction form issued after training days is of limited use in evaluation in its true sense. More flexible methods, such as learning journals and team discussions need to be brought into the mainstream of professional development evaluation
 - iii. Measurement. It must be recognised that not everything important can be measured, particularly not in quantitative terms. Broadfoot (2003) warns against the tendency to not value that which cannot be measured. In addition, not all learning is conscious, linear and neatly packaged. Claxton (1997, p. 8) argues that “Often learning emerges in a gradual, holistic way, only after a period of casting around for a vague sense of direction”. Such learning cannot be recorded in a numerical or tick box way. Evaluation must allow for learning that emerges slowly and which may be only recorded in qualitative terms

iv. Team and individual. There are clear links between collaborative personal development, where teachers work together over time, and positive effects on student learning and teachers' attitudes to their pupils (CUREE, 2007). Professionals also rate collaborative learning highly (Cheetham and Chivers, 2001). Therefore some evaluation may be best carried out on a team or group basis. Using a team to review its own professional development enables a much richer range of perspectives and perceptions to be brought to bear (West-Burnham, 1998)

v. Professional development is only one ingredient in performance. In planning or evaluating professional development it should be borne in mind that it is "one key activity in a larger system of overall workforce development" (HFRP, 2005. P.2). Where there is congruence between the aims and strategies at school, departmental and individual level this is likely to promote effectiveness in professional development

vi. Types of evaluation. A variety of approaches exist.

These include

1. Questionnaire
2. Interview
3. Discussion
4. Reflective journals and learning logs
5. Practice/classroom observation
6. Pupil learning outcomes

The 2005 DFES survey found that teachers were positive about observations, logs and journals, discussion and the idea of evaluating over time as these provided for a richer and more interactive consideration of the worth of development. They were generally negative about questionnaires, the most frequently used method, seeing these as superficial and of little benefit to the individual practitioner

vii. Levels of evaluation. Guskey (Kreider and Bouffard, 2005) developed a five-level model for evaluating professional development (see attachment 1).

The levels are:

1. Participant's reactions
2. Participants learning
3. Organisation support and change
4. Participant's use of new knowledge and skills
5. Student learning outcomes

A DFES survey (DFES, 2005) found that whilst participant satisfaction (level 1) was almost always evaluated in the schools included in the study, changes in pupil learning outcomes (level 5) were rarely evaluated and, when they were, the evaluation was not done well.

3. Way forward. These suggestions are based on the assumptions that the Inclusion Service will need to track professional development activity as well as evaluate its worth, and that the methods used to gather information will themselves be subject to review. The suggestions are intended to provide the basis of a flexible system to plan professional development in line with organisational needs and to generate information about development activity for monitoring and evaluation purposes. They are also designed to make use of/build upon processes which may already be in place rather than set up new systems.
 - i. The foundation - appraisal/performance review. Regular appraisal provides the ideal forum for individual needs to be considered in the context of team/department/organisational priorities and for professional development actions to be discussed. It is also an ideal setting for a discussion on how individual practice has been changed by participation in professional development activities. Therefore, regular, meaningful appraisal where there is an honest two-way dialogue about performance should be seen as a foundation of good professional development and as essential for all staff. Where good quality appraisal is not taking place, support and advice should be provided to staff to enable them to acquire the skills they need
 - ii. Team discussion – collaborative planning and evaluation. Professional development should not be seen as an isolated, individual activity, but as an integral part of the way a team or organisation meets the challenges it faces. Teams need to periodically review their priorities together and plan actions accordingly. These actions will include the learning needed by individuals or the team as a whole. Ideally the teams meet every six months to review their strategic priorities. This context will allow for a review of ongoing professional development and planning for the future the team discussion should encourage collaborative approaches to professional development. It will also allow teams to agree evaluation methods suitable to the context and development method. A series of workshops with teams within the Inclusion Service are planned for Autumn 2010 to explore and encourage a team approach to planning and evaluating professional development
 - iii. Self review – the learning journal. The main point of reviewing professional development could be seen as enabling staff to reflect on and proactively manage their own learning in order to improve personally and contribute to improvement throughout the organisation (West-Burnham, 1998). Learning journals or logs enable professionals to reflect over time on the value and impact any formal or informal development. They can

