

# SECONDARY TEACHER WORKLOAD STUDY REPORT

Lawrence Ingvarson  
Elizabeth Kleinhenz  
Adrian Beavis  
Helena Barwick  
Imelda Carthy  
Jenny Wilkinson

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# EXECUTIVE SUMMARY

## Overview of study

The study consisted of case study and survey components.

Fieldwork was initially conducted in twenty schools, mainly through individual interviews with principals and a small selection of middle managers and teachers. This work assisted the preparation of the survey instruments. Detailed case studies were written up for six schools. These schools were selected to provide a cross-section of school types and a range of workload issues.

Survey forms were sent to all New Zealand secondary schools during late 2004. Surveys were sent to the principal, up to five teachers and up to four managers within each school. Responses were received from 1150 teachers and 936 managers and 235 school principals. Replies were received from 357 schools. There was an average of 6 responses from teachers and managers for each school. There was a good coverage of age, gender and experience amongst the respondents to the survey. The study had data from a wide range of schools – schools that differed in size, location, social context, and traditions of governance.

## Actual workload

In the survey, senior managers (including Associate Principals, Deputy Principals, Assistant Principals and Heads of Faculty with more than five ‘salary units’) reported working on average 59 hours in the week prior to the survey, middle managers 52 hours and teachers 47 hours (this is referred to as *actual workload* in this study). These figures for actual workload do not differ significantly from earlier survey studies of teachers’ workload in New Zealand. However, teachers interviewed face to face during the case studies reported working an average of 43 hours per week. For managers the average was 51 hours. It can be seen that these estimates are lower than figures obtained from the survey.

## Manageability of workload

A new measure of *perceived manageability* of workload was developed for this study. While *actual workload* measured as the number of hours worked the previous week has some uses, it is not necessarily related to dissatisfaction or detrimental effects on teaching or health. Our measure of *perceived manageability* was designed to provide a measure of the latter. There was a strong association between *perceived manageability* of work and satisfaction with work. Middle managers were less satisfied than either senior managers or teachers with their perceived workload and the balance of this work with private life.

Senior and middle managers, on average, perceived their workload to be significantly less manageable than teachers. The following findings, however, give reason for concern about the extent to which both middle managers and teachers perceive their workload as manageable overall, and the extent to which workload is having

detrimental effects, particularly on the quality of their teaching, the support they can give to colleagues, and their health.

*Middle Managers:* 57% of middle managers thought their workload was unmanageable; 63% did not have good balance between home and work; 77% felt their workload was affecting the quality of their teaching; 84% felt their workload was heavy; 71% felt they could not do what they needed to do in a reasonable time; 23% were thinking of leaving their school because of the workload; 40% felt they have little time to get to know their students well; 70% felt they had no time to provide professional support to colleagues; 27% were thinking of leaving teaching because of the workload; and 47% felt their workload was adversely affecting their health.

*Teachers:* 48% of teachers felt their workload was unmanageable; 57% did not have good balance between home and work; 71% felt their workload was affecting the quality of their teaching; 75% felt their workload was heavy; 73% felt they could not do what they needed to do in a reasonable time; 21% were thinking of leaving their school because of the workload; 39% felt they have little time to get to know their students well; 66% felt they have little time to provide professional support to colleagues; 28% were thinking of leaving teaching because of the workload; and 43% felt their workload was adversely affecting their health.

## **Relationship between workload and other variables**

The survey component of the study revealed few statistically significant relationships between school size, geographic location (urban rural), type of school (e.g. secondary, composite), and governance (state, state-integrated, private), socio-economic status (decile level), ethnicity, single sex and co-ed schools – and actual or perceived workload. Any such relationships were weak. Gender did not appear to influence workload, except that females reported a slightly higher level of dissatisfaction with the balance between work and private life. There were few differences between school subject taught and workload measurability, except for Physical Education and Health (see Table 13, p. 96).

## **Factors related to perceived workload manageability**

This study was designed to enable analysis of the relative influence of a range of school factors on teachers' workload, as set out in the conceptual framework for the study. These included a set of designated stressors, level of school support, teacher autonomy, school innovativeness, staff collaboration, strength of school guiding values, and school leadership.

This study found that the main factors related to perceived manageability of workload were a set of potential stressors identified in the questionnaire, such as paperwork, student behaviour and class size. Perceived workload manageability was not, however, related to number of hours worked per week.

The most significant stressors for middle managers, the group who perceived their work as least manageable, were the numbers of hours they spent at school, the amount

of non-contact time, the amount of paperwork required, the level of resources, relations with other teachers and relations with parents.

For senior managers the profile of stressors was slightly different. Numbers of hours spent at the school, the amount of non-contact time, and the amount of paperwork were still the most important stressors, but developing new assessment procedures was also a significant stressor.

For teachers, once more the numbers of hours spent at the school was still a significant stressor, though less so than for managers. However, the amount of paperwork was equally significant as a stressor for teachers, as was the amount of non-contact time. The number of support staff in the school and performance appraisal were also significant stressors for teachers, though less so.

It is equally interesting to note the stressors that did not relate to workload manageability for the teachers and managers in this survey. These included class size, introduction of new curricula, developing new assessment procedures, accountability reviews, reporting requirements and collating and processing of assessment data.

The next most significant factors associated with manageability, for teachers and middle managers, were the level of support teachers thought they received from their school (e.g. I am given a real opportunity to improve my skills in this school), and the degree of autonomy they felt they had in their work. No associations were found between school innovativeness, school leadership, collaborative teaching, clarity of school values and workload manageability for teachers or middle managers.

## **How to improve workload manageability in schools**

Principals were asked about which factors would make workloads more manageable for: (1) themselves, (2) middle managers, (3) teachers. Managers were asked about which factors would make workloads more manageable for themselves and for teachers. Teachers were asked what would make the workload more manageable for teachers in schools.

Principals indicated that simplified compliance requirements, more teachers and greater ability to attract good teachers, and guaranteed planning time would assist in making their workload more manageable in schools.

Principals indicated that additional staff and guaranteed planning time along with reduced compliance requirements would assist in making the workload of managers more manageable in schools.

Principals felt that, on average, additional staff, guaranteed planning time, more support and more specialists were among the highest rated supports that would assist in making teachers' workload more manageable.

Managers saw additional staff, guaranteed planning time, reduced compliance requirements and the capacity to attract good teachers as most likely to assist in improving their workload. They also believed that these factors would be most likely assist the workload of teachers in schools.

Teachers saw additional staff, smaller classes, guaranteed planning time and more specialists as among the most important factors for assisting with their workload.

Typically, principals, managers and teachers saw increased support to reduce workload coming from the provision of additional staffing and additional provision for time to do professional work outside of the classroom.

### **Main findings from the case studies**

- Teachers and managers in five of the six case study schools found their work to be manageable most of the time, apart from certain peak periods during the year. However, many teachers and managers in other schools, visited in the fieldwork stage of the study, reported difficulty managing their workload.
- Teachers interviewed for the case studies reported working an average of 43 hours per week. For managers the average was 51 hours. These estimates are lower than figures obtained from the survey.
- Teachers spent an average of 22 hours on scheduled classroom teaching duties; 5 hours on other scheduled duties (home group, pastoral, yard duty etc.); and 2 hours on meetings. This is a total of 28 hours on formally scheduled activities. For managers, the corresponding figures were 16 hours (teaching) 3 hours (other scheduled activities) and 3 hours (meetings).
- Teachers and managers spent an average of 10 hours on professional activities outside the classroom, mostly marking and preparation. This work was done after and before school, in non-contact periods during the day, at weekends and in holiday periods. Some people preferred to work at home (the great majority did some work at home every week). Some liked to work at school in 'quiet' times when students and most other staff were not in the building and access to facilities and equipment was easier.
- All people interviewed showed very high levels of personal commitment to their work. For some, especially teachers in the Kura, the lines between duty and personal dedication were blurred.
- For some teachers, high levels of personal commitment appeared to be taking a toll in terms of stress.
- The main workload problem identified was that of finding longer, uninterrupted periods of time to complete professional duties outside the classroom.
- Most teachers and managers believed strongly that they themselves were the main 'managers' of their work. Principals agreed with this view.
- Teachers in four of the six case study schools said that student behaviour management did not cause them workload problems. However, this was not



the case in other schools visited in the fieldwork phase of the project, where teachers reported high levels of stress caused by poor student behaviour.

- Most people interviewed said that they were satisfied with the physical conditions of their work but workspaces were viewed by the researchers and found to be less than optimal.
- All people interviewed said that they needed more clerical and administrative support.
- All case study schools enjoyed strong leadership, and had good levels of professional community.
- Subject departments were the main units of professional community and professional learning.
- Heads of Department said that they enjoyed their work of leading and mentoring teachers, but that the time available for this was grossly inadequate.
- Principals', managers' and teachers' use of ICT varied between schools. On the whole the uptake of ICT was not great.
- People who used ICT regularly appeared to be more organised and more in control of their workload than people who did not.
- Teachers did not perceive performance reviews as stressful or too time consuming. Managers said that they did not have the time to carry out performance reviews to their satisfaction. Principals were anxious to protect teachers and managers from time consuming performance review processes.
- In most of the case study schools, NCEA implementation was mentioned as a major workload factor.
- The NCEA workload problems that teachers and managers resented most were those concerned with excessive paperwork.
- Teachers who understood the NCEA and philosophically supported it were much less likely to report problems with workload than teachers who did not, although these teachers, too, resented the amount of paperwork attached.
- Teachers generally felt that the work involved in implementing the NCEA was becoming more manageable as people were growing more familiar with it, though, overall, the NCEA curriculum and assessment procedures will entail a permanent increase in teacher workload over the previous procedures.
- Some examples of observed good practice in schools included an effective system for managing student welfare and behaviour (Hillary Boys' High School and a strong program of teacher professional development and capacity building (Gladstone High School).

## **Areas in which the greatest improvements could be made**

The research findings showed that there were few and low relationships between workload and school characteristics as school size, leadership style, geographic location, governing authority, or decile level. The findings suggest instead that factors that affect workload are largely common to all schools and teachers. This needs to be borne in mind when considering the following areas where improvements could be made.

**Areas for improvement fall under the headings below:**

**At the system level:**

- 1 Compliance
- 2 Curriculum and assessment requirements, including the NCEA
- 3 Performance review
- 4 The nature and pace of change
- 5 The amount of paperwork
- 6 Recognising and rewarding effective teaching

**At the school level:**

- 7 Actual workload: deployment of teachers' time
- 8 Student behaviour management
- 9 Working environment and access to resources in schools
- 10 Building a professional culture in schools, professional development, professional community and leadership
- 11 The work of Heads of Department
- 12 Use of ICT in schools.

**At the individual teacher level:**

- 13 Variation in individuals' capacity to manage workload efficiently and effectively
- 14 Recognising what motivates teachers
- 15 Unrealistic expectations and burnout.

These areas were categorised for convenience of identification. There is a great deal of overlap between them.

# **CHAPTER ONE: INTRODUCTION AND DISCUSSION OF PREVIOUS STUDIES OF TEACHER WORKLOAD**

## **Background and aims of the study**

In November 2003, the Report of the Ministerial Taskforce on Secondary Teacher Remuneration, noted that workload pressures were a key concern of teachers who had provided feedback to the Taskforce. The Taskforce considered that further examination was needed of:

- the role of the teacher, and unit holders
- the workload they carry
- current best practices of workload management in schools and
- the structures teachers work under.

For this reason, the taskforce recommended that a study be undertaken to consider how the work of teachers, and particularly middle managers, could be better structured, resourced and organised in order to support more effective classroom teaching.

During the negotiation of the Secondary Teachers' Collective Agreement in 2004, the Post Primary Teachers' Association (PPTA) and the Ministry of Education agreed that the research would inform work on secondary teacher workload to be undertaken jointly by the PPTA and the Ministry as part of a long term work program.

In August 2004, the Ministry of Education, New Zealand commissioned the Australian Council for Educational Research (ACER) to undertake a study of the workload of teachers and middle managers in New Zealand secondary schools. The research was to consider how the work of teachers, particularly that of middle managers, could be more effectively structured, resourced and organised in order to support more effective teaching and learning.

(Note: Secondary teachers who are employed in New Zealand state and integrated schools work under the terms and conditions of the New Zealand Secondary Teachers Collective Agreement. The current Agreement is effective from 5<sup>th</sup> August 2004 to 30<sup>th</sup> June 2007).

Specifically, the study aimed to:

- research the workload of teachers and middle managers in New Zealand secondary schools
- identify factors that affect teachers workload, and the connections and relationships between these factors
- identify areas where improvements could be made

The study was underpinned by research-based understandings of how the work of teachers and middle managers as individuals, team members and leaders best supports teaching and learning.

Maintaining this perspective was designed to ensure:

- (i) that discussion and analysis of the nature and patterns of the work of teachers and middle managers in schools was carried out with primary reference to teaching and learning objectives
- (ii) that identification of areas for improvement in the structuring, resourcing and organisation of the work of teachers and middle managers would be connected to and would lead to improvement in teaching and student learning.

Understanding how the workload of teachers and managers is managed across the school entails more than knowing what tasks are performed by whom, how long those tasks take, and identifying possible imbalances in the distribution of those tasks. It requires investigation of the extent to which teaching staff are able to exercise the professional knowledge and skills to perform the tasks for which they have been trained and how they are supported. It also entails understanding how teachers and managers feel about their work - which tasks and aspects of it they find most and least satisfying. And it involves identifying and understanding the many factors and stressors that impinge upon teachers' work. Some of these factors and stressors are specific to individual schools, some are characteristic of school systems, and some are issues that are common across the profession of teaching.

The study aimed to arrive at a better understanding of how teachers' and middle managers' workload might be managed. With this end in view, it gathered, analysed and discussed information about:

- the hours and conditions of teachers' and middle managers' work
- school contexts
- school structure and organisation
- interaction with the education system and agencies outside the school
- the professional and cultural conditions of teachers' working lives

It then sought to identify and understand the connections between these factors and teachers' perceptions of the manageability of their work, and their levels of satisfaction with their work. It also aimed to gauge the extent to which teachers' levels of enthusiasm, commitment, perceptions of efficacy, job satisfaction, willingness to learn and willingness to innovate were affected by their actual workload and their feelings about its manageability.

## **Previous studies of teacher workload**

Previous studies of teachers' workload, conducted in recent years, informed all four phases of the study. A selection of findings from some of these studies is provided below. An attempt is then made to draw from them some common threads about teachers' workload and the issues that affect it.

## **Study 1: Addressing Teacher and Management Workload in Secondary Schools: New Zealand Ministry of Education, 2001.**

The aim of this project was to identify examples of school practices and initiatives that contributed to a reduction in teacher workload, and to encourage the sharing of these practices between schools.

A project researcher visited 35 schools and spoke with teachers, principals and Heads of Departments to find out what practices schools were adopting to address workload.

The identified practices fell into seven categories:

- Innovative timetabling
- Use of technology
- Effective use of support staff
- Staffing procedures
- Student guidance and classroom management
- Management and administrative practices
- Schools restructuring through school support initiatives

Many successful practices were found within each category. These are some examples:

- Scheduling the first period each Friday for staff to work on NCEA related activities and professional development (with permission from the School Board of Trustees)
- Using teacher relief funding and funding from other sources to employ additional teachers
- Providing all teachers with lap-top computers and encouraging their suitable use for administrative and curriculum purposes
- Using special grants to work collaboratively with other schools in the development of ICT resources and applications
- Using non-teacher support staff to monitor student attendance, provide ICT and other clerical support and do interval and lunchtime duties
- Limiting meetings and moving to a 'school within a school' structure, with associated perceived pastoral advantages

As part of the same project, a second researcher prepared a report based on a literature search of the most efficient and effective use of resources to support teaching and learning in New Zealand and internationally. This report suggested that schools should focus on the following areas when making decisions about resource allocation:

- Teaching and learning at the classroom level
- Teacher professional development
- School improvement
- Establishing systems and procedures that support teacher effectiveness
- Creating a positive school ethos

The report pointed out that the findings of research on resource allocation should be looked at in conjunction with ‘school effectiveness’ research:

Many of the factors associated with effective schools (such as effective leadership, shared vision and a positive school ethos) do not necessarily have large, or any resourcing implications. Yet those factors are enormously important in promoting successful teaching and learning. (Annesley, 2001, p. 2)

The researcher noted the importance of teacher quality and the associated resource implications. In particular, she pointed to the need for teachers to be given adequate non-contact time for classroom preparation and teaching and for schools to invest in teachers’ professional development. From the research literature on the effective use of para-professional staff in schools, she found that the value of para-professional staff such as teacher-aides and classroom assistants was likely to depend on the quality of those staff and the ways in which they were deployed in schools and classrooms. Support for these staff, she suggested, should include the setting up of structured programs and training to work effectively within those programs.

The danger of the ‘multiplying effect’ where new initiatives were continually added without removing or altering existing strategies was also recognised. The report noted the need to constantly monitor and measure effectiveness and to review existing strategies in terms of cost effectiveness, before adding new ones.

## **Study 2: A summary report of Te Hiringa i te Mahara: Research and Evaluation: New Zealand Ministry of Education 2002**

Te Hiringa i te Mahara is a professional development program that aims to assist Maori teachers to manage their workloads through building their professional capability. It was developed in response to research that indicated that Maori teachers have much higher workloads than other teachers.

In 2002, the New Zealand Council for Educational Research (NZCER) carried out a comprehensive evaluation of the program. The evaluation considered how Te Hiringa i te Mahara was contributing to four objectives:

- A demonstrable reduction in the workload-related stress experienced by Maori secondary teachers
- Positive changes in the ways Maori teachers viewed themselves and their capabilities
- Building the professional capability of Maori teachers
- Better teaching practice outcomes (directly and indirectly) attributable to Maori secondary teachers participating in the programme.

The evaluation included a national survey of Maori secondary teachers, to which there were 566 responses. Workload stood out as the major issue for 43% of the 470 teachers who identified concerns in their professional lives.

Nine percent of respondents to this survey said that their workload was 'fine', 55% said that their workload varied (neither 'fine' nor 'excessive') 11% said that it was 'bearable' and 25% said it was 'excessive'.

Principals and deputy principals were more likely to express negative views about their workload, although they were just as likely as other teachers to have good morale and to find their work satisfying.

Similarly, teachers who were involved in counselling Maori students and in managing student behaviour problems said that while these activities added to their workloads, they found them satisfying. These teachers also enjoyed providing general pastoral care, extra curricular activities and other cultural activities, despite the additional strains these activities placed on workload.

Over 90% of teachers who responded to the survey of participants in an ICT professional development program that was part of Te Hiringa i te Mahara said that increased skills in ICT resulting from the program had a positive impact on the management of their workload and helped them to manage workload stress.

The evaluation showed that, through increasing the professional capabilities of Maori secondary teachers, Te Hiringa i te Mahara had greatly helped them to manage their workloads. It had also led to increased confidence and work satisfaction, improved teaching knowledge and skills and increased commitment to continuing professional development.

### **Study 3: Teacher Workload Survey commissioned by the New Zealand Post Primary Teachers Association (PPTA) (Massey University 1995)**

In 1995, the PPTA commissioned a report on secondary teacher workload. The report details survey responses from 498 teachers considered to be typical of the New Zealand secondary teacher workforce.

#### **Hours of work**

The survey found that an average working week for teachers and managers in 1995, i.e. time spent in 'school related activities' was 50.58 hours during term time. Classroom teachers worked an average 47.35 hours and managers an average of 59.78 per week. Only one third of these hours was spent on classroom teaching. Generally, teachers spent a quarter of school holiday time on school related work.

#### **Workload**

In 1991, the report states, teacher workload was perceived to be 'moderate'. In 1995 it was viewed as 'extremely heavy'. Workload was seen to have increased because of the additional administrative duties that were due, in particular, to new developments and changed practices in curriculum and assessment.

67% of teachers surveyed identified increases in administrative duties as a major cause of increased workload. Fractionally under 47% identified the implementation of the qualifications framework as a major cause, and just under 55% named the

National Curriculum. 63.9% felt their preparation for teaching had been adequate and all teachers felt the need to spend time on continuing professional development.

### **Impact of workload changes**

Teachers surveyed believed that more time spent on administration and curriculum development had adversely affected the quality of their classroom teaching and lesson preparation. Extra curricular activities had also suffered because there was less available time.

53.7% of respondents said that increased workload had impacted adversely on lesson preparation. 65% said that their classroom teaching had suffered because of recent demands on workload. 61.1% reported that increased workload had had a detrimental effect on extra curricular activities.

Over two thirds of teachers said that increased workload had negatively affected their physical and emotional health. They reported that this had also caused them to have problems in the areas of friendships, relationships, family life and leisure activities.

71.5% of respondents to the survey said that the workload changes had had adverse effects on their emotional well being, 65.5% on their physical health, 72% on their family life, 65.5% on relationships with friends and 77% on leisure activities.

### **Commitment**

Almost 60% of teachers surveyed said they would leave teaching when an opportunity arose.

### **Summary**

The researchers for this study concluded that:

The general picture has emerged of secondary teaching being considered by secondary teachers to be extremely demanding, requiring more time commitment than is recognised and increased involvement in administrative and curriculum improvements with insufficient accommodation of existing role requirements and responsibilities. (New Zealand Post Primary Teachers Association, 1995, p.3)

## **Study 4: The National Survey of Secondary Schools: New Zealand Council for Educational Research (NZCER ) 2003**

For this survey, 95 principals from a range of school types and deciles, 744 teachers from a range of curriculum subjects, 180 school trustees and 503 parents of students responded to comprehensive questionnaires seeking information with regard to school deciles; issues of school funding; issues of school staffing and school size; workload issues; morale; teaching and assessing the curriculum; ICT and learning; reducing disparity in learning opportunities; and professional development for principals and teachers.



This study found workload to be high among principals and teachers. Principals were found to be working an average of 67 hours per week and teachers were working an average 17 hours per week above class contact time. Most teachers and principals wanted a reduction in the amount of paper work and clerical/administrative work they were required to do.

NCEA implementation, it was found, had increased teachers' workloads, but many teachers were asking for more curriculum change, especially in the area of introducing critical and creative thinking. Lack of time was seen as a barrier to making curriculum changes. In general, principals were more supportive of the NCEA than teachers. However many teachers rated the NCEA implementation as the major achievement for the 2002-2003 year. Successful implementation was associated with higher morale and negativity about the NCEA was associated with negativity about the services provided by the MOE.

Survey responses showed that teachers were more likely to use ICT for low level applications such as word processing than for more complex curriculum related work. Many teachers preferred to work at home, using their own computers. They were not reimbursed for the associated costs.

Overall the study showed that principals' morale was higher than that of teachers and that teachers who were fully involved in the collegial environment of the school had higher morale than those who felt excluded from collegial sharing and decision making.

Teachers' non contact time, the survey responses showed, was used mainly for face-to-face interactions with students, colleagues and others in the school community. This meant that such tasks as marking and preparation had to be carried out in after school time. Unsurprisingly, in view of this, one third of teachers were wanting increased non-contact time.

## **Study 5: Teacher Workload Study Department for Education and Skills (DfES) (UK) December 2001 PricewaterhouseCoopers**

PricewaterhouseCoopers carried out this study between March 2001 and December 2001. It was commissioned by the DfES (UK) to identify the main factors that determined the workload of teachers and head teachers and to develop a program of action to manage workload effectively.