be completed in a way and at a time that suit the individual and will inevitably be focused on their priorities. Also, they permit a wide range of information to be included. In connection with the workshops mentioned under point ii above, staff will be asked to keep a learning journal or learning log at least from the date of the first team CPD workshop to the date of the second, making at least one entry per week

- iv. Monitoring activity – basic questionnaire. Questionnaires have some drawbacks as evaluation tools, particularly when they are mainly concerned with participant's reaction to a workshop - the so-called "happy sheet". However, forms can be useful for monitoring purposes
- v. Review. The above suggestions are made on the basis of recent research and good practice. However, they are unlikely to be exactly right for this particular context without further learning and review!

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Appendix 1: The Formalised Performance Management Process for the ALN Specialised Service

Role of Line Managers within the Inclusion Service

The role of Inclusion Service Line Managers in the performance management process is based on the following three objectives:

- To review the performance and effectiveness of individual members of staff in their current job, celebrating good performance and enabling improvement where required
- To encourage individual members of staff to be actively involved and, in partnership with their employer, take responsibility for their own development.
- To identify training and other development needs of individual staff and compile an appropriate development action plan for the individual.

Role of the Individual

- To be committed to continuous improvement and learning.
- To take responsibility for and play a leading role in one's own development process.
- To work in partnership with their line manager to ensure self development is aligned with service targets and priorities.

- To plan and evaluate systematically, to ensure, and demonstrate benefit for self, service areas and where appropriate, pupils.

Key Elements of the Individual Performance Review Process

Performance management is an on-going cycle, not an event. It involves three stages:

1. A formal review which is likely to last for approximately one hour although for staff unfamiliar with the process the first few reviews may be shorter. This should not be a once a year paper exercise but should be the culmination of regular and continuous dialogue between the line manager and employee throughout the review period.

The process should include:

- A review of the employee's job description to ensure it is still accurate.
- The setting of clear concise objectives which are linked to the employee's current job description and the service objectives. Objectives should be set as the result of a collaborative, two-way discussion and should be agreed. They will cover the progress of service delivery, professional development together with any additional

responsibilities they may have. Teachers and support staff are expected to set an objective that is related to pupil progress. Employees are encouraged to make a self analysis prior to this review meeting as a preparation for a discussion aimed at agreeing objectives for the coming year.

- The identification of any development needs associated with the employee achieving the agreed objectives resulting in an individual development action plan. Upto three days of professional development activities should be identified for employees to engage in. In specific cases the study leave can be extended depending on the activity.
 - The line manager should record the jointly agreed objectives and any identified development needs associated with the objectives that will apply for the review period. If objectives cannot be jointly agreed the line manager will have the final decision and will set and record the objectives. It is the right of either party to involve the next level of manager in the organisation, in the event of any dissatisfaction or dispute.
2. A mid year review and, in the case of teaching/support staff, a work based observation to monitor progress. A minimum of one occasion of classroom observation each performance management cycle is required by regulations.

- Classroom observation is accepted good practice. In planning observation, it is important to bear in mind that:
 - Successful observation requires preparation and training, and a clear understanding on the part of the teacher/support staff and the line manager of why the observation is happening.
 - The nature of the observation will depend on its purpose. To be worthwhile, it needs to be structured in a way that enables the observer to focus on areas agreed beforehand.
 - It is important that the observer ensures that the lesson proceeds in as normal an atmosphere as possible.
 - Full, constructive and timely feedback offers an opportunity to discuss what went well, what might be done differently or better next time.
3. An end of year review of performance which is the opportunity for the line manager and member of staff to reflect on the employee's performance in a structured way, to recognise and celebrate achievements and to discuss areas for improvement and professional development. The end of year review will set the scene for the next cycle of performance management.