Researchers conducted fieldwork in over 100 schools, held discussions with many national and local bodies, and attempted to benchmark teachers' hours of work against other UK occupations and against overseas teachers.

### **Identified workload issues**

The study identified a number of workload issues:

#### ***Hours worked***

Teachers without management responsibilities were found to work an average of 52 hours per week during term time. Middle and senior managers worked more hours

than teachers (56.2 in primary schools, 58.6 in secondary schools). Head Teachers worked the highest number of hours (60.8 in secondary schools, 58.9 in primary schools).

Teachers and head teachers were found to work more intensive weeks than other comparable professionals and managers. Over the course of a year, teachers' hours of work were comparable with those of other managers and professionals, but those of Head Teachers were greater.

### ***Lack of control/ownership***

Teachers and some head teachers and senior teachers reported perceptions of lack of control and ownership over their work. This was largely because they felt compelled to complete so much documentation and 'paperwork', which, in their view, did not directly relate to teaching and learning and could be done by support staff.

### ***Making the most effective use of staff***

The investigators found that many routine non-teaching administrative tasks in schools were being carried out by teachers. The obvious solution to this – employing more non-teacher support staff – was being impeded by several factors:

- Cost: Teachers can absorb tasks other than teaching at no extra cost
- Role demarcation: Many teachers felt that some non teaching duties, such as pupil supervision should only be carried out by teachers
- Space and infrastructure: Some schools lacked space and suitable working conditions for non-teacher support staff.

### ***Use of ICT***

The study noted various ways of using ICT to make teachers' work less onerous and more effective in terms of both management and curriculum. It also noted restrictive factors:

- Lack of equipment at school and at home. The researchers noted that this was especially significant in view of the amount of work teachers did outside the school day and at home.
- Lack of skill, due in part to insufficient or unsatisfactory training
- Lack of software compatibility and failure to share software and expertise between schools
- Lack of technical support
- Lack of central direction within schools

### ***Redesigning some processes***

The Report identified a need to redesign some processes, in order to increase efficiency and effectiveness. These processes included lesson planning, marking students' work, student supervision, and reporting and assessment. They also included the structure of the school day and aspects of timetabling.

### ***Pupil behaviour***

Many teachers were experiencing great pressure as a result of the perceived mismatch between rising expectations of schools and increasingly poor student behaviour. They

felt that there was now less support from parents and carers. This issue was clearly more significant in some schools than in others.

### ***Professional development (PD) opportunities***

Many teachers disliked spending time away from their classes to participate in PD. Their absence also caused difficulties at the school. After school PD was difficult because teachers were tired at the end of the day and because of the extra workload.

### ***The role of the head teacher***

Teachers believed that head teachers did not always recognise the workload issues involved in constantly striving for high quality, or the need to help manage staff workload in these circumstances. Only one third of head teachers believed it was their responsibility to actively manage teacher workload, stating that this was the professional responsibility of teachers. One problem for head teachers who attempted to reduce teachers' workload was the pressure from agencies outside the school to improve standards.

Some tasks that teachers found burdensome were generated at the school, rather than system level. These included requirements for detailed lesson plans, student records of achievement and reports to parents. These were sometimes linked to principals' perceptions of requirements from inspection teams.

### ***Head teachers' and managers' workload issues***

Head teachers' workloads were higher than the average for comparable professionals – by 300-400 hours per year. They felt the pressures of the nature and pace of change, and the need to show achievement of high quality education in their schools. Some felt inadequately supported by staff and ICT.

Senior teachers and middle managers reported strains in combining teaching with pastoral and administrative roles. Some felt inadequately trained and supported in carrying out their management roles. Planning and preparation for their teaching suffered as they struggled to find time for pastoral and management duties.

### ***The role of government***

Teachers felt that possible demands on their workload were not always taken into account when new initiatives were being planned at national and local levels. They believed that changes often placed schools at a disadvantage because of inadequate notice and insufficient training and support.

Issues of trust were also identified. Teachers said that their views and aims were often in sympathy with those of the government. They wanted to be able to deliver higher standards but often felt impeded by lack of trust. They asked for fewer demands for documentation and more freedom to innovate and take risks.

### **Options for improvement**

The study noted the need to address these issues by improving the effectiveness of the support being given to schools.

We believe there is much to be gained in addressing these issues. Not the least is the more effective use of the considerable investment being

made in schools in terms of achieving improved teacher morale, better retention rates and school managers equipped more fully to respond to demands made for change. The key to this is creating and supporting, on an annual basis, the capacity and the professionalism needed to underpin the drive for higher standards that parents and pupils are entitled to expect. (Pricewaterhouse Coopers, 2001, p.2)

*Specifically, a strategy to reduce workload would need to:*

- Remove excessive tasks from teachers, senior managers and head teachers
- Improve teachers' sense of ownership of their work and long term commitment to teaching and make them feel trusted
- Enable schools to make better use of support staff
- Enable schools to make better use of ICT
- Support schools in redesigning processes
- Facilitate more co-operative planning
- Improve the timing and availability of PD opportunities
- Improve change implementation and communication between central government and its agencies and schools

### ***Process redesign***

#### *Lesson planning*

Three 'process redesign' options for reducing teacher workload were tested:

- Better access to electronic schemes of work
- 'Fit-for-purpose' daily and weekly planning
- Collaborative long and medium term lesson and curriculum planning

One canvassed option was to introduce (paid) planning days prior to the first school day of each term.

#### *Marking classwork and homework*

The researchers estimated that time spent by teachers in marking could be reduced by a quarter if good practice guidance and support materials could be developed and used to develop whole school marking policies that considered teachers' workload.

#### *External marking*

The researchers suggested paying teachers involved in marking 'coursework' the same as external examiners. Or, alternatively, providing extra non-contact time. Another suggestion was to create 'Chartered Examiners' who would provide rigorous internal assessment of external qualifications.

#### *Recording pupil data*

The researchers believed that there should be much greater use of ICT in this area. While the recording itself would still be time consuming, effective and efficient means of recording data using ICT, with the probable involvement of non-teaching support staff, would save time on other tasks such as reporting to parents.

### *Reporting to parents*

The options canvassed in the Report included greater use of reporting software and more flexible arrangements for parent evenings. The researchers observed considerable variation in time spent by schools producing similar reports. Some schools made efficient and effective use of sophisticated software, others required teachers to write all reports by hand, and there were a range of report writing practices in between these two extremes.

### *Supervising pupils outside lesson times*

Some schools visited during the fieldwork phase of the study had managed to organise pupil supervision using support staff. Some evidence showed that this practice could result in worsened pupil behaviour once they returned to lessons, and increased strain on senior staff with pastoral and discipline responsibilities. However, the researchers saw merit in the practice, provided that support staff were given adequate training.

### *Removing school trip and other general administration from teachers*

The Report noted the high organisational and administrative workload that was attached to school trips, and usually carried out by teachers. It favoured delegating more work to non-teacher support staff to manage arrangements for school trips and other general administrative tasks. It also suggested increased use of ICT for such administrative purposes.

### *Use of electronic pastoral tracking systems*

The study recommended the use of databases to track pastoral issues such as behaviour management, with support staff handling administration elements. The databases could be part of a whole school integrated ICT based data management system.

### *Introducing a more flexible school day or year*

The study found that the ‘drivers’ of teacher workload were class contact hours, the amount and nature of such tasks as preparation, planning and marking and the efficiency with which these tasks were carried out within available resources. Researchers concluded that changes to the school day or year would not be effective unless they affected these ‘drivers.’

Suggestions for increased flexibility that could lead to improved workload included making the school day longer while maintaining the same contact hours for teachers. This approach, the researchers argued, would also allow for more efficient use of the school buildings and facilities. It would allow teachers who wished to work more contact hours, for more pay, to do so. If significant numbers of schools chose to pursue this idea, a more flexible school holiday schedule might also be considered.

### *Changes to the school year*

The study found that most teachers were ‘lukewarm’ about the effects possible changes to the school year – e.g. the introduction of a six or eight term year – might have on workload. They visited a number of schools running a five-term year and found that teachers were happy with this arrangement. However they concluded that re-arranging the school year was in itself unlikely to reduce teachers’ workload and chose not to make any proposals for change in that area.

## *Different combinations of staff in schools*

### *Administrative and managerial support*

The study found a need for increased administrative and managerial support for head teachers, teachers and senior managers.

The research found that primary teachers spent 1.6 hours per week on general administrative tasks, and secondary teachers 2 hours. In secondary schools, administrative support staff was found to be most effective when managed by the faculty or subject area. The Report recommended that extra support staff be provided and that some of these staff should be available before and after school.

### *Learning Support Assistants and Classroom Support Assistants*

The Report recommended increased numbers and more efficient deployment of Classroom Support Assistants (CSAs) and Learning Support Assistants. (LSAs). (LSAs support pupils with special learning needs. CSAs provide general support to the teacher and assist the learning of groups of students in the classroom.) The Report noted that teachers' access to CSA support varied widely between schools, it favoured increasing this support so that all teachers had access to some CSA time.

The Report envisaged that part of the role of CSA support staff would be teaching pupils, in small and whole groups, under the supervision of a qualified teacher. This support would be 'such that the teacher would be free to take on a range of work whilst the support staff member was taking the class and therefore receive non-contact time when it was scheduled.' (PricewaterhouseCoopers, 2001, p.45)

### *The use of support staff in pastoral management and support roles*

The Report recommended the wider application of a model of 'learning mentors' to work with and support pupils. This was a feature of the 'Excellence in Cities' program and was found to be working well in schools visited during the fieldwork phase of the study. The researchers favoured the idea of an integrated pastoral support system in schools, using specialist pastoral staff such as learning mentors with links to school welfare officers and educational psychologists. They noted and agreed with comments of head teachers that academic support should not be separated from pastoral support.

### *Additional support for school attendance duties*

The researchers found that approaches to following up and recording student absences varied widely between schools. These included the use of a variety of electronic devices and data systems that were managed by non-teacher clerical support staff, with follow up by (non-teacher) attendance officers. The report favoured the wider use of automation and 'off the shelf' electronic applications together with transferring the work associated with tracking pupil absences from teachers to support staff. They also advocated sharing and applying the school models that were found to be working well.

## **ICT**

The Report noted the need for increased teacher access to and use of ICT. They recommend that all teachers have access to school networks and appropriate ICT; that access to and quality of web-based resources should be improved and that teachers

should have more access to electronic whiteboards. They also recommend more support in the use of ICT, including help-desk support to teachers.

### ***Introducing guaranteed non-contact time***

The researchers point out that they have used the phrase ‘Guaranteed Non Contact Time’ (GNCT) in the Report because it is a term that is commonly used in schools and related agencies. They noted, however, that more useful definitions might develop in terms of the ways in which that time was used. (One school they visited called it ‘Monitoring and Support’ time). Recognising that there are now greater requirements for teachers to be accountable for student learning, the researchers thought it reasonable that extra time be made available to teachers for planning, preparation and assessment. Teachers who participated in the study ranked non-contact time higher than any other specific measure that would be likely to reduce workload.

*Options for increasing non-contact time were identified as:*

#### *Reducing pupil-taught time*

Most teachers did not support this. The Report did not believe it was worth considering ‘in its own right.’

#### *Increasing pupil teacher ratios*

The researchers saw examples of this in team teaching arrangements and in classes like PE, where one teacher was able to take larger groups, thus freeing up another teacher. However, they felt that these approaches were ad hoc and likely to have little impact in the long term.

#### *Creating additional teaching time*

The Report stated that the most ‘obvious’ way of providing more non-contact time for teachers would be to employ more teachers. The researchers considered the cost implications of this, noting that the recruitment of an additional 3000 teachers would yield around 10 minutes non-contact time for each teacher.

#### *Supporting learning through staff other than teachers*

The Report recommends the employment of more in-class non-teacher support staff to provide teachers with more non-contact time

#### *Supporting learning using ICT*

The researchers observed one school in which up to 100 pupils were able to learn in five ‘ICT suites’ supervised by a senior teacher and an ICT technician. This freed up a substantial amount of non-contact time and was supported by the teachers in the school. The Report recommended further consideration of this strategy. A similar strategy was the use of ICT for distance learning of older pupils.

### ***Improving the role of government, agencies and governing bodies***

In response to head teachers’ and teachers’ claims that governments and agencies are insensitive to impact of changes on schools, the Report made the following suggestions:

### *Introduction of an 'Implementation Review Unit' (IRU)*

The IRU would:

- Scrutinise new policies before they were implemented to ensure that they met certain good practice criteria
- Feed back helpful advice to policy teams
- Track the effects of change and alert the Schools Workforce Group if there appeared to be risks of overload at the schools level
- Provide ways of attending to issues as they arose during policy implementation

### *Improving the support to schools through structural change, better co-ordination and better customer-service*

The Report noted the need for better co-ordination and communication between the various bodies and agencies that made demands (sometimes conflicting) upon schools. Many of these bodies were finally responsible to the DfES. The Report also noted the need to address a number of customer service issues, such as volume of communications, difficulty in getting through to switchboards, and staff who appeared to be badly informed, bureaucratic and patronising.

### **Summary**

The PriceWaterhouseCoopers study found that about a quarter of the participating schools managed their workforce very effectively, two fifths of the schools managed their workforce in generally satisfactory ways, but with weaker areas, and just under one in ten were not sufficiently capitalizing on the strengths of their employees.

In summary, the study found that the schools that managed their staff most effectively were those that:

- ***Managed the culture***, by creating a climate in which staff could work co-operatively and productively
- ***Managed the staff***, by implementing policies and programs to ensure that suitable staff were recruited, deployed and had on-going professional development
- ***Managed the working environment***, by creating the conditions that enabled staff and students to feel motivated and enabled to work effectively
- ***Managed change***, by 'harnessing the energies' of the workforce to plan for and introduce changes that led to on-going improvement and higher standards.

## **Study 6: The International Teacher 2000 Project.**

### **Chief aim of the project and key questions**

The chief aim of the International Teacher 2000 project was to investigate the consequences for teachers, in terms of career motivation and work satisfaction, of some of the major changes to education systems that occurred in a number of developed countries from the late 1980s onwards.

Over 3000 teachers in four countries (Australia, New Zealand, UK and the USA) were surveyed for the project. The research set out to discover how teachers and



school administrators felt about their work through investigating the following ‘key questions’:

- Why do teachers enter teaching?
- How do teachers feel about teaching?
- How do teachers feel they are regarded by their employer and society generally?
- What aspects of their role do teachers find to be satisfying?
- What do teachers find to be dissatisfying?
- Are satisfaction levels changing?
- Is teacher pre-service and in-service training adequate to meet the needs of today’s and tomorrow’s teachers?
- How are teachers coping with change and the pressures being placed upon them?

### **‘Domains’ for discussing work satisfaction**

The researchers suggested a broadening of the discourse for discussing teachers’ satisfaction/dissatisfaction with their work. ‘Older’ models of occupational satisfaction, they said, were limited to discussing teachers work within two ‘spheres’ – (a) the actual work of teaching, (b) the conditions under which the work must be performed. They proposed a ‘third Domain’ that encompassed factors at the broad system level as well as wider social economic and political forces. They claimed that ‘*The Teacher 2000 Project*’ marked the first time the pressures from the education system and societal levels were documented and fully recognized.’ (Scott, Stone and Dinham 2001, p. 7)

### **Findings**

‘Not unsurprisingly’ the researchers found considerable variation in satisfaction according to the individual schools in which teachers were currently employed. Some localised aspects of the work that caused dissatisfaction also varied from country to country according to local conditions (e.g. a long standing pay dispute and changes to promotion were issues for some Australian teachers, whereas in the UK, the teachers registered their dissatisfaction with elements relating to the National Curriculum, and OFSTED inspections). However, teachers’ responses to core issues were found to be ‘remarkably consistent’ across the four countries. (Scott, Stone and Dinham, 2001; Dinham & Scott, 1996; Scott, 1999; Harker et al., 1998.)

In all four countries, teachers were found to be highly motivated by a desire to work with people and to improve the learning and life chances of their students by helping them to reach their potential, experience success and grow into responsible adults. Teachers found this aspect of their work to be highly satisfying:

In all four countries, satisfaction remained high on a small focused set of ‘core business’ aspects of teaching. This satisfaction occurred at the personal levels of working directly with children: experiencing success with pupils/students, working co-operatively with other members of the education community, and professional competence/development. (Scott, Stone and Dinham, 2001; p. 4)

Teachers in all countries also commented that they welcomed the opportunities for professional growth and the learning challenges presented by their choice of career. They felt professionally fulfilled because their occupation allowed them to use personal qualities such as flexibility, creativity, the capacity to respond to challenges and to grow as individuals.

### ***The effects of social changes on teacher work satisfaction***

However, despite these positive factors, teachers involved in this project rated their overall work satisfaction as 'low' and many teachers became more dissatisfied as their careers progressed.

In all four countries, teachers found themselves dealing with issues that were the result of massive social changes, as schools were increasingly seen to be appropriate agencies for dealing with societal problems. Teachers expressed pain at seeing how children's lives were affected and felt frustrated and overburdened by what they saw as their new obligations to deal with these issues. In addition to the daily 'coping' with poor student behaviour, often the result of such factors as family breakdown and physical/mental abuse, came extra nurturing, counselling, and the need for constant communication and co-operation with parents, carers and outside agencies.

### ***Perceived lack of trust in teachers' professionalism***

The researchers claim to have uncovered a 'policing mentality among administrators' resulting in 'an anxiousness to standardise and document all aspects of the work, lest quality be compromised by leaving too much to the judgement of practitioners.'

The introduction of many more reporting and documenting requirements, as well as the standardisation of many aspects of teaching, contributes both to the much noted increase in overall workload and to the erosion of the sorts of pleasures of the job described above, i.e. flexibility, challenge, creativity, working with and for people. (Scott, Stone and Dinham, 2001, p. 8)

The research claimed that, as well as creating a welter of unnecessary paperwork, the emphasis on 'auditing', external assessment and standardized testing was eroding teachers' professionalism in two ways:

- (1) By lowering the status of and respect for teachers. ('symbolised' for many teachers, by low rates of pay)
- (2) By limiting the scope of teachers to exercise professional judgement, independence and to perform 'real teaching'.

### ***Erosion of professional relationships***

Some evidence was found that attempts to change the way schools were managed had made schools less collegial. Teachers who participated in the Project expressed fears that 'managerialism' had replaced educational leadership. They were also concerned that principals had been given the responsibility to implement changes that neither they nor the staff supported.

## **Conclusions of the International Teacher 2000 project**

The researchers concluded that teachers' work had been greatly and adversely affected by the social, political and economic changes that occurred at a global level in the latter part of the twentieth century. No amount of 'positive thinking', 'working smarter' or other 'fashionable solutions', they said, could relieve the 'intensification' (Hargreaves 1994) of teachers' work that resulted from these changes.

They claimed that the aspects of the work that teachers find most satisfying –meeting the educational needs of children through using their own special talents of creativity, intelligence and flexibility – were being compromised by circumstances beyond the schools' and teachers' control. The efforts of education systems to provide solutions to problems whose origins were in the wider social and economic spheres had only made teachers' workload heavier and their responsibilities more onerous. Of particular note was that the expansion of external requirements for auditing and assessment had resulted in the erosion of teachers' professionalism, extra and more complex documentation, unnecessary paper work, and increased workload and discontent among teachers.

## **Common threads to be found in the previous studies**

The six studies of teacher workload summarised above have some interesting common threads. Consideration of these should contribute to better understanding of the issues addressed in later sections of this Report.

### **Workload as numbers of hours spent in teaching-related activities**

The Teacher Workload Study commissioned by the New Zealand PPTA in 1995 and carried out by Massey University found that an average working week for teachers and managers in 1995, i.e. time spent on 'school related activities' was 50.58 hours during term time. Classroom teachers worked an average of 47.35 hours per week and managers an average of 59.78 hours per week. Only one third of these hours were spent in classroom teaching.

The Teacher Workload Study carried out by PricewaterhouseCoopers for the (UK) DfES in 2001 found that teachers without management responsibilities were working an average of 52 hours per week during term time. Middle and senior managers worked more hours: 56.2 hours in primary schools and 58.6 hours in secondary schools.

### **Reasons for increased teacher workload**

Reasons for increased teacher workload were identified by the studies at (a) the international social, political and economic level; (b) the education system level; (c) the school level, and (d) the individual teacher level.

#### ***(a) At the international social, political and economic level***

*The International Teacher 2000* project claimed that teacher workload had increased in the final decades of the twentieth century as wide reaching social, political and economic changes caused teachers to 'confront' new problems. These were, broadly, of two kinds: (i) welfare and discipline problems which were the effects of social disruption and (ii) 'erosion of professionalism' and workload intensification as

schools were required to be more ‘accountable’ so that nations could address the challenges of globalisation and associated trends.

The *International Teacher 2000 Project* was the only workload study reviewed which addressed teacher workload issues at this level. However, the 1995 PPTA commissioned *Teacher Workload Study* documents teachers’ concerns about increased workload (seen as ‘moderate’ in 1991 and ‘heavy’ in 1995). There seems to be an implication in this study that increased teacher workload is due to the kinds of circumstances pointed out in the *International Teacher 2000 Project*. The PricewaterhouseCoopers and other studies reviewed have concentrated on issues at the system, school and individual teacher levels. The present (ACER) study has also chosen to take this approach.

***(b) At the education system level***

The studies agree on the kinds of system level factors that contribute to increased teacher workload. These include activities related to compliance and accountability, auditing, performance management, and various manifestations of curriculum ‘reform’, e.g. literacy and numeracy programs and other initiatives designed at central levels for implementation in schools. ‘Paperwork’ was frequently mentioned as having negative effects on teacher workload as was the pace and manner of change. Of interest was the finding in the PricewaterhouseCoopers study that the views of teachers were often in sympathy with those of the government, but that teachers often felt impeded because of lack of trust.

***(c) At the school level***

Teachers surveyed in the Teacher Workload Study, DfES (PricewaterhouseCoopers study) and the International Teacher 2000 Project said that workload increases were largely due to the demands upon them that were being made by school management in response to system initiatives. These studies and the *Te Hiringa i Te Mahara* study also identified problems of student behaviour and welfare as major reasons for increased workload. Most suggested improvements in managing teachers’ workloads were targeted at this (school) level. (See below)

***(d) At the individual teacher level***

None of the studies explicitly identified reasons for increased workload at the level of the individual teacher. However the recommendations for improvement, especially those for improved teacher professional development, in several of the studies recognised the importance of teacher quality and implicitly suggested that some teachers have better knowledge, skills and ability to manage workload than others.

**What teachers find ‘unsatisfying and ‘satisfying’ about teaching**

Teachers who participated in all five studies agreed that the elements of their work which they found most satisfying were those that had most bearing on their contact with children and their ‘core work’ of helping children to reach their potential. Teachers in the *Teacher Workload Study*, *DfES*, *Te Hiringa i Te Mahara*, and *International Teacher 2000 project* identified student behaviour and welfare problems as contributing to increased workload, but the Maori teachers said that, despite the increased workload, they found that working to help children with problems was very satisfying.

In studies that addressed this issue, teachers agreed that the elements of their work that they found most unsatisfying were those they perceived to be unconnected with their core work of teaching students. They particularly disliked the ‘paperwork’ connected with accountability and auditing, partly because of the tedium of the work itself and partly because it made them feel undervalued and untrusted. Many teachers who participated in the *International Teacher 2000 Project* objected to having to perform work they saw as being properly in the domain of counsellors and psychologists. Many were distressed by the problems of disturbed children.