Scheme Documentation

- (i) Employee Performance Management
Guidance and Scheme Documentation
- (ii) Authorisation Form Training Course

(i) Employee Performance Management Guidance and Scheme Documentation



Section 1 - Personal Details (To be completed by Post Holder)

Period of appraisal: From _____ To _____

Full name: _____

Post title: _____

Employee number: _____

Directorate/Service: _____

Reporting Manager / _____

Supervisor: _____

Date of appraisal: _____

Your appraisal is an opportunity to discuss your job and the contribution you make to **your** team and Pembrokeshire County Council.

Please prepare for your Performance Appraisal (PA) meeting by considering:

- Your performance over the last twelve months (section 2)
- Potential work and development objectives for the next **12** months (section 3)
- Your learning and development **needs** over the next 2 months (Appendix 1)

At the Performance Appraisal **the objectives you have achieved** and **how you went about achieving them** should be discussed. Any objectives **not achieved** should also be discussed, and reasons for this **explored**. You will also **have** the opportunity to **talk** about your **performance** and **receive feedback** from your R porting Manager/Supervisor.

Section 2 - The last 12 months...

Use the table below to list the objectives agreed during your previous review and comment on how well they were achieved.

Objectives	Summary of Achievements
Objective 1:	
Objective 2:	
Objective 3:	

Use this space to record any other aspects of your job where you think you have performed particularly well in the past 12 months.

Which aspects of your job could be improved upon and how? (Think about your job as a whole; how could you improve how you carry out your job and what prevents you from taking action)



Pembrokeshire Employee Standard

Pembrokeshire County Council has a set of behaviours that employees are expected to demonstrate in their day to day activities. Although the main themes of the Employee Standard are listed below, you will also need to access the Standard to answer the questions on this page. The Employee Standard is attached to the Guidance Notes.

Themes	
<ul style="list-style-type: none"> Understands they are working as part of One Team Builds positive relationships and has a strong Customer Focus 	<ul style="list-style-type: none"> Delivers quality and Value for money services Self awareness/self development

Which behaviours in the Employee Standard do you feel you have applied particularly well over the last year? (Please give examples of how you demonstrated them)

Which of the behaviours in the Standard could be developed in your current role to further improve your performance? (Please give examples of how they will improve your work performance)

Reporting Manager/Supervisor's feedback. This box is for the Reporting Manager/Supervisor's feedback on the Post Holder's strengths and areas for development.

Section 3 - The next 12 months ...

Objectives are the specific results that you and your Reporting Manager agree should be accomplished in the coming year. When setting objectives it should be agreed **what** you should achieve, **how** you will accomplish them and by **when**. Your objectives should be **achievable yet challenging** and link to either the Key Outcomes and Improvement Objectives or Guiding Principle/s.

Key Outcomes (KO)		Improvement Objectives (IO)	
1	Children, young people and families in Pembrokeshire have the opportunity to lead healthy, happy and fulfilling lives	1A	School Effectiveness
		1B	Vulnerable Children
2	Pembrokeshire has a thriving and prosperous economy	2	Town Centre Improvement
3	People in Pembrokeshire enjoy an attractive, sustainable and diverse environment	3	Waste Management
4	People in Pembrokeshire are healthier	4	Reviewing Adult Social Care Services
5	Children and adults are safeguarded		
6	Communities in Pembrokeshire feel safe		

Guiding Principles (GP)

A	Customer focus	Satisfying customers' reasonable expectations and deliver services in ways that are convenient for them. Our job is to make life easy for our customers.
B	Value	Delivering high quality services through making prudent choices and by living within our means and by stripping out unnecessary process and waste.
C	One team	Working as one organisation; taking collective responsibility for our actions, sharing problems and working across internal boundaries to deliver appropriate solutions





Please indicate how your objectives link to either Key Outcomes and Improvement Objectives or Guiding Principle/s. You may also find it helpful to link your objectives to your Service Improvement Plan (SIP) if applicable.