### **Strategies to improve workload**

Study 1: *Addressing Teacher and Management Workload in Secondary Schools* and Study 4: *DfES Teacher Workload Study* (PricewaterhouseCoopers) suggested similar strategies for improvement. These included:

- The re-design of a wide range of school processes such as lesson planning, marking classwork, homework and reporting to parents
- More flexible and responsive management and administrative practices at the system and school levels
- Making more flexible and effective use of teaching and support staff by identifying the duties they could be expected to perform efficiently and effectively
- Improved policies and systems for dealing with student welfare and behaviour
- Timetabling changes and changes to the ways in which time was used in the school day and year
- Making effective use of ICT for administrative and curriculum purposes

### **Additional issues that have been addressed in the present (ACER/Ministry of Education 2004-5) project**

This study considered all of the issues that were identified in the previous studies of teacher workload. Both the case study and survey elements of the project were informed by the findings of these studies. They were designed to explore the relevant issues in depth and to discover relationships between them as they affected actual workload, participants’ views of workload and teachers’ levels of satisfaction with workload.

Additionally, the present study sought to identify other relations and contrasts that might help to understand actual workload, perceived manageability of workload and levels of satisfaction with workload.

The survey instruments were constructed to show contrasts between:

- Managers and teachers
- Area schools and other schools
- Schools in different geographic locations
- Different types of school
- Schools governed under different authorities
- Schools with different deciles of socio-economic status
- Single sex and co-educational schools

- Males and females
- Subject areas taught
- Workspace differences

The researchers were particularly interested to discover the effects of a series of 'stressors' identified in the case study phase of the project. These stressors were:

- The amount and type of paperwork required of teachers
- Number of hours spent at school
- 'Reviews' for accountability purposes and performance appraisals
- New assessment procedures and new curriculum
- How change is implemented at the school
- Resourcing
- Interruptions to teaching
- Student behaviour
- Relations with parents
- Class sizes
- Amount of non-contact time
- Collation etc. of assessment data
- Number and use of support staff
- Dealing with outside agencies and dealing with parents

On the basis of information about these elements, collected from the survey and case study data, this Report offers an analysis of the workload of teachers and middle managers in New Zealand secondary schools. It identifies the main factors that affect teachers' and middle managers' workload, and the connections and relationships between these factors. Finally it identifies areas where improvements could be made.

## **CHAPTER TWO: APPROACH TO THE STUDY AND METHODOLOGY**

### **Approach to the study**

When deciding on an appropriate way to approach the study, the researchers had the advantage of previous research findings into teachers' workload in New Zealand and overseas (see previous chapter). These studies and other research on teachers' work indicated that a comprehensive investigation of secondary teachers' and middle managers' workload would need to go beyond a basic analysis conceived of simply in terms of hours and conditions. It would also need to consider the many factors that influence teachers' and middle managers' workload, and to probe the complexities of these people's professional lives.

A major consideration was the need to identify whether actual workload or teachers' perceptions about manageability of workload were such that teachers were unable to perform their core work effectively. Underpinning the research was the simple proposition that a genuinely overloaded, overworked teacher would find it so hard to teach effectively that the learning of students would be impeded. Or, put another way, if workload issues were getting in the way of teaching and learning, children's education would be compromised.

Similarly to the teacher workload study carried out by PricewaterhouseCoopers for the DfES in the UK, the approach decided upon for the ACER study in New Zealand secondary schools was to carry out a broad investigation of aspects of teachers' and middle managers' work, and of perceptions of the manageability of workload. The study also set out to explore those factors within and beyond the control of schools that were affecting teachers' workload, and to identify areas where improvements might be made.

The PricewaterhouseCoopers Study was found to be notable for the broad range of issues it considered, for the honest and courageous way in which it addressed some of the more sensitive of these issues, and for its practical focus on possible areas for improvement. The ACER study aimed for similar breadth, honesty and practicality.

### **Methodology**

To ensure the necessary understanding of key issues affecting workload in New Zealand secondary schools, the study commenced with a series of in-depth conversations between five researchers and principals, teachers, and managers in twenty schools in varied locations in the North and South islands. Six of these schools were subsequently selected as the subjects of case studies. To ensure breadth, principals, middle managers and teachers in all New Zealand secondary schools then completed surveys that were informed by previous research and by findings from the fieldwork stage of the project.

The project was carried out in four phases:

- Phase 1      Fieldwork in twenty selected schools. During this phase, researchers interviewed principals, teachers, middle managers and members of School Boards of Trustees. They also collected a range of documents from each school.
- Phase 2      Development and administration of surveys of teachers, principal and middle managers in all New Zealand state, state integrated and independent schools where secondary teachers work. The survey questions were based on previous research into teachers' workload, other research on teachers' work and on an analysis of findings from Phase 1 of the project.
- Phase 3      Analysis of findings based on the conceptual framework of the study.
- Phase 4      Preparation of a Final Report

### **Phase 1 Fieldwork in twenty schools**

This phase commenced in August 2004, following the first meeting of the research team with the Project Reference Group in July.

In this phase, five researchers conducted interviews with principals, deputy principals, members of school boards of trustees, middle managers and teachers across twenty secondary schools.

#### ***Selection of the twenty schools***

The twenty schools were selected to give a spread along a number of different dimensions that were hypothesised to be related to workload in the school. These dimensions included:

- School size
- School location
- School type and authority
- Decile
- Single sex or co-educational

These dimensions were treated as strata in drawing the sample.

To conserve resources, the selections were made from the most easily accessible administrative regions; Auckland, Canterbury, Manawatu-Wanganui, and Wellington regions.

Schools within these regions and strata were randomly selected and then shown to the members of the Project Reference Group for their advice on the selection. A small number of schools were changed as a result of advice from the Group. A random selection within the relevant strata was made to replace these schools.



## *The school visits*

### *Documents*

The researchers requested the following documents from school principals:

- School policies (e.g. student welfare; ICT; class size and composition)
- Teaching allotment lists, providing details for the face-to-face teaching allotments of all teachers (number of class periods per week, subjects taught, etc.)
- Yard duty requirements/rosters
- Lists of 'other' or 'extra' duties for all teachers, details of middle management positions, including remuneration, number of management units, time allowances and job descriptions
- School timetables, including the main 'general' school timetable and any others, e.g. a timetable of ESL classes and/or ESL timetable
- Details of class sizes for all teaching groups
- Meeting schedules and instructions regarding meeting attendance
- Records of teacher replacement classes taken
- Other documents that would yield information useful to the study.

### *Interviews (See Appendices 5 and 6 for Interview Schedules)*

All interviews were tape recorded with the agreement of the person interviewed. The interviews were semi-structured and took place either in the principal's office or another room provided by the school. Most lasted for approximately one hour or a 50-55 minute class period.

#### *Interviews with the principal*

Principals were invited to discuss the school documents and to provide necessary clarification and comments. They were then asked to talk about how they viewed the management of teacher workload, the extent to which teachers and middle managers in the school saw their workload as manageable and the factors that impinged on workload. Specifically, they were asked to comment on:

- Workforce management issues they felt to be of concern
- Innovative school policies and practices for workload management
- Structuring of roles of Heads of Departments (HODs) and other managers, and possible alternatives considered by the school
- How schools prioritised their use of entitlement staffing, and operational and other funding
- The impact of ICT on the work of teachers and middle managers.

#### *Interviews with teachers and middle managers.*

These interviews were constructed to be conversations about workload. Teachers and middle managers were invited to speak frankly about their workload and the factors that affected it.

Interview questions focused on workload issues. They included questions on:

- Teachers undertaking non-teaching tasks that could be performed by non teaching personnel
- Stress factors such as seriously unacceptable student behaviour, marking ‘overload’ and the prevalence of ‘critical incidents’ involving various school community members, including parents
- ‘privatisation of practice’ where teachers worked in isolation rather than as members of professional learning communities
- Organisational factors such as management of blocks of time, the arrangement of teaching spaces and the distribution of workload during the year
- Support, in terms of prioritisation of resources, physical working conditions and professional development
- Distribution of leadership, whether individuals were, or were not, encouraged to develop their special talents and share them with colleagues in professional learning teams and mentoring relationships
- Structuring of the roles of HODs and other middle managers
- Use and impact of ICT
- Impact of government policies and initiatives, e.g. performance review and curriculum and assessment changes, especially the NCEA.

### *The case studies*

The researchers compiled comprehensive field notes for all twenty schools visited. They then developed case studies for six selected schools. The case studies and a cross case study analysis are included in this Report.

#### *Selection of the case study schools*

The selection of case study schools was made on the basis of school characteristics – six different kinds of school with different kinds of workload issues – in order to provide coverage of a variety of themes.

The schools selected as case study schools were:

- A small rural school where the school’s curriculum is taught in the Maori language. The time required to translate curriculum materials into English was identified as an important workload issue.
- A single sex, traditional school in a provincial town. An important issue here was reconciling the traditional values of the school with external demands, especially the NCEA. This was causing time problems as teachers tried to maintain traditional levels of extra curricular involvement as well as implementing the new curriculum. For some teachers it also caused a philosophical problem – why change when the older ways were seen to be working so well? These issues were creating tensions that impacted strongly on some teachers’ perceptions of their workloads.
- A large and prestigious independent co-educational city school. This school has strong traditions of ‘excellence’. Teachers’ perceptions of their workload were observed to be strongly influenced by the ethos of the school.

- A state integrated girls' school (city). This school was also interesting in the way strong shared values – the values of religious education – influenced teachers' perceptions of their workload.
- A small Area School, with workload problems that were linked to size.
- A modern, multi-course co-educational high school in a rapidly developing area that is changing from rural to suburban. This school provided an interesting model for effective workload management and curriculum implementation.

The case studies provide a range of factual information about the workload of teachers and middle managers in each of the six schools. This includes the number of hours spent on the various tasks that comprised workload both in and out of school hours. The case studies also document the perceptions of principals, middle managers, members of School Boards of Trustees and teachers about workload, and the ways it was managed in the school. They also explore respondents' views on a variety of factors that affect workload, including: student behaviour management/pastoral care; resources and support; leadership and vision; professional community; professional development; extra curricular activities and government policies and initiatives, especially performance review, Education Review Office (ERO) reviews and the NCEA.

### **Phase 2 Development and Administration of Surveys (See Appendices 1, 2 & 3 for copies of the Questionnaires)**

Surveys were sent to all New Zealand secondary schools late in 2004.

Separate surveys were developed for principals, managers and teachers. Principals were asked to select randomly:

- One senior manager in the school (a deputy principal or equivalent)
- Three middle managers and
- Five classroom teachers

Survey forms were then to be distributed to the staff selected.

Each survey took about 40 minutes to complete. Respondents returned the completed surveys to the New Zealand Council for Educational Research (who worked with ACER on the project). Forms were forwarded to ACER for data entry, processing and analysis.

#### ***The surveys asked respondents to reply to questions about:***

- *personal details* of respondents (e.g. gender, age, ethnicity)
- *work history* (e.g. pre service teacher education, years of secondary teaching, years in management roles (managers only)
- *current work* (e.g. position in school, main teaching subjects, contact with outside agencies)

- *workload* (e.g. number of minutes spent on particular tasks and activities over last seven days, perceived manageability of workload)
- *professional development* (e.g. whether in-school or external, provision for continuation and feedback)
- *job satisfaction* (e.g. working relationships with colleagues, working time/private life work balance,
- *stress* (e.g. class sizes, relations with parents, student behaviour management)
- *aspects of the school* (e.g. vision, professional community, leadership, values)

### **Phase 3      Analysis of survey findings**

The study drew on survey data from a wide range of schools that differed in location, size, social context and traditions of governance. Contrasts were made between:

- Managers and teachers
- Area schools and other schools
- Schools in different geographical locations
- Different types of schools
- Schools governed under different authorities
- Schools with different deciles of socio-economic status
- Single sex and co-educational schools
- Males and females
- Subject areas taught
- Whether a dedicated workspace was satisfactory or not

Associations were also investigated using:

- Years of teaching
- Proportion of teaching time at the senior year levels
- The number of students taught in the previous term
- The number of hours taught in the previous term
- A range of stressors (e.g. student behaviour management, introduction of new curricula) associated with teaching in a school

The analysis sought to understand the extent to which the above factors were associated with changes in the following six workload variables:

- The number of hours spent in all job related activities over the last seven days
- The number of minutes spent in formally scheduled activities over the last seven days
- The number of minutes spent in professional activities outside the classroom over the last seven days
- The number of minutes spent in clerical activities over the last seven days
- The extent to which, overall, the workload of teachers in the schools was perceived to be manageable

Finally, the analysis described what teachers, managers and principals saw as possible 'solutions' to workload problems in schools. Principals were asked about factors that would make workload more manageable for themselves, for middle managers and for teachers. Managers were asked about factors that would make workload more manageable for themselves and for teachers. Teachers were asked what would make workload more manageable for teachers in schools.

#### **Phase 4      Preparation of a Final Report**

The Final Report presented the findings of the research, an analysis and discussion of the findings, and identification of areas where improvement could be made.

## CHAPTER THREE: THE SURVEY DATA

This chapter describes results using data from surveys to principals, school managers and teachers.

### The surveys

Survey forms were sent to all New Zealand secondary schools during late 2004. Surveys were sent to the principal, up to five teachers and up to four managers within the school, along with a reply-paid envelope for each questionnaire. The principal was asked to randomly select:

- One senior manager in the school (a deputy principal or equivalent)
- Three middle managers, and;
- Five classroom teachers.

Survey forms were then to be distributed to those staff selected. See Appendix 1 for copies of each of the survey forms.

### Overview of the data

The data file used for this report was created by appending the data from the teachers and managers together using only the questions common to both surveys. (See Appendix 2, which shows which questions were used when the data were appended.) Subsequently, questions unique to the teacher and manager questionnaires were merged with this file. Once these data were combined, data from the principal survey and administrative data from the Ministry of Education were merged using the school number as the key.

### The respondents

Table 1 shows that a total of 2086 cases were available, of which 1150 came from teachers and 936 came from managers. Data were received from 235 school principals. Replies were received from staff in 357 schools. There was an average of 5.8 responses (SD = 2.2) from teachers plus managers for each school.

**Table 1 Number of teachers and managers replying to the survey**

	Frequency	Percent
Teacher	1150	55.1
Manager	936	44.9
<b>Total</b>	<b>2086</b>	<b>100.0</b>

Senior managers and middle managers were also identified. Those who indicated that they were an associate, deputy or assistant principal were classified as 'senior managers'. Those who were heads of faculty and who had five or more management units were also classified as senior managers. Middle managers were those who reported that they were a head of faculty with less than five management units, a head

of a department, a teacher-in-charge, assistant head of faculty or assistant head of department, a guidance counsellor, dean or in an 'Other' (management) position at the school. Of all the managers who replied, 30.5% were senior managers and 69.5% were middle managers.

## **The schools**

The study had available data from a wide range of schools – schools that differed in size, location, social context, and traditions of governance. Appendix 7 provides the details.

## **Descriptive statistics**

This section of the report provides information about a selection of the variables from the surveys contrasting senior managers, middle managers and teachers.

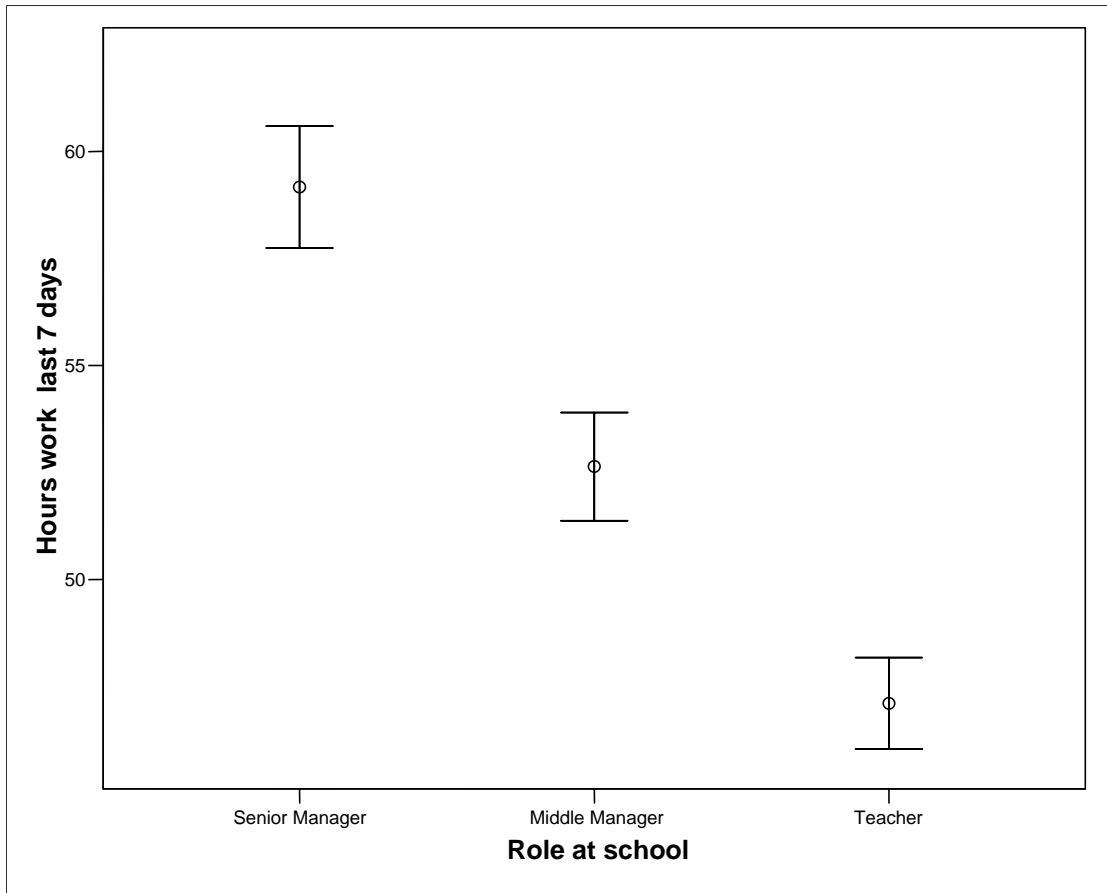
Figure 1 shows the mean number of hours worked over the previous seven days for senior managers, middle managers and teachers. In Figure 1 the mean is indicated by the small circle midway along each vertical bar. The vertical bar shows the 95% confidence intervals – that is, the range along which we would expect to find the mean from repeatedly drawn samples of the size used in this study. As these intervals do not overlap for senior managers, middle managers or teachers, it can be concluded that at a 95% level of certainty that there are (statistically significant) differences between each group of respondents<sup>1</sup>, with increasing hours associated with increasing levels of responsibility in the school.

Figure 1 shows:

- Senior managers worked an average of 59.2 hours (SD = 12.05) in the previous seven days.
- Middle managers worked an average of 52.6 hours (SD = 16.17) in the previous seven days.
- Teachers worked an average of 47.1 hours (SD = 17.78) in the previous seven days.

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<sup>1</sup> Strictly, the data used here are not from a randomly drawn sample so inferential statistical procedures are not appropriate. However, the use of confidence intervals serves as a guide and helps to avoid making unwarrantedly precise claims about the data.



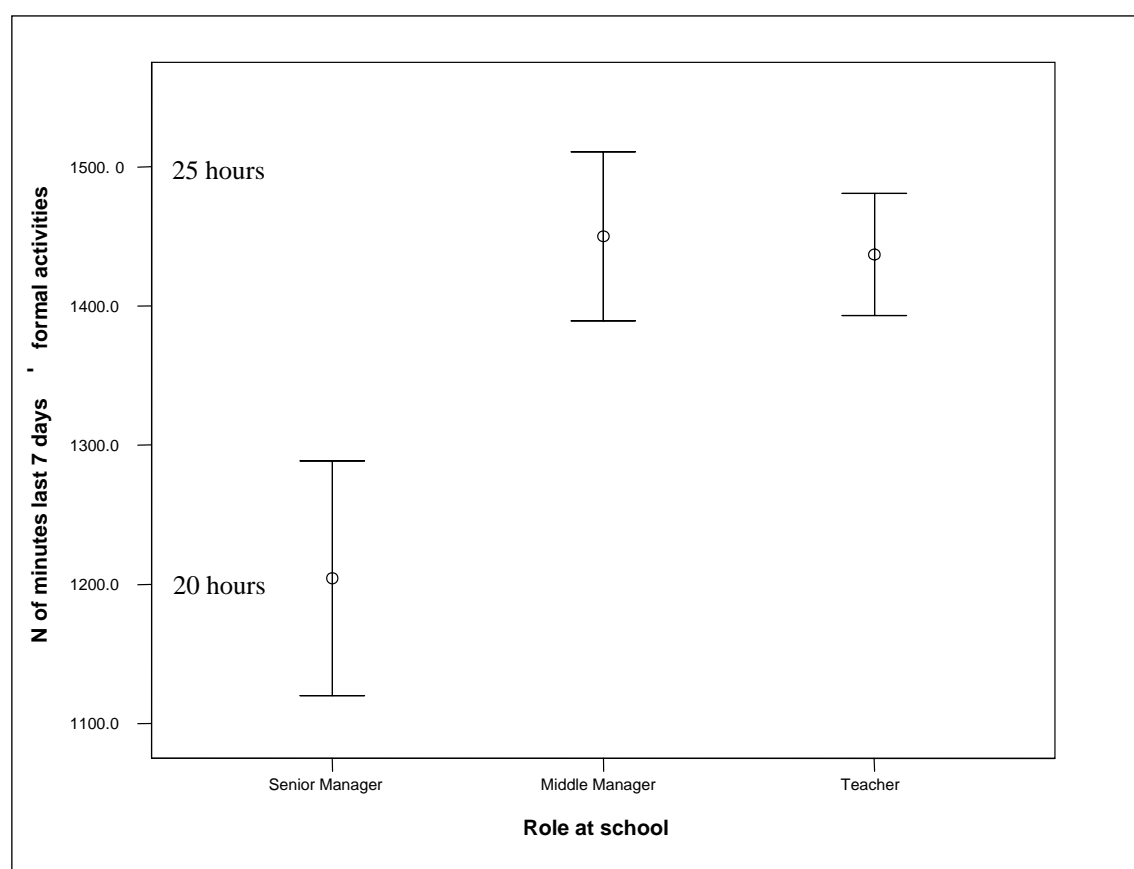
**Figure 1 Average number of hours worked over the last seven days for senior managers, middle managers and teachers, showing 95% confidence intervals**



Figure 2 shows the mean number of minutes spent on formally scheduled activities<sup>2</sup> over the last seven days for senior managers, middle managers and teachers. It can be seen that teachers and middle managers spend, on average, more time than senior managers on these activities. That is, they spend more time, on average, in the classroom.

Specifically, Figure 2 shows:

- Senior managers spent an average of 1204 minutes (SD = 708) or just over 20 hours in the previous seven days on formally scheduled activities.
- Middle managers worked an average of 1450 minutes (SD = 778) or just over 24 hours in the previous seven days on formally scheduled activities.
- Teachers worked an average of 1436 minutes (SD = 750) or just over 24 hours in the previous seven days on formally scheduled activities.



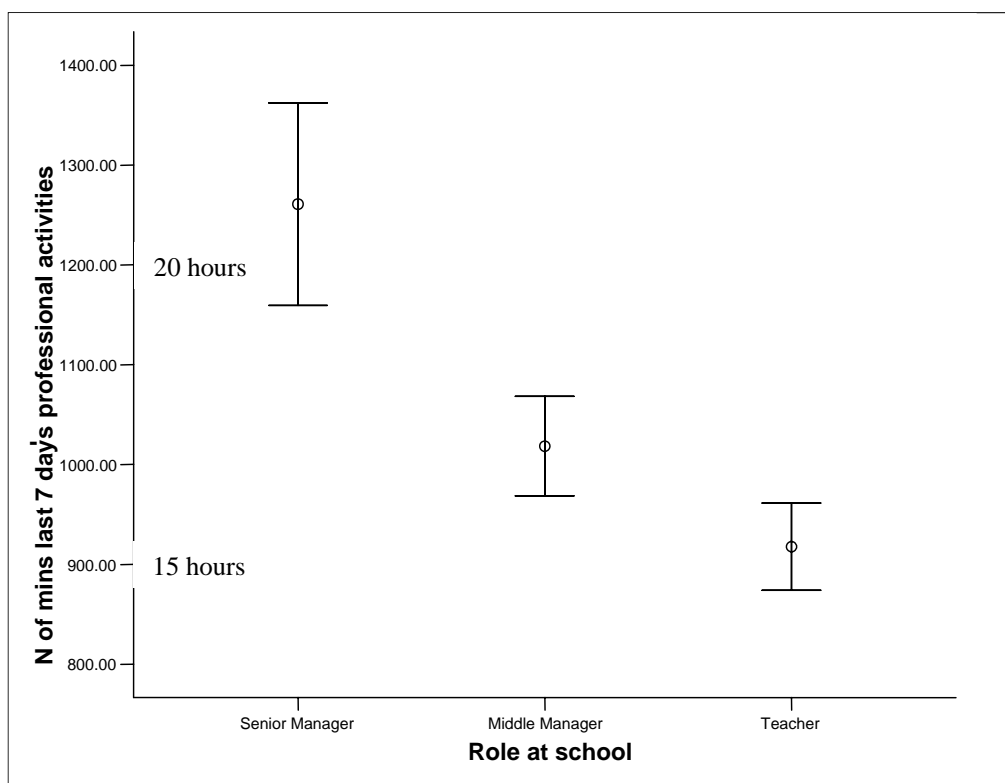
**Figure 2 Average number of minutes spent on formally scheduled activities over the last seven days for senior managers, middle managers and teachers, showing 95% confidence intervals**

<sup>2</sup> Formally scheduled activities include:

- Formally timetabled subject classes
- Relief periods
- School ground duty
- Meetings
- Extra curricular activities (*Extracurricular work involves teaching or supervising students who volunteer for activities outside of normal timetabled lessons.*)
- Student assemblies (including form assemblies, religious observance)

Figure 3 shows the average number of minutes spent on professional activities<sup>3</sup> outside of the classroom over the last seven days for senior managers, middle managers and teachers. It can be seen that senior managers spend, on average, more time on these activities than middle managers, and middle managers spend more time than teachers. Specifically, Figure 3 shows:

- Senior managers spent an average of 1260 minutes (SD = 851) or 21 hours in the previous seven days on professional activities.
- Middle managers worked an average of 1018 minutes (SD = 639) or just under 17 hours in the previous seven days on professional activities.
- Teachers worked an average of 918 minutes (SD = 741) or just over 15 hours in the previous seven days.



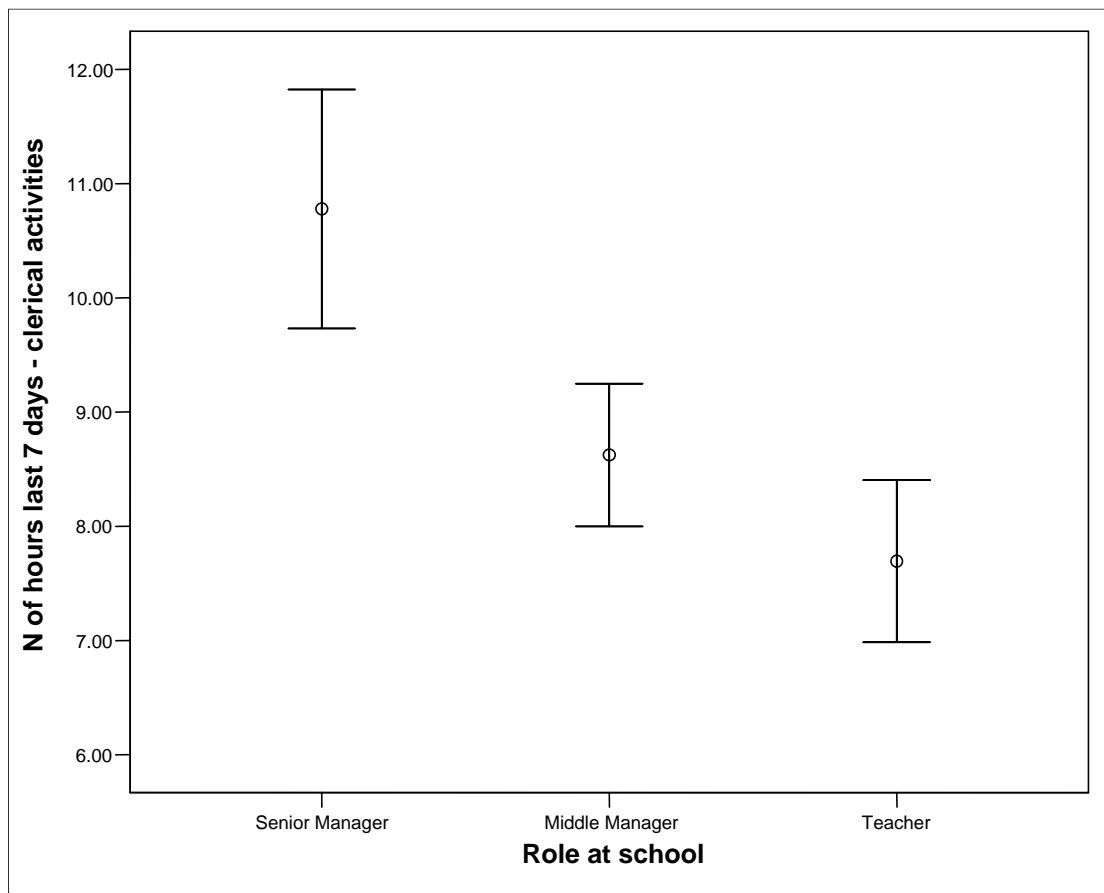
**Figure 3 Average number of minutes spent on professional activities outside of the classroom over the last seven days for senior managers, middle managers and teachers, showing 95% confidence intervals**

<sup>3</sup> Professional activities include:

- Internal moderation
- Performance review
- Provision of advice or guidance to staff
- Preparation (*excluding time spent on NCEA work.*)
- Marking (*excluding time spent on NCEA work.*)
- Formal preparation and assessment for the NCEA
- Analysing student performance data
- Professional development
- Dealing with student behaviour or pastoral issues
- Communication with parents or guardians
- Other activities

Figure 4 shows the average number of hours spent on clerical activities over the last seven days for senior managers, middle managers and teachers. There is no statistically significant difference between middle managers and teachers, but senior managers do spend, on average, more time on clerical activities than either middle managers or teachers. Specifically, Figure 4 shows:

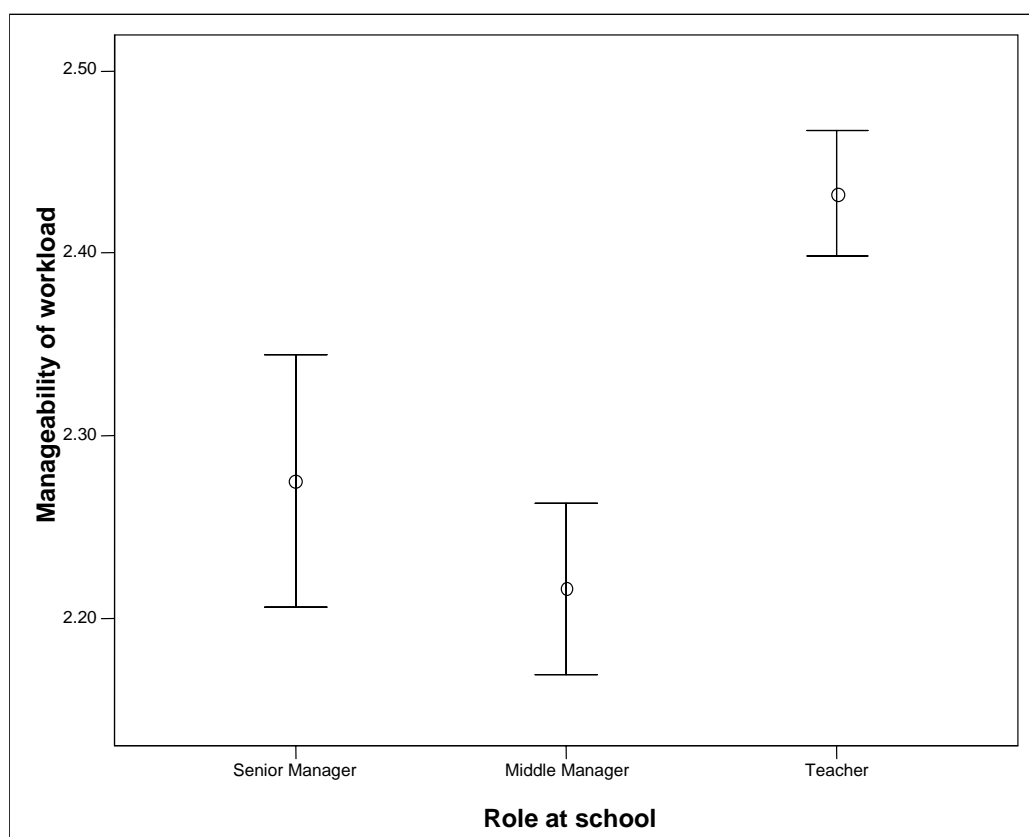
- Senior managers spent an average of 10.8 hours (SD = 8.8) in the previous seven days on clerical activities.
- Middle managers worked an average of 8.6 hours (SD = 8.0) in the previous seven days on clerical activities.
- Teachers worked an average of 7.7 hours (SD = 12.0) in the previous seven days on clerical activities.



**Figure 4 Average number of hours spent on clerical activities over the last seven days for senior managers, middle managers and teachers, showing 95% confidence intervals**

Figure 5 shows the average level of perceived manageability<sup>4</sup> of the workload for managers, middle managers and teachers. In this figure, the higher the score, the more manageable the workload is perceived to be.<sup>5</sup> That is, unlike the previous workload data, a high score implies a ‘better’ situation or outcome for the respondents. It can be seen that there is no statistically significant difference between senior and middle managers, but that teachers, on average, perceive their workload to be more manageable than the senior and middle managers. Specifically, Figure 5 shows:

- Senior managers had an average manageability score of 2.27 (SD = 0.57).
- Middle managers had an average manageability score of 2.22 (SD = 0.59)
- Teachers had an average manageability score of 2.43 (SD = 0.57).



**Figure 5 Average level of manageability of the workload for managers, middle managers and teachers, showing 95% confidence intervals (the higher the score the more manageable the workload)**

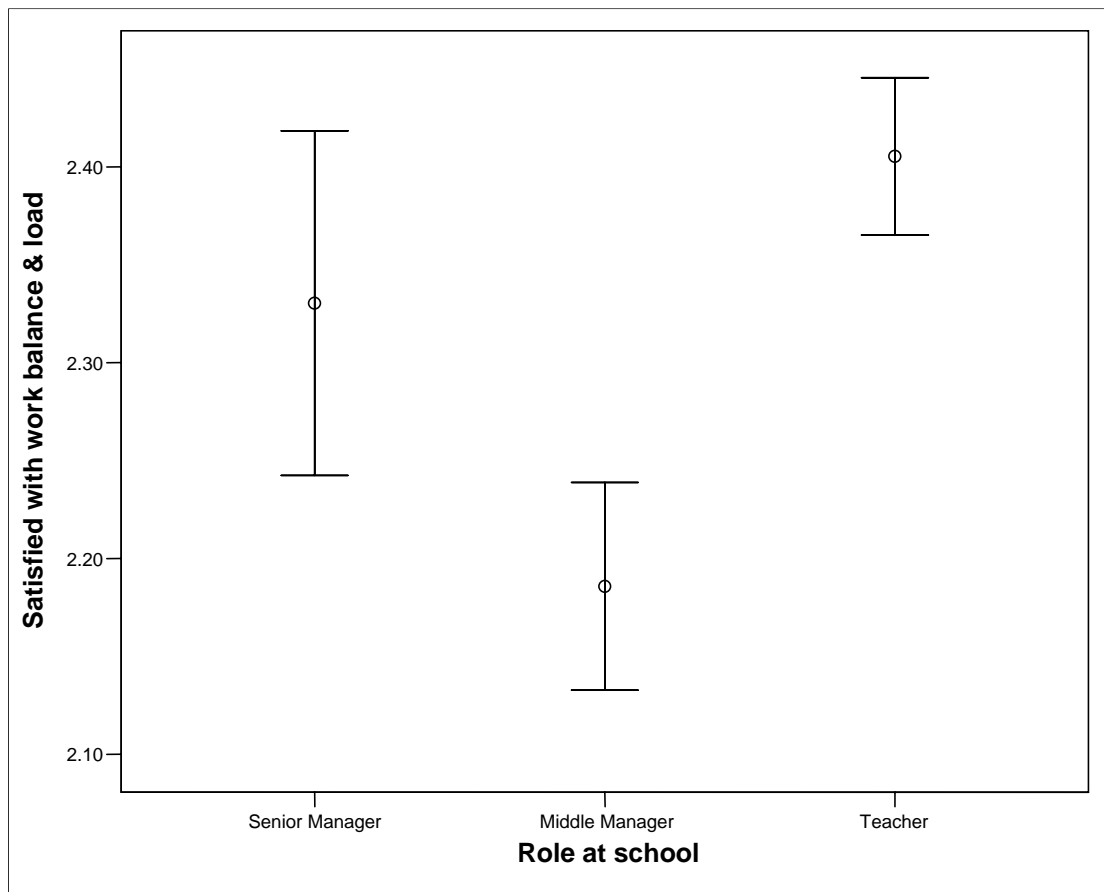
<sup>4</sup> The perceived manageability of the workload was made up of the following items, which asked the respondent to indicate to what extent they agreed with each of them:

- My workload is manageable.
- I have a good balance between home and work.
- My workload at school does not affect the quality of my teaching.
- My workload is manageable except for short periods during the year.
- I can do all I need to do within a reasonable time.

<sup>5</sup> Substantively a score of 2 is equivalent to the respondent saying “I disagree that my workload is manageable” and a score of 3 is equivalent to the statement “I agree that my workload is manageable.”

Figure 6 shows the average level of satisfaction with workload and work private life balance for senior managers, middle managers and teachers.<sup>6</sup> There is no statistically significant difference between teachers and senior managers. Both groups are more satisfied, on average, than middle managers. Specifically, Figure 5 shows:

- Senior managers had an average satisfaction score of 2.33 (SD = 0.75).
- Middle managers had an average satisfaction score of 2.19 (SD = 0.68)
- Teachers had an average satisfaction score of 2.41 (SD = 0.68).



**Figure 6 Average level of satisfaction with workload and work-private life balance for senior managers, middle managers and teachers, showing 95% confidence intervals (the higher the score the more satisfied)**

<sup>6</sup> Substantively a score of 2 is equivalent to the respondent indicating that they were “Dissatisfied” and a score of 3 is equivalent to the respondent indicating that they were “Satisfied”.

Table 2 is a summary table, which shows the mean scores on the six dependent workload variables contrasting senior managers, middle managers and teachers as well as the overall average.

**Table 2 Mean scores on workload variables contrasting senior manager, middle managers and teachers**

Role at school		Hours work last 7 days	N of hours last 7 days - formal activities	N of hours last 7 days – prof. activities
Senior Manager	Mean	59.17	20.07	21.01
	Std. Deviation	12.048	11.79932	14.18845
	N	277	273	273
Middle Manager	Mean	52.64	24.17	16.97
	Std. Deviation	16.165	12.97422	10.64489
	N	630	634	633
Teacher	Mean	47.10	23.95	15.30
	Std. Deviation	17.782	12.49784	12.35116
	N	1062	1120	1109
Total	Mean	50.57	23.49	16.60
	Std. Deviation	17.106	12.62494	12.25940
	N	1969	2027	2015

Role at school		N of hours last 7 days - clerical activities	Manageability of workload	Satisfied with work balance & load
Senior Manager	Mean	10.78	2.28	2.33
	Std. Deviation	8.84038	.57526	.74822
	N	277	268	280
Middle Manager	Mean	8.62	2.22	2.19
	Std. Deviation	8.03903	.59314	.68252
	N	636	618	638
Teacher	Mean	7.69	2.43	2.41
	Std. Deviation	12.03187	.57396	.68461
	N	1109	1087	1120
Total	Mean	8.41	2.34	2.33
	Std. Deviation	10.55511	.58853	.69961
	N	2022	1973	2038

It can be seen in Table 2 that managers spent more time working, more time in professional activities outside the classroom, more time in clerical activities and were less satisfied with their work and private life balance than teachers. Consistent with this, teachers were more inclined to agree that their perceived workload was more manageable than the managers.

Overall, managers have a higher workload than teachers – on average managers work 54.6 hours compared with an average of 47.1 hours reported by teachers – and they are more inclined to perceive their workload to be more unmanageable than teachers.

Overall, senior managers appear to have a heavier workload than middle managers and middle managers to have a heavier workload than teachers. Senior managers

spend more time on work, more time on clerical work and more time on professional activities outside of the classroom than either middle managers or teachers. Proportionately, about 60% of senior managers' time is spent on formally scheduled time or on professional time outside of the classroom, while middle managers and teachers spend about 70% of their time on these activities. Not surprisingly, then, senior managers, on average perceive their workload as less manageable than middle managers and teachers. Middle managers, however, are less satisfied than either senior managers or teachers with their workload and the balance of this work with private life. Part-time staff are more satisfied than full-time staff and perceive their workload to be more manageable.

Figure 7 shows the Percentage of senior managers, middle managers and teachers who agreed or strongly agreed with various statements to do with their workload. It can be seen, for example, that 44% of middle managers thought their workload was manageable (hence, 56% thought it unmanageable); 37% have good balance between home and work (and so 63 % do not). Just on 84 % of middle managers felt their workload was heavy; and 71% felt they could not do what they needed to do in a reasonable time.

Around 52% of teachers felt their workload was manageable (and so 52% reported it as unmanageable), and 43% saw themselves as having a good balance between home and work (and hence 57 % of teachers did not). Around 75 % of teachers felt their workload was heavy; and 73% felt they could not do what they needed to do in a reasonable time;

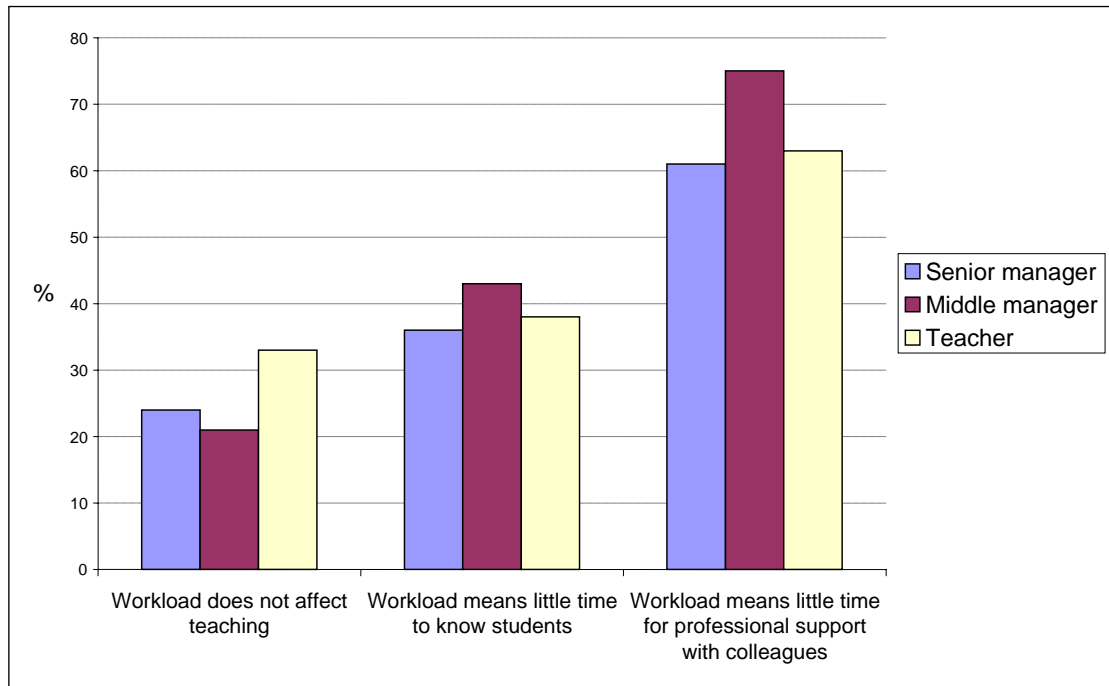


**Figure 7 Percentage of senior managers, middle managers and teachers who agreed or strongly agreed with various statements to do with their workload**

Figure 8 shows the percentage of senior managers, middle managers and teachers who agreed or strongly agreed with various statements to do with how workload affected aspects of their work as teachers. It can be seen that 77% of managers felt their

workload was affecting the quality of their teaching, 40% felt they have little time to get to know their student well and 70% felt they had no time to provide professional support to colleagues.

Some 71% of the teachers felt their workload was affecting the quality of their teaching, 39% felt they have little time to get to know their students well; and 66% felt they have little time to provide professional support to colleagues.



**Figure 8 Percentage of senior managers, middle managers and teachers who agreed or strongly agreed with various statements to do with how workload affected aspects of their work as teachers**





**Figure 9 Percentage of senior managers, middle managers and teachers who agreed or strongly agreed with various statements to do with how workload is influencing plans to continue in teaching and affecting health**

Figure 9 shows that: 23% of Middle Managers were thinking of leaving their school because of the workload; 27% were thinking of leaving teaching because of the workload; and 47% felt their workload was adversely affecting their health.

Figure 9 also shows that: 21% of teachers were thinking of leaving their school because of the workload; 28% were thinking of leaving teaching because of the workload; and 43% felt their workload was adversely affecting their health.

## Relations in the data

This section of the report describes bi-variate relations that may provide assistance in policy development and go some way towards understanding the workload and the perceived manageability of the workload of teachers, middle managers and senior managers in New Zealand secondary schools. Contrasts were made between:

- Managers (as a group, and with senior and middle managers separated) and teachers
- Area schools and other schools
- Schools in different geographic locations
- Different types of schools
- Schools governed under different authorities
- Schools with different deciles of socio-economic status
- Single sex and co-educational schools

- Males and females (Q1<sup>7</sup> in the teacher questionnaire)
- Subject areas taught (Q11 in the teacher questionnaire)
- Whether a dedicated workspace is satisfactory or not (Qs9 and 10 in the teacher questionnaire)
- Level of activity associated with the NCEA (Q15l in the teacher questionnaire)

Associations were also investigated using:

- Years of teaching (Qs5 and 6 in the teacher questionnaire), including whether the teacher was a new teacher or not
- Proportion of teaching time at the senior year levels (Q12a in the teacher questionnaire)
- The number of students taught in the previous term (Q12b in the teacher questionnaire)
- The number of hours taught in the previous term (Q12c in the teacher questionnaire)
- A range of stressors associated with teaching in a school (Q26 in the teacher questionnaire).