Objective 1			
KO & IO Ref	Or GP Ref	SIP Ref if applicable	
How you plan to achieve this objective and by when		Notes on progress (to be completed during reviews)	

Objective 2			
KO & IO Ref	Or GP Ref	SIP Ref if applicable	
How you plan to achieve this objective and by when		Notes on progress (to be completed during reviews)	

Objective 3			
KO & IO Ref	Or GP Ref	SIP Ref if applicable	
How you plan to achieve this objective and by when		Notes on progress (to be completed during reviews)	

Objective 4			
KO & IO Ref	Or GP Ref	SIP Ref (if applicable)	
How you plan to achieve this objective and by when		Notes on progress (to be completed during reviews)	

Objective 5			
KO & IO Ref	Or GP Ref	SIP Ref (if applicable)	
How you plan to achieve this objective and by when		Notes on progress (to be completed during reviews)	

Objective 6			
KO & IO Ref	Or GP Ref	SIP Ref (if applicable)	
How you plan to achieve this objective and by when		Notes on progress (to be completed during reviews)	



Reporting Manager/Supervisor s Overall Comments

Post Holder s Overall Comments

Post Holder:

Please **sign** to confirm that you **agree** with the comments **made** and actions **identified** in this review.

Sign: _____ **Date:** _____

Reporting Manager/Supervisor:

Please **sign** to confirm that you **agree** with the comments **made** and actions **identified** in this review.

Sign: _____ **Date:** _____

A copy of this document should be kept by the Reporting Manager/Supervisor and the Post Holder. It may also be used for monitoring purposes by the Head of Service, Director or Internal Audit.

Appendix 1 - Learning and Development over the next 12 months ... To be completed by Post Holder and approved by Reporting Manager/Supervisor

In order to carry out your objectives/key tasks or improve your skills what learning opportunities would you like to undertake? (This could include: taking on extra responsibilities, shadowing a colleague, coaching others or being coached, attending a training event or doing something in your job for the first time).

Learning Opportunity requested	KO & IO / GP / SIP Ref	Training Approved?	
		Yes	No
1.			
2.			
3.			

Reporting Manager/Supervisor

Please **provide** reasons in the box below if you were not able to approve any or all of the learning opportunities requested above?

Post Holder Contact Details

Full name: _____ **Employee No:** _____

Post title: _____

Email: _____ **Tel:** _____

Reporting manager/Supervisor: _____ **Date:** _____

Please ensure that a copy of this page is sent to:

Paul Young, Corporate Learning and Development
Pembrokeshire Archives, Prendergast, Haverfordwest, SA61 2PE
01437 776412 · paul.young@pembrokeshire.gov.uk



(i) Authorisation Form - Training Course

Authorisation Form for Short Courses/Training Events/Seminars/Conferences

**Learning and Development
APPLICATION FORM**

COURSE:	
DATE(S) & VENUE:	
COURSE DETAILS:	

COURSE FEES:	
EXPECTED TRAVEL COSTS:	
ADDITIONAL COSTS: (RESIDENTIAL ETC)	

How do you hope your participation in this activity will impact on your professional practice?

How do you hope your participation in this activity will improve the service we provide?

How best could the value of this activity be assessed? (e.g. classroom observation, learning journal etc)

FULL NAME:
JOB TITLE:
DIRECTORATE:

STAFF NUMBER:
WORK LOCATION:
DEPARTMENT:

EMAIL ADDRESS:

SIGNED: _____ DATE: _____

AUTHORISED BY: (line managers name)

SIGNED: _____ DATE: _____

Inclusion Service

Supporting children
with additional learning needs