The dependent variables in the analyses that follow are:

- The number of hours spent on all job related activities over the last seven days (Q13 in the teacher questionnaire)
- The number of minutes spent in formally scheduled activities over the last seven days (Q15a to c in the teacher questionnaire)
- The number of minutes spent in professional activities outside of the classroom over the last seven days (Q15g to q in the teacher questionnaire)
- The number of minutes spent in clerical activities over the last seven days (Q16a to m, Q16p to u in the teacher questionnaire)
- The manageability of the workload (Q17a to d and Q17f in the teacher questionnaire)
- Satisfaction with the workload and the balance between private life and work (Q25a and d).

Associations between the dependent variables are described in Appendix 7. Overall, the correlations between the dependent variables are weak with little evidence of differences between senior managers, middle managers and teachers. The low correlations suggest examination of each of these dependent variables is warranted.

### **School size**

School size, overall, does not appear to be strongly associated with actual or perceived workload for either senior managers, middle managers or teachers. (See Appendix 7 for more detail.)

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<sup>7</sup> The question numbers for the equivalent questions in the Manager questionnaire are not provided here to improve readability. If required, the question numbers can be identified by reference to Appendix 2.

## **Area schools versus other schools**

There were few differences between Area and other schools. Senior managers in Area schools spend more time on formally scheduled classroom activities than in other schools.

## **Schools in different geographic locations**

There were no statistically significant differences between different geographical areas on each of the six dependent workload variables when responses from teachers and managers were pooled. (These areas were defined using MOE categories: 'Main urban' – localities of more than 30,000 people, 'Secondary urban' – 10,000-30,000 people, 'Minor urban' – 1,000-9,999 and 'Rural' – less than 1,000.)

Further analyses were conducted to investigate the extent to which geographic location may affect the workload of managers compared with teachers. It was found that managers in Main urban schools reported more time, on average, on professional activities outside of the classroom and more time doing clerical activities, than teachers in these schools. There were no statistically significant differences in the other locations between middle managers and teachers.

Generally, senior managers in Main urban schools appear to have a heavier workload *relative to other staff* in these schools. In contrast, in other areas, the difference between senior managers and other staff seems less marked, with few statistically significant differences being observed. Senior managers spend more time, on average, on clerical activities than senior managers in rural schools. More detail can be found in Appendix 7. Note these differences may be due to school size.

## **Different types of school**

For the investigation of differences between types of school, the Correspondence school was omitted.<sup>8</sup> When the data from managers and teachers were pooled, there were no statistically significant differences between school types found for any of the workload variables. Other analyses indicated that overall, the type of school appears to have limited effect on the workload and perceptions of workload of managers and teachers. (See Appendix 7 for more detail.)

## **Authority**

There were no statistically significant differences between schools based upon the authority governing them – private, state, and state integrated – on each of the six dependent workload variables when the data from managers and teachers was pooled. When contrasting managers and teachers within each of these groups of schools, a number of small differences in workload were observed, although typically, they were not pronounced. (See Appendix 7 for more detail.)

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<sup>8</sup> The Correspondence school was omitted because it is unique to its category of type – there is only one correspondence school in New Zealand. Under this condition the calculation of confidence intervals is meaningless.

### **Schools with different deciles of socio-economic status**

There were no statistically significant differences between schools based upon their decile level on each of the six dependent workload variables. Nor were there any patterns in the means suggesting a tendency to more or less work or greater or less levels of perceived manageability of the workload according to the decile of the school. The means were distributed fairly erratically across the deciles. In other words, the school's decile does not appear to be associated with variation in levels of actual or perceived workload. (See Appendix 7 for more detail.)

### **Co-educational and single-sex schools**

There were no statistically significant differences between single-sex and co-educational schools on each of the six dependent workload variables with responses from teachers and managers pooled. Nor were there any differences observed between these types of schools and the workload of managers and teachers. In all instances, the workload of managers relative to the workload of teachers did not vary between co-educational and single-sex schools.

There were insufficient numbers of senior managers from single sex schools to examine differences between them and middle managers, or differences between them and teachers.

### **Ethnicity**

There were no statistically significant differences in actual or perceived workload between different ethnicities. There were insufficient numbers of Maori, Pacific Islander or Asian senior managers or middle managers to warrant examination of interaction effects of ethnicity with workload.

### **Males and females**

Gender does not appear to influence workload except that females report a slightly higher level of dissatisfaction with the balance between work and private life. (See Appendix 7 for more detail.)

### **Subject areas taught**

There was little evidence that the area of teaching, apart from Physical Education or Health (where workload was a little less), affects workload or perceptions of workload. (See Appendix 7 for more detail.)

### **Years of teaching**

Teachers and managers were asked how many years they had been teaching in New Zealand. It was found that there was a weak tendency for teachers and managers to take on increasing workloads as their levels of experience grow (correlations of around 0.1 were typical). (See Appendix 7 for more detail.)

### Proportion of teaching time at the senior year levels

There were weak correlations between the six workload variables and the proportion of time spent teaching senior year levels. (All were around or less than 0.1.) The amount of time spent teaching senior students appears to be only weakly associated with a change in actual or perceived workloads. There was no evidence of differences between managers and teachers on this variable.

### The number of hours taught in the previous term

There were no statistically significant correlations between the six workload variables and the number of hours spent teaching the previous term. A separate investigation of managers and teachers indicated that managers with more hours the previous term reported more hours clerical work the previous seven days ( $r = 0.11$ ) compared with teachers where this correlation was not statistically significant.

### New teachers

Of all teachers, 28.1% were new teachers (that is, had been teaching for 3 years or less). There were statistically significant differences between new and other teachers in the perceived manageability of their workload and their satisfaction with the balance of their work with their private life and workload. On both variables, the new teachers, on average, scored higher. They perceived their workload as more manageable Figure 10 and were more satisfied (see Figure 11). Table 3 shows the data upon which Figure 10 and Figure 11 are based.

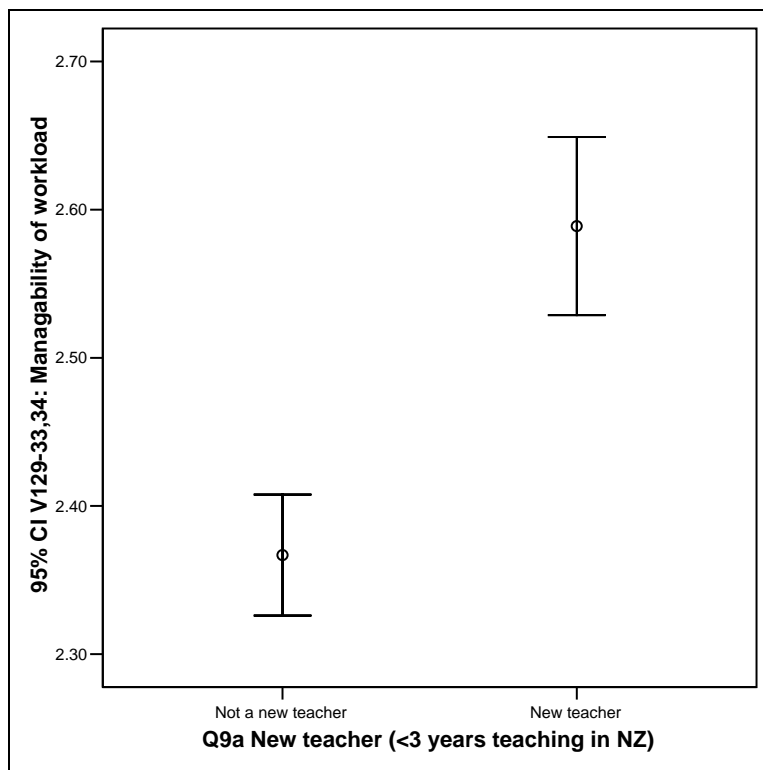
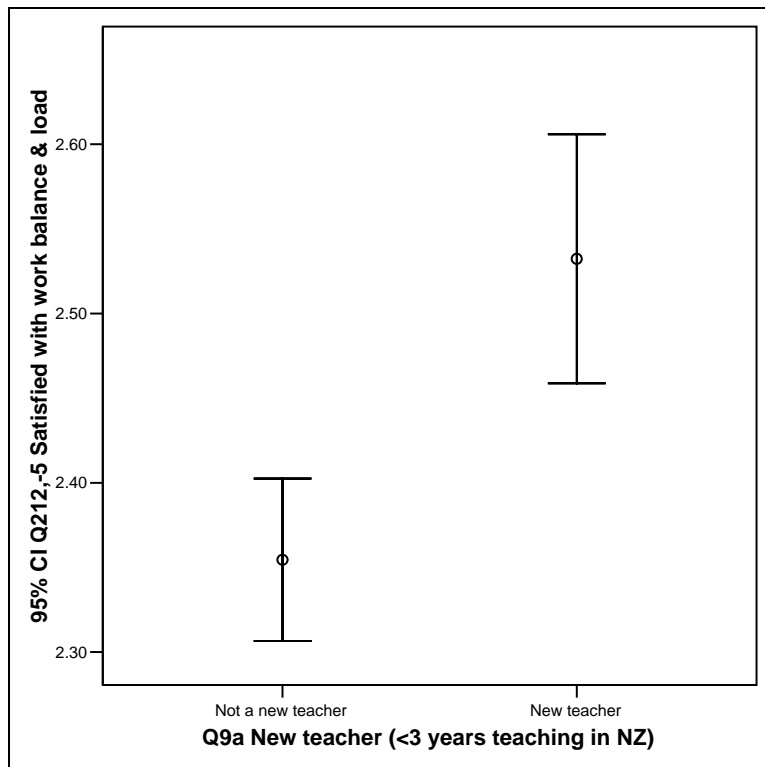


Figure 10 Perceived manageability of workload contrasting new teachers with others



**Figure 11 Satisfaction with work and private life balance and workload contrasting new teachers with other**

**Table 3 Average levels of perceived manageability of workload, and levels of satisfaction with work and private life balance and workload contrasting new teachers with others**

		Manageability of workload	Satisfied with work balance & load
Not a new teacher	Mean	2.3669	2.3546
	N	773	801
	Std. Deviation	.57831	.69129
New teacher	Mean	2.5889	2.5323
	N	305	310
	Std. Deviation	.53337	.65773
Total	Mean	2.4297	2.4041
	N	1078	1111
	Std. Deviation	.57449	.68645

### Dedicated workspace

Teachers and managers were asked if they had a workspace and if so, was it satisfactory. For the analyses reported here, those with a satisfactory workspace were contrasted with those who either had none or who had an unsatisfactory workspace. As Table 4 shows, those who have a satisfactory workplace reported less time engaged in formal activities over the previous seven days, but more time on clerical work. Those with a satisfactory workspace perceive their workload to be more manageable than those without such a workspace.

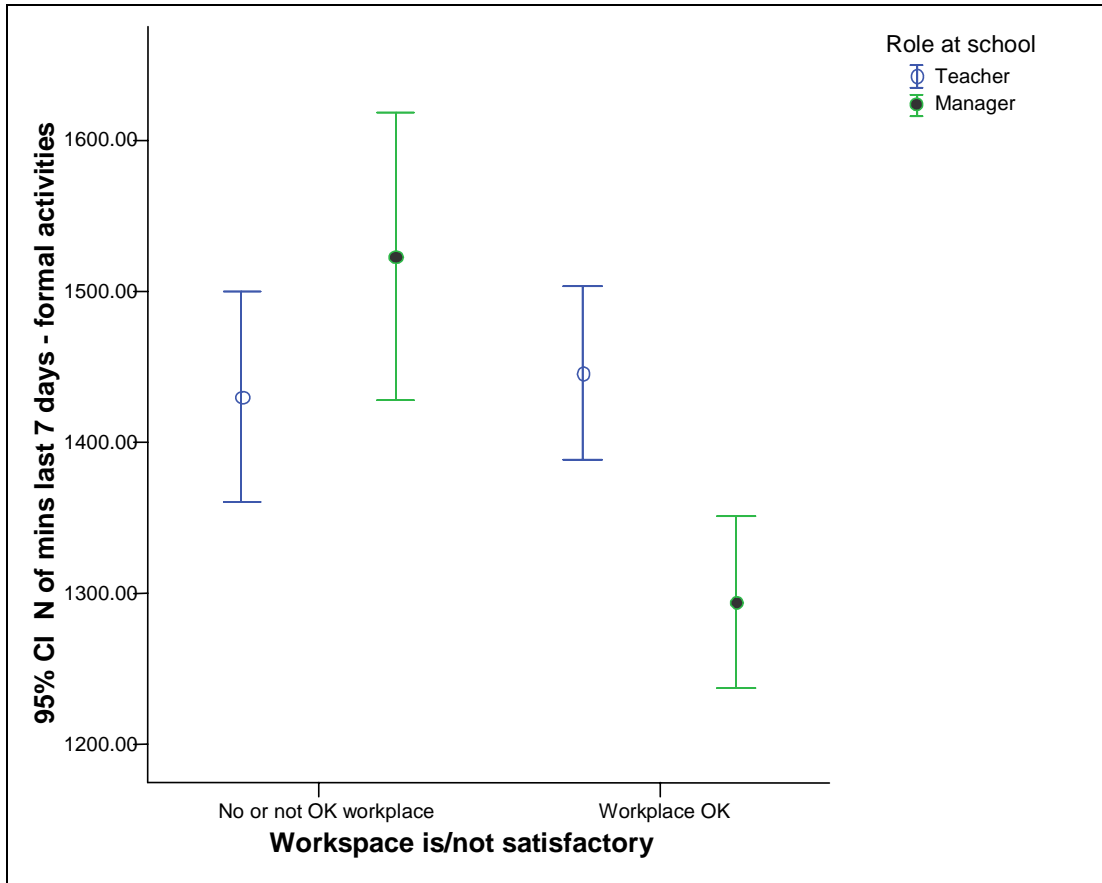
**Table 4 Mean scores on workload variables contrasting those having a satisfactory workspace and those who do not**

Workspace is/not satisfactory		Number of hours work last 7 days	N of hours last 7 days - formal activities	N of hours last 7 days - professional activities
No or not OK workplace	Mean	51.19	<b>24.45</b>	17.34
	N	682	700	700
	Std. Deviation	17.897	12.74907	12.49294
Workplace OK	Mean	50.35	<b>22.93</b>	16.31
	N	1260	1294	1282
	Std. Deviation	16.729	12.41277	12.20950
Total	Mean	50.64	23.48	16.68
	N	1942	1994	1982
	Std. Deviation	17.148	12.55082	12.31707

Workspace is/not satisfactory		N of hours last 7 days - clerical activities	Perceived manageability of the workload	Satisfied with work balance & load
No or not OK workplace	Mean	8.9248	<b>2.1953</b>	<b>2.1622</b>
	N	700	686	712
	Std. Deviation	11.45484	.59091	.68386
Workplace OK	Mean	8.1334	<b>2.4272</b>	<b>2.4181</b>
	N	1291	1257	1294
	Std. Deviation	10.09771	.57139	.69431
Total	Mean	8.4116	2.3453	2.3273
	N	1991	1943	2006
	Std. Deviation	10.59856	.58874	.70123

Further analyses were conducted to investigate whether there were differences in workload associated with the workspace and whether the respondent was a teacher or manager. There were only differences found that were attributable to the respondent's role as a teacher or manager was the amount of time spent on formal activities. In this case, managers with a satisfactory workspace reported less time on formal activities than teachers with a satisfactory workspace, compared with managers without a satisfactory workspace who spent about the same time as teachers on formal activities. This can be seen in Figure 12.



**Figure 12 Mean number of minutes over the previous seven days on formally scheduled activities, contrasting managers and teachers, showing 95% confidence intervals**



## Stressor and workload

Teachers and managers were asked to indicate how stressful 26 different aspects of their work were for them. Table 5 shows the correlations between these stressors and the six workload variables.

To read this table, the first figure to examine is the '*r*' value – a measure of the strength of the association between the variable appearing in the column heading and the variable appearing in the row. This value ranges from -1 through zero to +1. The closer the value is to -1 or +1 the stronger the relationship between the two variables. A correlation of +1 means that as one variable increases in value by a unit, so the other also increases by a unit. A zero correlation means that there is no association between the two variables. Knowing about how one changes tells you nothing about how the other changes. As a rule of thumb values of *r* up to 0.15 can be treated as inconsequential, 0.15 to 0.3 as weak, from 0.3 to 0.5 as moderately strong, and 0.7 and above as strong.

Once the size of the *r* value has been established, the next task is to look to see if the correlation is statistically significant. By convention a value less than 0.05 is said to be statistically significant. Where the *r* is statistically significant, it is likely that the correlation between the two variables is real, that is, to be found in the population of teachers or managers.

In this table a 'two-tailed' test is used. This means that no direction has been hypothesised about the relationship between the variables, that is, we are not hypothesising that as hours worked, for example, so paperwork increases. We are holding open the possibility that there could be a decrease.

Consider the correlation between the number of hours worked and the amount of paper work is 0.06 – a very weak association. Note, however, that this is statistically significant, so it is likely to be real. This result allows the finding to be made that as the amount of paper work increases so there tends to be a very small increase in the number of hours worked, or conversely and equally the case, as the number of hours of work increases, so also does the amount of paper work.

**Table 5 Correlations of stressors with each of the six workload variables (shaded areas showing  $r \geq 0.15$  or  $\leq -0.15$ )**

		Hours work last 7 days	N of mins last 7 days - formal activities	N of mins last 7 days professional activities	N of mins last 7 days - clerical activities	Perceived manage- ability of the workload	Satisfied with work balance & load
Amount of paperwork	<i>r</i>	0.06	0.05	0.04	0.07	-0.41	-0.39
	Sig*	0.01	0.04	0.06	0.00	0.00	0.00
	N	1942	2001	1990	1998	1951	2015
Type of paperwork	<i>r</i>	0.04	0.06	0.02	0.06	-0.34	-0.34
	Sig.	0.05	0.01	0.33	0.01	0.00	0.00
	N	1925	1982	1971	1979	1932	1997
Hours at school	<i>r</i>	0.18	0.05	0.14	0.12	-0.52	-0.57
	Sig.	0.00	0.04	0.00	0.00	0.00	0.00
	N	1928	1987	1976	1984	1937	2002
Accountability reviews	<i>r</i>	0.00	0.02	0.01	0.00	-0.18	-0.16
	Sig.	0.90	0.44	0.70	0.90	0.00	0.00
	N	1843	1894	1884	1893	1848	1908
New assessment procedures	<i>r</i>	-0.03	0.05	0.00	0.00	-0.26	-0.23
	Sig.	0.16	0.02	0.83	0.99	0.00	0.00
	N	1892	1949	1937	1945	1906	1964
New curriculum	<i>r</i>	-0.01	0.05	0.00	0.03	-0.25	-0.20
	Sig.	0.67	0.04	0.91	0.22	0.00	0.00
	N	1838	1893	1882	1892	1851	1907
How change is implemented at school	<i>r</i>	0.00	0.04	0.00	0.02	-0.26	-0.26
	Sig.	0.96	0.07	0.97	0.27	0.00	0.00
	N	1909	1968	1957	1966	1917	1983
Financial resources	<i>r</i>	0.05	0.05	0.04	0.06	-0.27	-0.26
	Sig.	0.04	0.02	0.05	0.01	0.00	0.00
	N	1888	1948	1937	1945	1901	1962
Interruptions to teaching	<i>r</i>	0.03	0.04	0.04	0.01	-0.26	-0.28
	Sig.	0.18	0.05	0.07	0.68	0.00	0.00
	N	1926	1985	1974	1982	1939	1998
Student behavior	<i>r</i>	-0.08	0.03	-0.01	-0.01	-0.15	-0.15
	Sig.	0.00	0.15	0.71	0.57	0.00	0.00
	N	1934	1993	1983	1989	1942	2007
Relations with parents	<i>r</i>	0.01	0.03	0.04	0.02	-0.15	-0.15
	Sig.	0.58	0.19	0.05	0.41	0.00	0.00
	N	1923	1980	1970	1977	1931	1993
Class sizes	<i>r</i>	-0.02	0.04	-0.01	0.02	-0.22	-0.20
	Sig.	0.48	0.07	0.53	0.43	0.00	0.00
	N	1905	1961	1951	1958	1918	1977

		Hours work last 7 days	N of mins last 7 days - formal activities	N of mins last 7 days professional activities	N of mins last 7 days - clerical activities	Perceived manage- ability of the workload	Satisfied with work balance & load
Amount of non- contact time	<i>r</i>	0.07	0.04	0.06	0.04	-0.47	-0.44
	Sig.	0.00	0.05	0.01	0.06	0.00	0.00
	N	1890	1944	1936	1940	1902	1959
Collation etc of assessment data	<i>r</i>	0.02	0.07	0.04	0.08	-0.30	-0.31
	Sig.	0.36	0.00	0.10	0.00	0.00	0.00
	N	1915	1974	1963	1971	1930	1988
Number of support staff	<i>r</i>	0.06	0.06	0.04	0.04	-0.33	-0.30
	Sig.	0.01	0.01	0.12	0.07	0.00	0.00
	N	1822	1872	1863	1867	1826	1888
Performance appraisal	<i>r</i>	0.02	0.02	0.00	0.05	-0.20	-0.22
	Sig.	0.31	0.39	0.93	0.04	0.00	0.00
	N	1922	1979	1968	1976	1929	1996
Reporting requirements	<i>r</i>	0.04	0.08	0.02	0.04	-0.28	-0.30
	Sig.	0.12	0.00	0.45	0.04	0.00	0.00
	N	1938	1997	1986	1994	1949	2013
Level of resourcing	<i>r</i>	0.07	0.04	0.05	0.07	-0.31	-0.30
	Sig.	0.00	0.07	0.02	0.00	0.00	0.00
	N	1927	1987	1977	1984	1939	2004
Dealing with outside agencies	<i>r</i>	0.05	0.00	0.07	0.08	-0.20	-0.18
	Sig.	0.04	0.95	0.00	0.00	0.00	0.00
	N	1647	1692	1684	1694	1652	1709
Relations with other teachers	<i>r</i>	0.05	-0.02	0.04	0.04	-0.16	-0.16
	Sig.	0.05	0.29	0.06	0.09	0.00	0.00
	N	1894	1958	1947	1951	1906	1969

*Two-tailed test of significance.*

An examination of Table 5 suggests that this set of stressors is associated with the perceptions of the manageability of the workload rather than actual workload increase. That is, while there are many statistically significant correlations between the stressor variables and actual workload – time spent working, spent on formally scheduled activities, on professional activities outside the classroom, and on clerical activities – nearly all of them are very weak. This contrasts with all of the stressor variables related to the perceived manageability of the workload and satisfaction with workload variables. The two stress factors most strongly associated with the perceived manageability of the workload are the number of hours spent at school and the amount of non-contact time. There was some evidence that the associations between workload and the stressor variables differed between managers compared with teachers. There was, for example, a slightly stronger association between time spent on clerical activities and the amount and type of paper work for teachers than for managers. For managers there was a slightly stronger association with time on

clerical activities and the level of financial resourcing. Overall, however, both managers and teachers appear to respond to stressors in similar ways.

Further analyses were conducted investigating the differences between senior managers, middle managers and teachers and the correlations between these stressors and the workload variables. The patterns were broadly the same as seen in Table 5, suggesting that there is little difference between the three groups in response to these stressors. However, the following differences were noted:

- A decrease in the number of support staff in the school was associated with an increase in workload for senior managers than for middle managers or teachers.
- Reporting requirements were associated with an increase in workload for teachers than for senior managers or middle managers.
- An increase in the amount of non-contact time was associated with an increase in workload for middle managers than for senior managers or teachers.

### **The impact of the NCEA on workload**

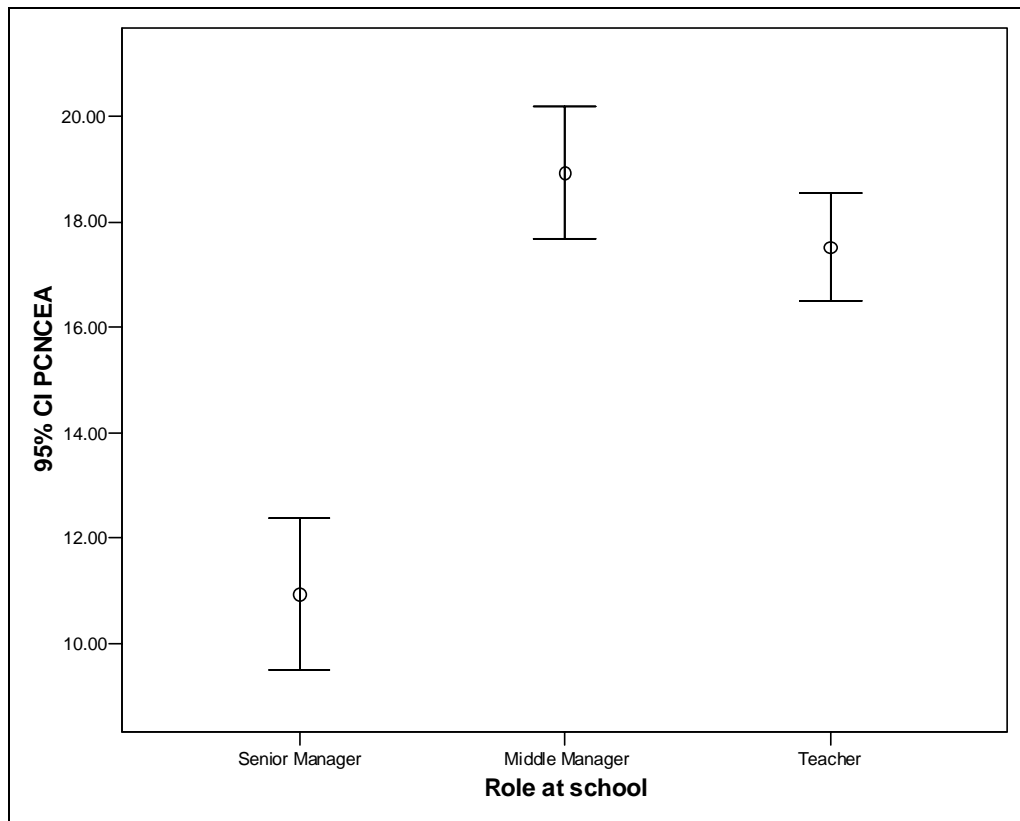
Table 6 shows the correlation of each of six workload variables with the amount of time spent in formal preparation and assessment for the NCEA, for senior managers, middle managers and teachers. It can be seen that:

- there is a weak positive association between hours worked and the amount of time spent on NCEA for senior managers and teachers, but not for middle managers
- there is a weak positive association between time spent on formally scheduled activities and the amount of time spent on NCEA for senior managers, but not for middle managers or teachers
- there is a strong positive association between time spent on the NCEA and the amount of time spent on professional activities outside of the classroom.

As the time spent on professional activities is in part constituted by the amount of time spent on the NCEA, this strong correlation suggested further investigation was warranted. Figure 13 shows the proportion of time on professional activities outside of the classroom spent on formal preparation and assessment for the NCEA contrasting senior managers, middle managers and teachers. It can be seen that there is no statistically significant difference between middle managers and teachers, but there is a statistically significant difference between them and senior managers. Senior managers spend around 10 to 12 percent of their time on professional activities on the NCEA compared with middle managers and teachers who spend around 15 to 20 percent of this time on NCEA activities.

**Table 6 Correlation of each of six workload variables with the amount of time spent in formal preparation and assessment for the NCEA, for senior managers, middle managers and teachers**

		Senior managers	Middle managers	Teachers	All staff
Hours worked last 7 days	r	<b>0.15</b>	0.06	<b>0.17</b>	<b>0.11</b>
	Sig.	0.02	0.18	0.00	0.00
	N	225	582	942	1749
Minutes on- formal activities	r	<b>0.15</b>	0.01	0.00	0.02
	Sig.	0.03	0.75	0.96	0.36
	N	230	593	1002	1825
Minutes on professional activities	r	<b>0.33</b>	<b>0.55</b>	<b>0.38</b>	<b>0.41</b>
	Sig.	0.00	0.00	0.00	0.00
	N	230	593	1004	1827
Hours on clerical activities	r	0.10	0.05	0.02	0.03
	Sig.	0.12	0.22	0.47	0.15
	N	229	590	993	1812
Manageability of workload	r	<b>-0.18</b>	-0.02	<b>-0.15</b>	<b>-0.11</b>
	Sig.	0.01	0.63	0.00	0.00
	N	218	573	966	1757
Satisfied with work balance & load	r	-0.08	-0.04	<b>-0.17</b>	<b>-0.11</b>
	Sig.	0.21	0.39	0.00	0.00
	N	228	587	986	1801



**Figure 13 Proportion of time on professional activities outside of the classroom spent on formal preparation and assessment for the NCEA contrasting senior managers, middle managers and teachers**

### Summary of findings from bi-variate analyses

Generally, the more senior the staff member, the more work was, on average undertaken in school, and the lower the level of perceived manageability was felt. Few school or system level factors appeared to be associated with variation in teacher or management workload. There were few if any differences observed between schools of different types, under different authorities, single-sex or co-educational, socio-economic decile, or school size. There was some evidence that a rural location was associated with variation in workload.

More specifically:

1. There were statistically significant differences in total hours worked per week between senior managers, middle managers and teachers, with increasing hours associated with increasing levels of responsibility in the school.
2. 48.4% of senior managers, 42.9% of middle managers and 57.2% of teachers agreed or strongly agreed that their work was manageable. It can thus be seen that relatively large proportions of people in all groups did not believe that their workload was manageable. Middle managers had the most negative perceptions of the manageability of their workload.
3. Overall, managers had a significantly higher workload than teachers – on average they worked 54.6 hours compared with an average of 47.1 hours

reported by teachers. Senior managers worked 59.2 hours per week, middle managers worked 52.6 hours.

4. Only 26.1% of senior managers, 27% of middle managers and 36.1% of teachers agreed that they could do all they needed to do within a reasonable time.
5. Teachers and senior managers, overall, were more satisfied with work-life balance than middle managers. There was no statistical difference in this respect between teachers and senior managers.
6. There were stronger associations between a wide range of 'stressors' associated with teaching and teachers' perceptions of workload than with any of the variables that related to actual workload.
7. The two stressors most strongly associated with the perceived manageability of workload were the number of hours spent at school and the amount of non-contact time.
8. Between 12 to 18 per cent of the total work time of senior managers, middle managers and teachers was taken up with clerical activities. No significant differences were found between the proportions of time (in terms of total workload) spent on clerical activities for each group. Senior managers spent more actual time on clerical activities than teachers or middle managers. Overall there was no statistical difference between middle managers and teachers in the amount of actual time spent on clerical activities.
9. School size did not appear to be strongly associated with actual or perceived workload for either senior managers, middle managers or teachers. Nor did subject area taught.
10. There were few and low statistically significant differences in any of the variables on the basis of decile or single sex school. Some relatively minor differences were found between state and state integrated schools and private schools.
11. Females were less satisfied with their workload and work-life balance than males.
12. New teachers, on average, found their work more manageable and were more satisfied with their workload and life-work balance than other teachers.
13. There was a strong positive association between time spent on the NCEA and the amount of time spent on professional activities outside the classroom.

## **Multi-variate analyses – multi-level modelling**

This section of the report describes the multi-variate analyses that were conducted for the study. Multi-level modelling was used to investigate the factors that had been theorised would predict variation in actual workload and in the perceived manageability of workload.

Multi-level modelling is a variant of linear regression procedures. According to Kerlinger and Pedhazur (1973, p. 3), regression is a method for investigating "the collective and separate contribution of two or more independent variables ... to the variance of a dependent variable." It is, essentially, an elaboration of correlational studies using the product moment coefficient of correlation ( $r$ ). This coefficient, Kerlinger and Pedhazur (1973, pp. 11 and 12) argue, is an "index" of the strength and direction of relations between "sets of ordered pairs". The regression procedure provides not only information about the strength and direction of the relation, but also

indicates the proportion of the variance observed in a dependent variable that is accounted for by the independent variable(s) entered into the regression equation. This is indicated by the 'R-squared' value. Also, when there is more than one independent variable in a regression analysis, the procedure provides information about the relation between each independent variable and the dependent variable that is independent of (net of) the other independent variables in the analysis.

Multi-level modelling takes account of the context in which the staff work, which in the case of this study, is the school. When individuals (e.g. school staff) are clustered within a higher level unit (e.g. a school) those within each cluster are more likely to be similar to each other than are other individuals in the sample. Multi-level modelling provides estimates of the extent of this clustering effect and provides correct estimates of regression coefficients and tests of statistical significance when there is a significant clustering effect.

In this study, the percentage of variance at the school level was relatively modest, ranging from 0 through to around 15%. This can be seen in Table 7 which shows the percentage of variance explained at the school level for teachers, middle managers and senior managers for the perceived manageability of workload and the number of hours worked over the previous seven days. As there was only one senior manager from each school who replied, there was no school level variance available, so a zero appears in this column in Table 7. The proportion of variance at the school level for teachers and middle managers warranted the use of multi-level modelling of these data.

**Table 7 Percentage of variance explained at the school level for teachers, middle managers and senior managers for manageability of workload and hours worked**

	<b>Teachers</b>	<b>Middle Managers</b>	<b>Senior Manager</b>	<b>All</b>
Manageability of workload	13.58	11.59	0.00	10.26
Hours worked	4.94	12.06	0.00	7.43

See Appendix 8 for details of the independent variables used in the analyses reported here.



Table 8 shows the results of multi-level analyses for middle managers, senior managers and all staff in which the manageability of the workload was a dependent variable. In this table, the statistically significant co-efficients are shaded.

**Table 8 Manageability of workload for teachers, middle managers, senior managers and all staff– results of multi-level analysis with statistically significant standardised co-efficients shaded**

	Teachers	Middle Managers	Senior Manager	All
Rural location	0.079	0.021	0.184	0.079
Middle managers vs senior managers				0.084
Teachers vs senior managers				0.200
Stressors	-0.395	-0.438	-0.358	-0.404
Level of school support	0.220	0.206	0.128	0.201
Teacher autonomy	0.177	0.135	0.121	0.151
School innovation	-0.067	-0.077	-0.167	-0.085
Collaborative teaching	0.040	-0.033	0.126	0.029
School values	-0.112	0.021	-0.050	-0.051
School leadership	0.013	-0.068	0.041	-0.006
R-squared	0.321	0.321	0.251	0.319

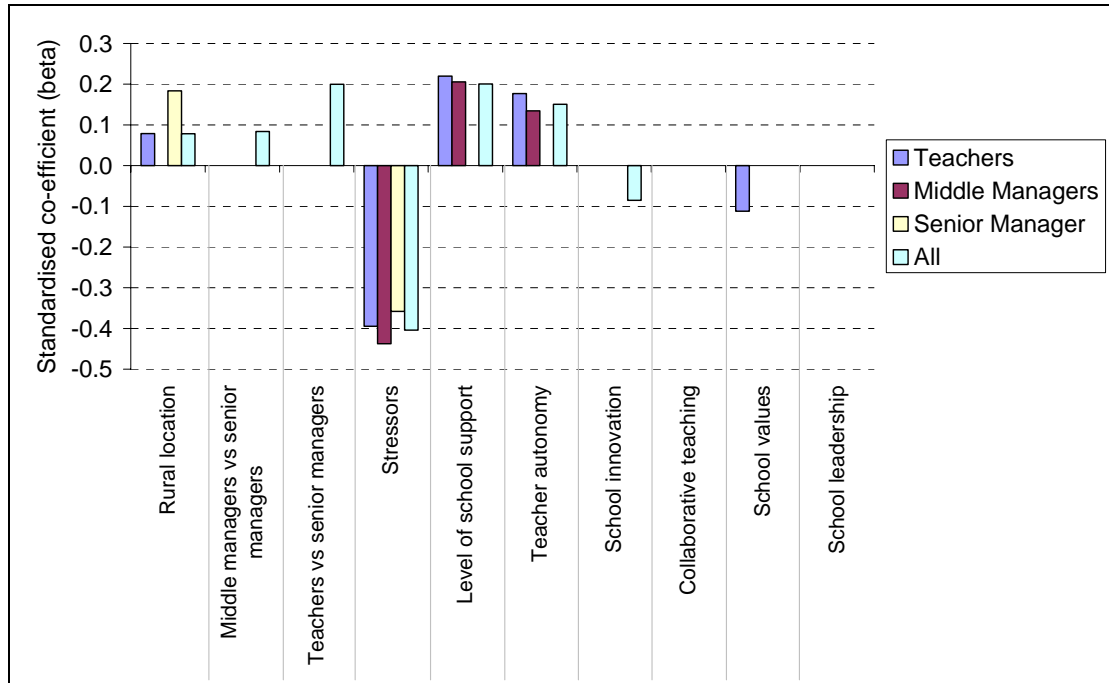
The standardised co-efficients seen in Table 8 are directly comparable with each other **down** the columns, but not across the rows.<sup>9</sup> For example, it can be seen that for all staff (last column), stressors (-0.404) are about twice the level of perceived support (0.201) in their effect on perceptions of manageability of workload. In this case, being a teacher makes workload more manageable, and stressors (with the minus sign before the co-efficient) make the workload less manageable. These co-efficients provide a measure of the unique contribution of each of these variables on manageability, and for this reason, we can be confident of claiming that, for example, the effect of stressors is twice that of being a teacher. Table 8 also shows that around 30% of the variance is being explained by this model. (This is obtained by converting the R-squared value into a percentage. For example, for teachers, the model explains 32.1% of the variance.) In the context of educational research, explaining around 30% of the variance is acceptable.

To assist in interpreting the data seen in Table 8, Figure 14 was prepared. It uses only the statistically significant co-efficients from the table. It can be seen that:

- Rural location has a weak positive effect on perceptions of manageability for teachers, senior managers and for the pooled data.

<sup>9</sup> The standard deviations of the independent and the dependent variables differ across the equations making the coefficients not directly comparable across the equations.

- Stressors had a strong negative effect on perceptions of manageability for teachers, middle managers and senior managers.
- Level of school support had a weak positive effect on perceptions of manageability for teachers and middle managers but not for senior managers (presumably, because they are the people giving the support).
- Teacher autonomy had a weak positive effect on perceptions of manageability for teachers and middle managers but not for senior managers.



**Figure 14 Manageability of workload for teachers, middle managers, senior managers and all staff – results of multi-level showing only statistically significant standardised co-efficients**

Table 9 shows the results of multi-level analyses for middle managers, senior managers and all staff in which the number of hours worked over the previous seven days was a dependent variable. In this table, the statistically significant co-efficients are shaded.

**Table 9 Number of hours worked over the previous seven days for teachers, middle managers, senior managers and all staff– results of multi-level with statistically significant standardised co-efficients shaded**

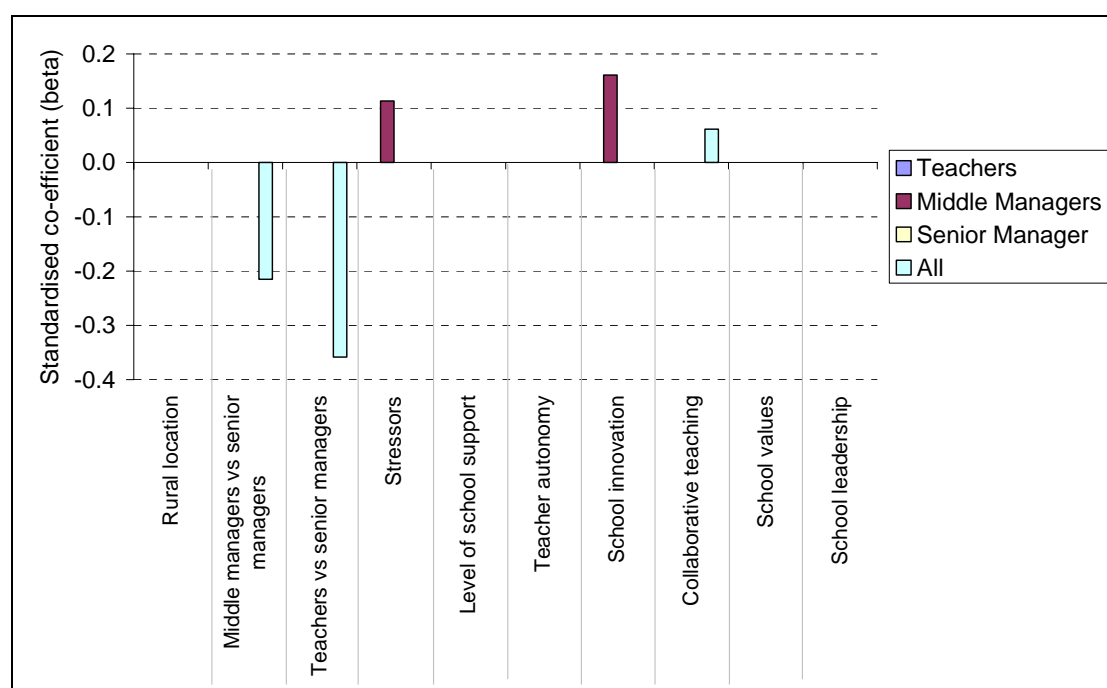
	Teachers	Middle Managers	Senior Managers	All
Rural location	0.018	-0.061	-0.052	-0.015
Middle managers vs senior managers				-0.215
Teachers vs senior managers				-0.358
Stressors	-0.041	0.114	0.148	0.021
Level of school support	-0.081	-0.018	0.034	-0.043
Teacher autonomy	-0.076	-0.024	-0.130	-0.061
School innovation	-0.034	0.161	0.002	0.025
Collaborative teaching	0.065	0.075	-0.027	0.062
School values	0.011	0.045	0.035	0.019
School leadership	0.053	-0.107	0.084	0.007
R-squared	0.013	0.043	0.040	0.062

Table 9 shows that only between 1% and 6% of the variance is being explained by this model. This suggests these variables are not very helpful for understanding variation in hours worked.

Figure 15 was prepared to assist in interpreting Table 9, and to contrast it with Figure 14, Figure 15 uses only the statistically significant co-efficients from the table.

It can be seen that:

- Very few of the variables in the model contributed to understanding hours worked, except for level of seniority in the school. Senior managers work more hours than middle managers, and middle managers work more hours than teachers.
- Stressors were associated with (1) a slight increase in work hours for middle managers, and (2) being in an innovative school.



**Figure 15 Number of hours worked over the last seven days for teachers, middle managers, senior managers and all staff – results of multi-level showing only statistically significant standardised co-efficients**

In summary, the data suggest that stressors are important factors in affecting teachers’ and managers’ perceptions of the manageability of their workload. Levels of school support and a sense of autonomy were associated with an increase in the manageability of workload. The model explained a substantial proportion of the variability of the dependent variable, and hence it suggests that these factors are important for understanding perceptions of workload manageability in schools.

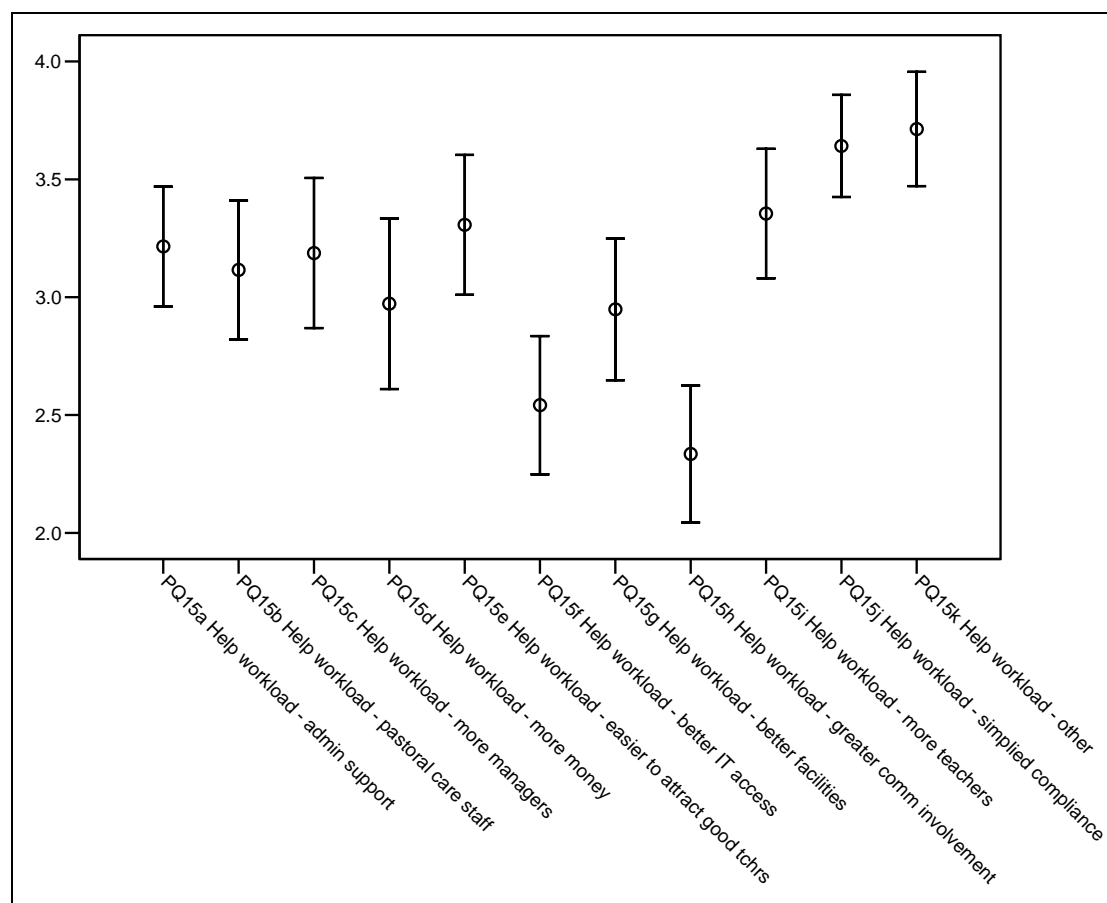
For actual hours worked, it appears as if it is the seniority of the role in the school that is important, compared with other variables investigated in this study. However, as the proportion of variance explained by this model was so low this finding is of limited value.

## How to improve workload problems in schools – principals’, managers’ and teachers’ views

This section describes what principals, managers and teachers see as solutions to workload problems in schools. Principals were asked about which factors would make workloads more manageable for: (1) themselves, (2) middle managers, (3) teachers. Managers were asked about which factors would make workloads more manageable for themselves and for teachers. Teachers were asked what would make the workload more manageable for teachers in schools.

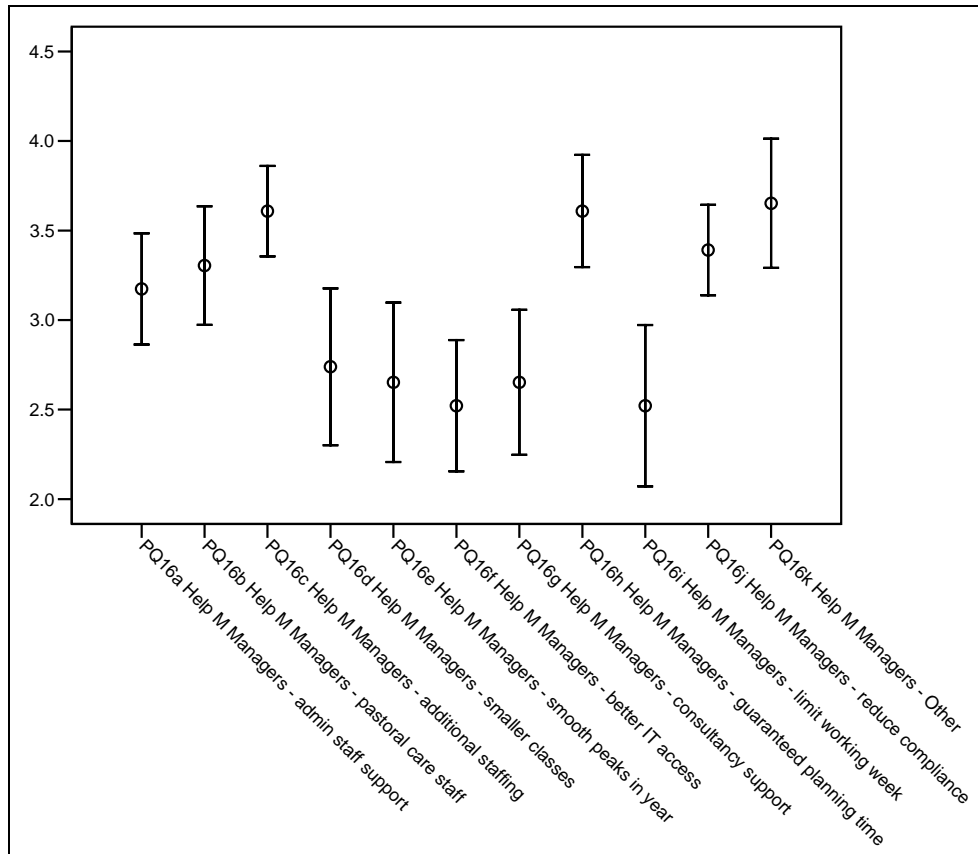
### Principals

Principals were asked to what extent a range of resources and supports might assist in making the workload of principals more manageable. Figure 16 shows the mean scores for each of these factors. It can be seen that there is considerable overlap in their responses. However, simplified compliance requirements and more teachers were among the most important, and greater community involvement and better IT access were among the least important factors identified by the principals.



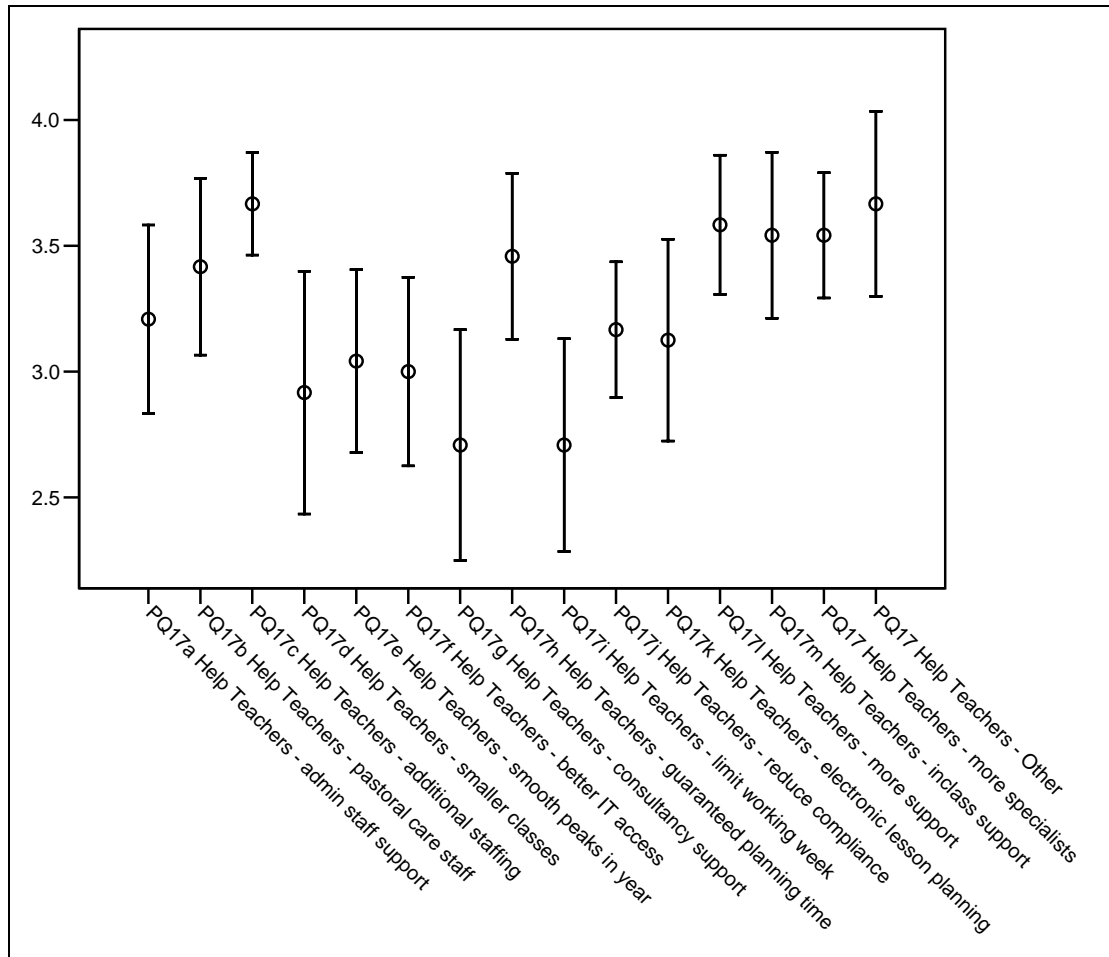
**Figure 16 Mean scores on various types of support that principals report would make principals’ workload more manageable**

Figure 17 shows the mean scores on various types of support that principals report would make managers' workload more manageable. Principals indicated that additional staff and guaranteed planning time along with reduced compliance requirements were among the most important factors, and limiting the working week, and better IT access was among the least important.



**Figure 17 Mean scores on various types of support that principals report would make managers' workload more manageable**

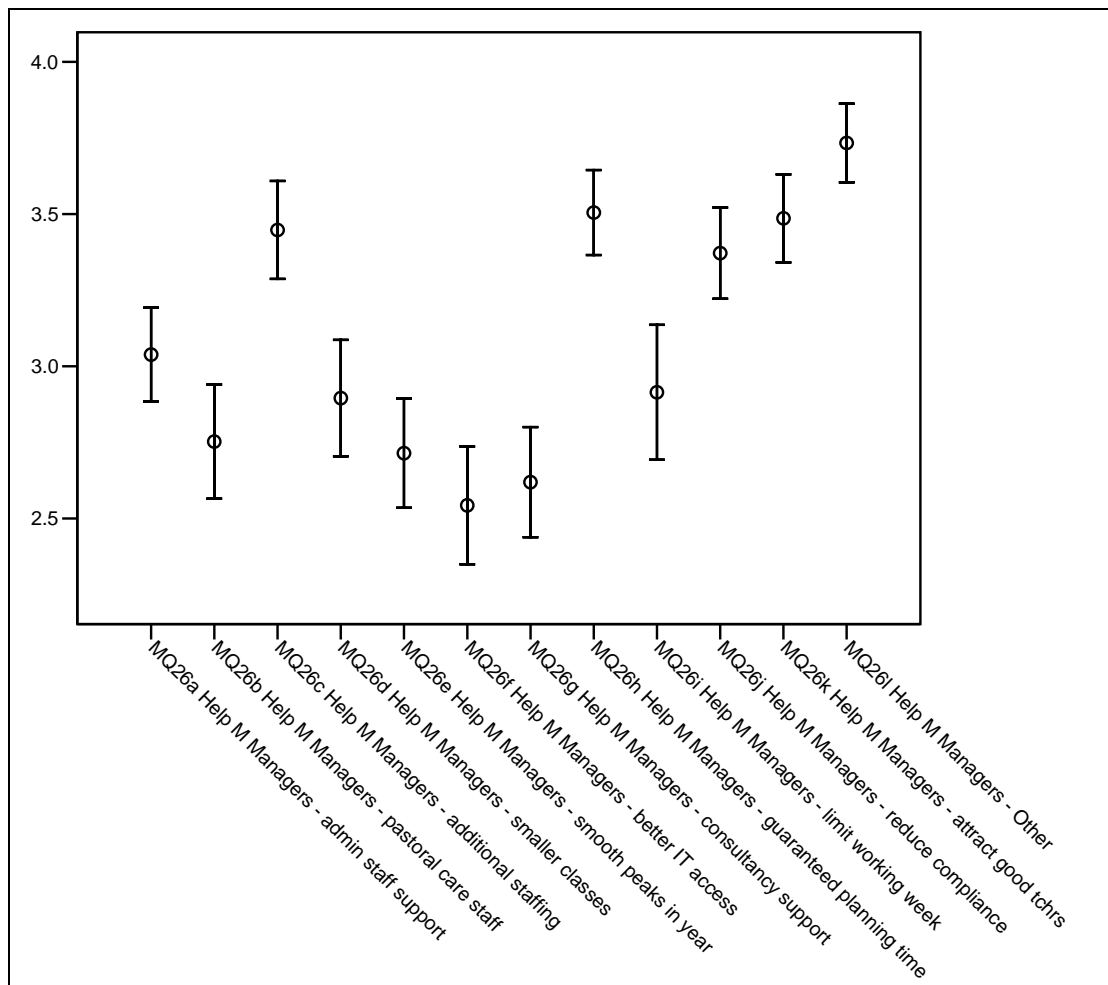
As Figure 18 shows, principals felt that, on average, additional staff, guaranteed planning time, more support and more specialists were among the highest rated supports that would assist in making teachers' workload more manageable. Among the least important factors were limiting the length of the working week and the provision of consultancy support.



**Figure 18 Mean scores on various types of support that principals report would make teachers' workload more manageable**

## Managers

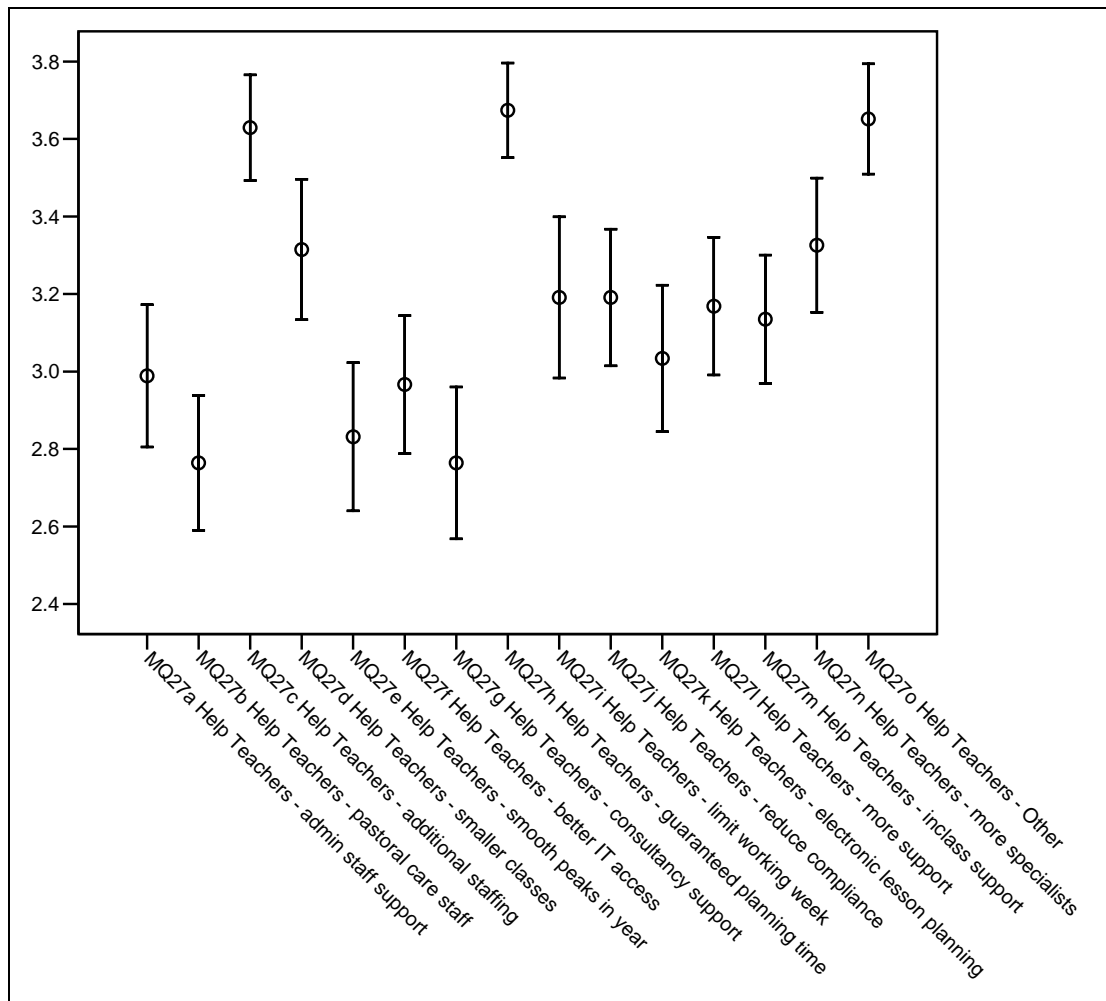
Figure 19 shows that managers see additional staff, guaranteed planning time, reduced compliance requirements and the capacity to attract good teachers as most likely to assist in improving the workload of managers. Figure 20 shows that they also believe that these factors will assist the workload of teachers in schools.



**Figure 19 Mean scores on various types of support that managers report would make managers' workload more manageable**



Figure 20 shows that managers see additional staff, and guaranteed planning time, as most likely to assist in improving the workload of managers.

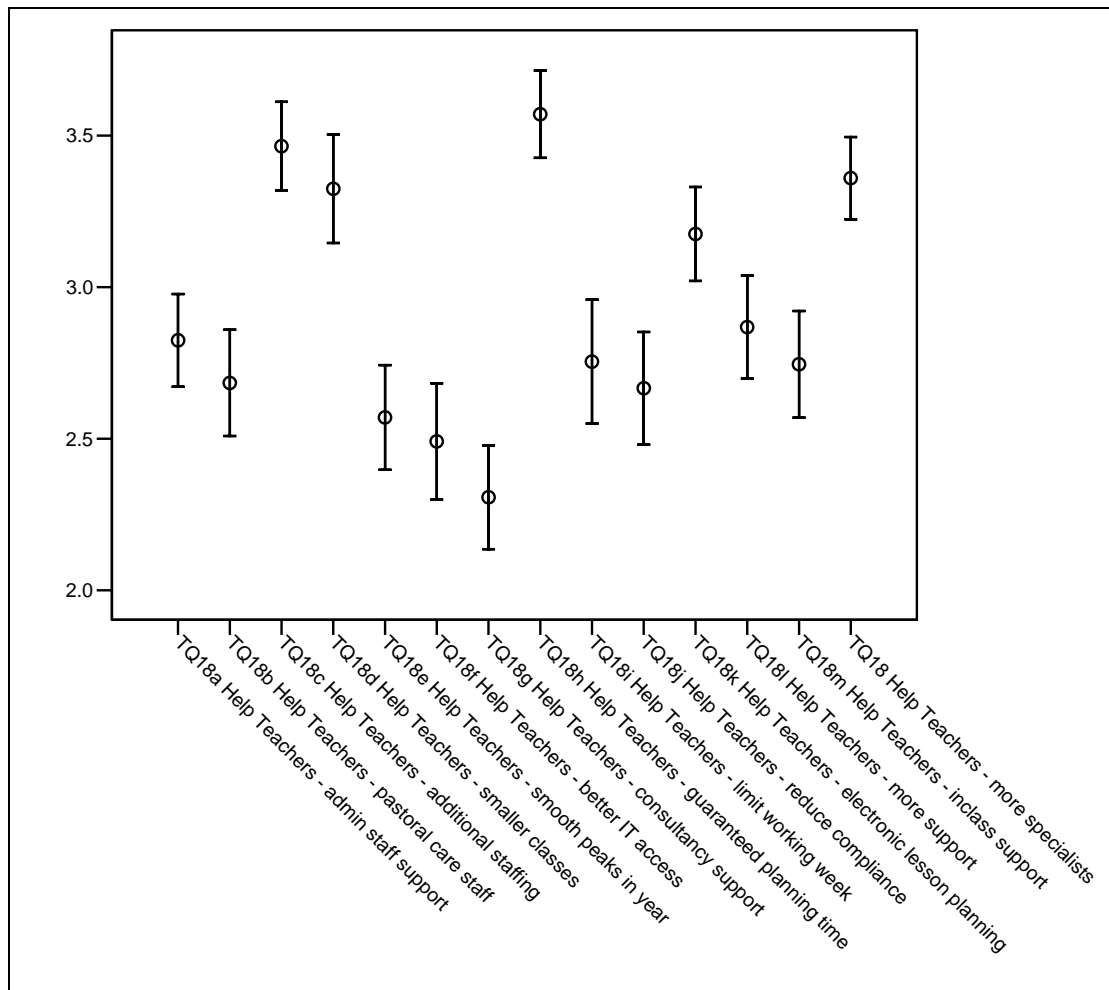


**Figure 20 Mean scores on various types of support that managers report would make teachers' workload more manageable**

Note only around 110 managers provided data for the 'Other' seen in the two figures above.

## Teachers

Figure 21 shows that teachers see additional staff, smaller classes, guaranteed planning time and more specialists as among the most important factors for assisting with their workload.



**Figure 21 Mean scores on various types of support that teachers report would make teachers' workload more manageable**

## Overview

Typically, principals, managers and teachers see increased support to reduce workload coming from the provision of additional staffing and additional provision for time to do professional work outside of the classroom.

## CHAPTER FOUR: THE CASE STUDIES

### Case Study: Hillary Boys' High School

#### School profile

Hillary Boys' High School (HBHS) is a decile 9 single sex school with 104 teachers and an enrolment of 1500 students. Founded in 1902, it has highly valued and long established traditions of achievement in both academic and sporting areas. The school also has many extra curricular activities, especially in sport.

The Principal, an old boy of the school, is in his mid thirties. Staff interviewed expressed very strong support for the Principal and the traditional 'ethos' of the school, which emphasised high achievement, development of the 'whole person' and discipline.

Every morning an assembly of all students is held in the school hall. Hymns and the school song are sung. There are speeches from the Principal, teachers, Head Boy and students, and, sometimes, a visiting speaker. These are followed by various celebrations of sporting and academic achievement.

The school assembly strongly exemplifies the school's commitment to traditional values. The Principal and teachers reported that the behaviour of the assembled boys is 'excellent' and that there is little need for teacher supervision.

The school is seen as a community of students, former students, staff and parents. Each of these groups is represented on the Board of Trustees.

The majority of students (73%) are of European (Pakeha) descent, but there are significant minorities of Maori, Pasifika Asian and other students. There are 18 full-fee paying international students. Former students are regarded as an important part of the school community and 'Old Boys' are encouraged to retain their links with the school.

#### Methodology for the case study

This school was chosen to be a case study school for two reasons:

1. it appeared to have developed effective structures for managing teachers' and middle managers' workload.
2. it appeared to provide an example of a school that faced serious issues related to middle managers' workloads, especially those of Heads of Department (HODs)

The sample of teachers to be interviewed was selected with input from the Principal, on the basis of a written request and plain language statement that set out the aims of the project.

The following people were interviewed (Note: To protect confidentiality, pseudonyms were used for the school and teachers. Management positions held and subjects taught are actual):

- ‘Michael’ - Principal
- ‘Lionel’ - Head of Maths Department, Maths Teacher
- ‘Neil’ - Assistant Dean (Year 9), Health and Physical Education Teacher
- ‘Raymond’ - Dean (Year 9), Economics and Accounting Teacher
- ‘Edward’ - Head of Social Sciences Department, Geography and Social Studies Teacher
- ‘Rebecca’ - Social Studies and Geography teacher
- ‘Graham’ - Maths teacher.

The semi-structured interviews took place in a room prearranged by the school for the purpose. The interviews followed a schedule prepared on the basis of the theoretical framework for the project. Each interview took approximately one hour. Interviews were taped, with the participants’ permission. Notes were taken during the interviews and these have been developed into field notes for use as the main source of information for this case study.

## **Documents**

The following documents were collected and reviewed:

- The school Mission Statement
- The school’s Strategic Plan
- Job descriptions for middle managers
- Management Unit allocations
- The school timetable
- The NCEA Procedures Manual
- The Weekly Information Bulletin for Term 3
- The Education Review Office (ERO) Report November 2003

## Managing teachers' work

Interviews and the review of relevant documents yielded the following information about the hours worked by the teachers who participated in the case study. With the exception of the scheduled duties, figures are estimates based on the average number of hours worked over longer periods of time.

*Table 1: Hillary Boys' School scheduled duties*

Teacher	Scheduled teaching periods (55 minutes each) per 7 day teaching cycle	Estimated time (hours) spent on management duties. (weekly)	Other scheduled duties (Home group/pastoral/yard duty etc.) (weekly)	Meetings (weekly)	Estimated time spent on preparation and marking (weekly)	Extra curricular duties
<b>Lionel HOD Maths</b>	27	15 hours	2 hours	3 hours	10 hours	1 hour
<b>Edward HOD Soc. Sciences</b>	27	7 hours	1 hour	3 hours	10 hours	2 hours
<b>Raymond Dean</b>	24	5.5 hours		3 hours	7 hours	1 hour
<b>Neil Asst. Dean</b>	30	1 hour	1 hour	2 hours	7 hours	1 hour
<b>Graham</b>	29	N/A	1 hour	1 hour		4 hours
<b>Rebecca</b>	30	N/A	1 hour	1 hour	10 hours	1 hour

School documents, especially the Strategic Plan and Charter and the comprehensive Information Booklet for staff, provided evidence of a strong management structure focussed on achieving the best outcomes for students. The various facets of school organisation and management were clearly spelt out in these documents. They appeared to be well aligned with the schools' holistic vision of supporting students' learning and personal development. The Principal said that he, the Board of Trustees and the senior management team, had worked hard to build good relationships and coherence among the individuals and committees involved in school governance and management. He stated:

Our Strategic Plan sets the goals and priorities. The subject departments set their objectives that are in alignment with the Plan. That's what we work with when we are allocating management units and time allowances for middle managers.

The work of most middle managers was in the areas of student management (Deans), and subject department leaders (HODs). Management units were allocated on the basis of the 'size' of the job. (e.g. Heads of larger departments, such as English and

Maths, received more management units than leaders of small departments, such as Languages). Having larger areas of responsibility, the HODs and Deans are supported by Assistant Heads and Deans. The expectations of the middle management positions and the lines of responsibility (to the Principal and, through him to the Board of Trustees) were clearly stated in 'Job Descriptions' for each position.

The Principal and teachers interviewed were satisfied that the management systems in the school are sound, that the people in senior and middle management positions understood their roles and performed them, on the whole, well, and that communication was good. Regular meetings of the Principal and senior and middle management were designed to ensure coherence and to avoid wasteful duplication.

A major strength was found in the efficient systems, led by the Deans, for managing student behaviour. This appeared to relieve the workloads of teachers, allowing them to concentrate their energies on the main goals of improving students' learning and personal development.

It should be noted, however, that the number of teaching periods for HODs was higher than for Deans. This seemed to be something of an anomaly, given that curriculum development, literacy, student assessment, and NCEA implementation were subject department responsibilities and that subject departments appeared to be the main units of professional community and professional development for teachers. The responsibilities of HODs were heavy, and appeared to be growing as curriculum and assessment become more complex and challenging. For example, the school's ERO Report (November 2003) noted the need to develop assessment as a learning tool, and provide more feedback to students, especially in the junior classes. The Report included recognition that:

Senior and middle management recognise the advantages of developing assessment that mirrors NCEA and several HODs are working on this.'<sup>10</sup>

But it did not mention the time consuming nature of such work for HODs and teachers.

### **Overall perceptions of workload**

Most of the people interviewed saw their workload as heavy but manageable. All teachers interviewed said that they take marking and preparation work home; all work on weekends, mostly on Sundays. One teacher said that she usually started work at school at 7 a.m., when there was easy access to the photocopier. Another said that he starts his marking each morning at 5.30 a.m. at home. However, some of the teachers said that they appreciate the flexibility of deciding when and where their marking and preparation work could be done. They said that they generally feel in control of their personal work schedules and enjoy working at the school, as the following statements illustrate:

Yes, there are some stressful periods, like when we're having parent teacher interviews, but it's up to the individual to be organised. I'm

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<sup>10</sup> ERO Report for HBHS p.7

really happy. I like the job. I don't generally feel overworked at all. (Rebecca, teacher, Geography and Social Studies)

I really don't feel any stress or pressure. I love the challenges. I even take more sports teams than I have to (six rather than one) because I enjoy it and we get lots of support and feedback (Neil, teacher, Physical Education and Health)

One teacher said that although he generally managed his workload successfully, and liked working at the school, he found that he was working much harder since the introduction of the NCEA:

No teacher will talk negatively about this school. The conditions are about right. But I liked the old system better than the NCEA because you could cruise. (Graham, teacher, Maths)

The two Heads of Department (HODs) who were interviewed appeared to be the most stressed in terms of workload. Their work entailed providing leadership and advice to faculty members, preparing and administering budgets, appraising staff and organising professional development, writing curriculum materials, preparing resources and designing and administering assessments. Both interviewees said that they were experiencing considerably increased workload, almost entirely due to NCEA implementation. One very experienced HOD (Graham, HOD Maths) said that his workload had 'doubled' as a result of the NCEA, that he has 'had enough' and is intending to take early retirement at the end of the year. The Principal said that this teacher's views are those of a 'minority' of teachers, stating:

The great majority of teachers are positive. There's a general feeling that we have to ignore negativity, because demands from things like the NCEA aren't going to go away. (Michael, Principal)

The other HOD who was interviewed also stated that his workload had increased, but he believed that the most difficult period of learning about the NCEA and preparing necessary materials was behind him:

Once (the NCEA) is all set up it won't be so bad. I reckon I'll soon be about right in terms of my job. For Heads of Department, our workload is the most. We're caught with teaching and curriculum and administration. I feel flat out at the moment, but if I look at the time allowance I have, it's about right. That's in this school. I wouldn't know about others. (Edward, HOD Social Sciences)

## **Factors that affected workload**

### ***Student behaviour management/pastoral care***

The teachers interviewed said that managing student behaviour was not something that influenced or increased the pressure of work in that school. One teacher stated:

Discipline is ninety percent of teaching and this is a great school for discipline. I have no discipline problems in my classes. You're a teacher or you're not a teacher. I love getting up and coming to school every morning. (Neil, Assistant Dean, Year 9 )

Good student behaviour appeared to be chiefly due to two factors. First, the school set high expectations of the boys in this regard. The school was recognised in the community for its high academic and sporting achievements and its emphasis on discipline. Staff said that the boys were proud of their school and anxious to live up to its high reputation. Misbehaviour was not seen as 'cool' but as 'loser stuff' (Graham). Teachers said that parents chose the school because of its reputation for upholding traditional values like respect, discipline, courtesy and sensible conduct. The daily school assembly was a significant means of asserting and upholding these values, as the Principal stated:

The assembly at the beginning of the day sets the culture for the school – establishes the basic standards. We begin with the Lord's Prayer then there is the school song or a hymn. The Head Boy speaks. We make sure that things are tight. The assembly is a forum to celebrate successes. (Michael, Principal)

Neil, the Year 9 Assistant Dean said that he regularly checked the students' 'log books' and that of three hundred and ninety boys, only about five need to be regularly 'dealt with'.

The second factor assisting in positive standards of student behaviour was that the school appeared to have developed effective and efficient systems for managing student behaviour. We visited the building that houses the 'School Support Centre'. This incorporated the offices of the Deans and Assistant Deans, the School Counsellor and the Careers Adviser. Two full time secretaries provided the first point of contact in the Centre for staff, students and visitors. They dealt with routine administrative tasks like checking school uniforms, giving out late passes, lost property and following up student absences. Consequently, the Deans' time could be allocated to deal with more serious issues. Deans' time allowances were also relatively generous. There was always a Dean on duty with dedicated time available to deal with instances of student misbehaviour, in accordance with agreed whole school codes and procedures. This meant that a teacher could send a student out of class at any time, in the knowledge that any problem would be thoroughly and fairly addressed.

We were impressed with these arrangements. The highly visible investment in the physical appointments, staff, and time, most notably the concentration of Deans and support staff in the one area, sent powerful messages to the whole school community about the high value placed on sustaining a caring, yet disciplined, environment. There was no doubt in our minds that this relieved teachers of a great deal of workplace stress and lightened their workloads. Furthermore, the workload of the Deans as middle managers was concentrated on helping students at risk and improving the learning opportunities for all students, rather than dissipated on non-professional tasks. This, in turn, increased the Deans' sense of efficacy and job satisfaction.



### ***Resources and Support***

All teachers interviewed were satisfied with the resources available to them and the levels of support from colleagues and senior management.

It was school policy for teachers to have their own classrooms, and for most, this policy objective was met. Each classroom had an overhead projector and TV/video equipment. Teachers had open access to stationery and most other teaching requirements. Computers were available in classrooms and in dedicated computer rooms. One teacher stated:

I am nearly always in that classroom. I have a real sense of ownership – of my own personal space. I have enough room. It's very nice because I can put my own things out. (Rebecca, teacher, Geography and Social Studies)

Teachers also had desks in a shared staffroom adjacent to a pleasant lunchroom. The interviewees all said that having their 'own space' was very important to them and that they could not imagine having no classroom of their own. The middle managers had offices, (some shared with other managers) telephones, computers and access to shared secretarial support. The Deans were well satisfied with the levels of support available to them in the Support Centre. The HODs had access to the school secretarial staff, but they said that more support in the form of typing, data entry and photocopying (although the school employed one full time person for photocopying) was needed.

### ***Leadership and Vision***

The Principal clearly had strong support from his staff. Even Lionel, the HOD (Maths) who is planning to take early retirement because of dissatisfaction with new curriculum arrangements, was full of support and admiration. Here are some of the statements made about the Principal:

The Principal is absolutely wonderful, way ahead of his years. He's outstanding and the staff know it. (Lionel, Head of Maths Department)

(The Principal) works really hard at maintaining the vision. He recently asked for feedback about the vision. He's not a dictator. He has high standards but he doesn't push people. He has an open door policy that is genuine. You can just walk in (to his office) at any time. (Rebecca, teacher, Geography and Social Studies)

He's an absolutely outstanding leader. The school has gone higher even than previously since he came. He is very supportive and easy to communicate with. I would move schools to stay with him. (Neil, Assistant Dean)

The teachers interviewed said that the middle managers provided strong support, particularly with NCEA implementation. They believed that the HODs work extremely hard to provide resource materials and curriculum assistance, as illustrated:

I know that I can go to (the HOD) at any time for help. He has a totally open door. He's well organised and provides lots of resources. He does everything for us. I can't imagine what it would be like without him. (Rebecca, teacher, Geography and Social Studies)

Just ask (the Maths HOD) He works so hard. He helps us so much but it's too much work for him. (Graham, teacher, Maths)

The Principal said he believed it was very important to 'share the vision and values'. He made a point of personally giving feedback to middle managers, especially as part of performance review processes, during which he spoke 'one on one' with middle managers. He saw this as a kind of 'modelling' for Heads of Department, who were responsible for the performance review processes for teachers in their departments.

The Principal said that the school also provided rewards and incentives for teachers who had 'gone the extra mile', especially those who participated in extra curricular activities.

### ***Professional community and development***

Subject departments were clearly the main units of professional community and development in the school. Teachers said that they worked collaboratively with colleagues within their subject departments, and that, under the strong leadership of HODs and assistant HODs, departments were the focal point for professional practice and learning. Weekly Department meetings were timetabled before school and meetings were also held regularly after school. Teachers said that they often met informally, as well as formally to discuss aspects of their work, to develop curriculum programs and to moderate student work samples. Teachers did not feel that these meetings added to their workload, because the business focussed on classroom needs. One teacher said that the meetings actually lightened workload because of the sharing of ideas and materials. The HODs and assistant HODs played a key role in bringing subject teachers together and in guiding their professional learning and development.

Teachers also meet, formally and informally in cross faculty groups. These groups include groups of teachers who teach the same Year Levels. They also include groups of teachers who are involved in particular activities, especially extra curricular activities.

### ***Extra curricular activities***

Extra curricular activities were seen as a very important part of education at HBHS. All students and teachers were expected to participate in some form of sporting or cultural extra curricular activity, but because of the necessarily voluntary nature of the activities, not all did so. There was a great range of activities from which to choose.

The Principal was very keen to ensure that the extra curricular program continued to flourish. The School Strategic Plan and Charter set a target of ninety per cent student participation in 2004. The Principal stated:

We really need to value the extra curricular stuff. It makes this school what it is and parents have very high expectations. We expect staff to be involved in at least one activity. But of course this does place extra stress on teachers. This is a real issue here. (Principal)

The Principal initiated a scheme of ‘rewards and incentives’ for staff members who spent ‘their own time’ on activities, like weekend sport. These included holiday weekends for the staff member and a friend, spouse or partner.

Teachers interviewed said that they enjoyed the activities and found them invaluable in terms of forging good relationships with students and colleagues.

Edward, (HOD Social Sciences) was also a sports coach. He had travelled in New Zealand and internationally with the highly competitive school teams. He, like others, enjoyed his involvement, as these statements highlight:

Things like the assembly and extra curricular activities help people to see that we are all pulling in the same direction. We’re holistic about what we’re trying to do. We have non-academic as well as academic goals, and the community are right behind us. The activities allow students to see teachers in another light. Sport certainly eats into my weekends. In the season I’m flat out all the time, but I really enjoy it because I can see the value. (Edward)

I’m involved with Rugby, Rock Climbing and the School concert. Sport is a huge commitment here. In actual fact it’s good when you’ve got a team and you get to know the boys and they get to know you. But sometimes, like when you’re going away with a team, it gets too hard. (Graham)

Clearly a tension existed here between maintaining programs that were seen to be central to the ethos of the school, and the extra demands of this ‘voluntary’ work on teachers’ time and energy. Staff appeared to be supporting the programs because of tradition, because they saw value in them, because they enjoyed them and because of the school’s vision and leadership.

### ***Government requirements***

#### *Performance Review*

All people interviewed said that the school had developed efficient and effective systems for carrying out staff performance reviews. These processes were standards based, linked with professional development and aligned with whole school, department and individual needs and objectives. The Principal appraised senior and middle managers; HODs appraised teachers. Although the appraisal processes added to workloads, especially those of the HODs, all felt that they were sufficiently valuable to justify the extra workload demands. Lionel, however, felt that there was an unnecessary amount of paperwork attached to the processes.

In 2003, the school was reviewed by the Education Review Office. (ERO) The Review was favourable, and teachers interviewed said that they did not find the experience to be onerous. In fact, they had little to say about the Review, except that they agreed that schools and teachers should be 'accountable'. For the Principal and the School Board the Review, although it obviously increased their workload at the time, was both necessary and helpful:

My only question was: 'OK, so we're 8 ½ How do we get to 10?'  
(Principal).

The Review Report did, however, place extra demands on the school and on teachers in terms of its recommendations for improvement. As previously noted, the report suggested improvements in assessment, especially at junior (non-NCEA) levels, and provision of more and better feedback to students. It also noted the 'traditional' style of teaching practised by most teachers, and recommended that:

Management assist teaching staff to extend the range of teaching strategies to better meet the different learning needs of students.<sup>11</sup>

The teachers interviewed said that most teachers in the school taught 'from the front of the class'. They saw this mode of teaching as being in keeping with the traditional ethos of the school, and were satisfied that the approach worked well. Moving to more differentiated teaching approaches would entail considerable professional development and change. As with (ERO) recommended changes to assessment practices, implementing this recommendation would make heavy demands on the Heads of Department, who already seemed to be stretched to the limits in terms of workload.

#### *The NCEA*

NCEA development and implementation appeared to be the major workload issue at HBHS. Most of the people interviewed believed that it was educationally valuable, but said that it had greatly increased their workload. Rebecca said that she was only now, 'getting used to it.' Other comments included:

Assessing against standards is good, but standards based assessment means much more work for teachers. I'm not sure if it's the right thing for these boys, because they are very competitive here. (Rebecca)

It's the stress of it. And the complexity of the marking grid. You have to mark the paper and then transfer the marks to the grid. Then there's all the arguing with the other teachers and trying to communicate with the moderators. The moderators won't communicate with the teachers. You can't ask them questions. They're talking about bringing it in at the junior school. I'm not even coping at the senior end. (Graham)

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<sup>11</sup> Education Review Office Report for HBHS p.12

All agreed that the demands of the NCEA had fallen most heavily on the HODs, as Graham illustrated:

The NCEA has hugely increased (the HOD's) workloads. There is no way we could have done it without them. They prepare the assessments and materials and give us advice. Then they have to co-ordinate the teachers' marking. Does the student deserve the mark? Yes or no? Why? Why not? So many questions take up so much time! (Graham)

Edward, the Social Sciences HOD expressed strong support for the NCEA. He acknowledged its effect on his workload, but said that the effort was 'worth it' because:

It's a good system. It's about setting up assignments to make sure students reach the standards. It's about using formative assessment to help students as well as summative assessment. It has some really good aspects, like making you think about how you mark and assess. It's intellectually difficult and challenging. You need to really understand it to do it well. (Edward)

However, Edward was experiencing real difficulties finding time for such tasks as moderation, and is frustrated by the lack of materials in his subject areas:

I worry about moderation within the department. It has to be done, but when? We just do it whenever it can be fitted in. After school, lunchtimes.

The English staff love it, but that's because English lends itself to that kind of assessment and because there are plenty of materials available on the web. We have to do our own.

Lionel, the HOD of Maths was angry about the NCEA. He planned to take early retirement because of the NCEA. He said that the NCEA had 'more than doubled' his workload and he thought that the extra work was unnecessary and the system less effective than the previous approaches to Maths curriculum and assessment. It also, he felt, took time away from teaching students, as he stated:

What are they trying to do? The NCEA does not work for Maths. The teachers don't like it and the kids don't like it. The syllabus has been diluted. The kids are smashed. They have to do something every week that 'counts'. It's not healthy and all the practice assignments cut into teaching time. The kids are learning less. (Lionel)

There's too much paper work. Too much filling in of forms and marking. It's cut in to my teaching time. My focus is on kids, not marking and preparation. This (NCEA) is killing teachers. (Lionel)

Like Edward, Lionel complained about the lack of suitable materials for his subject and the time he had to spend developing the assessments. He said that he 'only

managed' to lead the teachers in his department because of the support he had from the teachers and, especially, the assistant HODs in his department.

As a Maths specialist, Lionel said that he had already had many offers of work outside teaching. He had taught successfully for many years, had 'always had good results' and was respected at HBHS and in the broader community of Maths teachers in other schools. The Principal said that the school would be very sorry to lose Lionel, but that he respected his choice.

## **Summary**

Most of the people interviewed at Hillary Boys' High School expressed positive feelings about their workload and enjoyed teaching at the school. This was seen to be due, in large part, to the following:

1. The school has policies and programs that reflect a clear vision focussed on achieving the best outcomes for students. These are spelt out in comprehensive, publicly available documents. The various facets of school organisation and management are well aligned with the school's vision. Job descriptions and fair, orderly processes for the allocation of management units ensure that expectations of people who hold positions of responsibility in the school are clearly understood. Communication between the various individuals and groups responsible for managing school operations appears to be sound.
2. The personal beliefs and values of the great majority of teachers at the school appeared to be in alignment with those expressed in school policies.
3. The school followed established traditions that set high expectations of students. Student behaviour appears to be of exceptionally high standard.
4. The school had developed very effective student management systems. Deans had comparatively generous time allowances and were administratively well supported.
5. The school appeared to be well resourced. Teachers had their own classrooms, with resources that included computers, overhead projectors and video equipment. They also had carrels in a shared staffroom. Middle managers had their own offices and access to administrative staff.
6. The school appeared to be very well led by an energetic and talented young Principal who had the strong support of his staff.
7. Professional community among teachers was well developed, mainly within subject departments. Regular, timetabled subject department meetings aided the maintenance of high levels of professional community among teachers in their departments. Working collaboratively on curriculum and assessment, including NCEA, was also seen to contribute to improving levels of professional community.

8. Extra curricular activities contributed strongly to the positive relationships observable among all members of the school community.

The HODs were the only people interviewed who felt that their workloads were heavy to the point of being unmanageable. The other middle managers, teachers and the principal also recognised and expressed concern about the heavy workloads of the HODs. The NCEA appeared to be the chief contributor to the workloads of these people who were leading their staff through a period of major change.

The school's ERO report (November 2003) recommended that teachers develop a wider range of teaching strategies, that all subject departments develop literacy goals, that parents receive more information about how to promote their children's literacy development, and that teachers learn to use data to support their curriculum planning. Implementing these recommendations will require a great deal more work from all teachers, especially Heads of Department.

## **Case Study: Gladstone High School**

### **School profile**

Gladstone High School is a co-educational secondary school (Years 9-13) in Gladstone, approximately twenty kilometres from a main centre. Formerly a rural village, Gladstone is now a rapidly developing suburb.

The school has a decile rating of 9. There are 1200 students, 37 of whom are from overseas and pay full fees, and 76 teachers. Most students are of European (Pakeha) background, 8% are Maori, 0.8% are Pasifika and 0.8% are Asian. There is an almost equal mix of boys and girls.

The educational vision of the school is based on an understanding, shared by all members of the school community that students will need to take their place in 'the modern world.' This is defined in the Strategic Intent document as:

- Global economy and community
- Communication a key strategy
- Focus on Environmental Sustainability
- People need to be lifelong learners
- People need to be adaptable to rapid and continuous change
- There is a questioning of value systems
- Changing cultural mix within New Zealand

This futures orientation is reflected in 'Strategic Projects' that include ICT development, environmental education projects, transition to and beyond high school and sustained teacher learning and development projects.

### **Methodology for the case study**

This school was chosen to be a case study school because:

1. It appeared to be a growing school in a developing area that was responding positively to the challenge of preparing students for a changing world.
2. It appeared to be a strongly led school that had gone beyond the rhetoric of developing as a strong learning community, to building the capacity of teachers to be responsible for their own work as collegiate and collaborative professionals.

We were interested in the effects of these features of the school and its policies and programs on the workloads of teachers, especially those with middle management responsibilities.

The sample of teachers to be interviewed was selected with input from the principal, in response to a written request and plain language statement that set out the aims of the project.



Interviews took place at the school on Tuesday 31<sup>st</sup> August. The following people were interviewed:

(Note To protect confidentiality, pseudonyms were used for the school and teachers. Management positions held and subjects taught are actual.)

‘Anna’ the principal  
‘Marie’ Head of Department (HOD) Physical Education  
‘Sam’ Deputy Principal  
‘Tom’ HOD Science  
‘Hermione’ HOD Performing Arts  
‘Emily’ teacher, English, Drama  
‘Rose’ teacher Textiles, Food and Nutrition  
‘Jim’ Board of Trustees Chairperson

The semi structured interviews took place in a room provided by the school for the purpose. (The interview with the Principal took place in her office). They followed a schedule prepared on the basis of the theoretical framework for the project. (Case Studies Attachment 1). Each interview took approximately one hour. Interviews were audio tape recorded, with the participants’ permission. The Researcher also took notes during the interviews. Information from the tapes and notes were developed into field notes that were the main sources of information for this case study.

### *Documents*

The following documents were collected and reviewed:

- Statement of Strategic Intent
- Statement of Strategic Projects
- School organisation documents that described professional development, resources and support
- ‘Professional Learning Groups and Teams’ document
- School organisation document that described the committee structure
- Timetables of participants
- Job descriptions for HODs and teachers
- Education Review Office Report (June 2004)

## The workload of teachers and middle managers

### *Hours worked by teachers and middle managers*

Interviews and relevant documents yielded the following information about the hours worked by the people who participated in the case study. *Apart from the scheduled duties, figures are estimates based on average number of hours worked over longer periods of time.*

Teacher/middle manager	Scheduled teaching periods. (55 mins.) per 5 day weekly timetable	Management No of hours weekly	Other scheduled (homegroup/pastoral/yard duty etc.) and voluntary duties No of hours	Meetings No of hours weekly	Estimated Hours spent on marking and preparation (weekly)	Extra curricular duties
<b>Marie HOD PE</b>	19	3 (HOD) (scheduled) Up to 3 non scheduled	1 hour (scheduled)  Up to 5 sports coaching. (voluntary)	2 hours	12 hours	4 hours
<b>Tom HOD Science Tutor Year 11</b>	13	4 (Tutor) 3 HOD (Up to 3 non scheduled)	1 hour scheduled  Up to 4 extra pastoral. (voluntary)	3/4 hours	10 hours	2 hours
<b>Hermione HOD Perf. Arts</b>	20	4 (Up to 3 non scheduled)	1 hour  Up to 4, rehearsals, singing groups. (voluntary)	3 hours	12 hours	2 hours
<b>Emily Teacher</b>	23	N/A	1 hour (scheduled)  Up to 3 Arts Council, lunchtime activities (voluntary)	2 hours	15 hours	2 hours
<b>Rose Teacher</b>	21	N/A	1 hour (scheduled)  Up to 3 camps, sports (voluntary)	2 hours	9 hours	2 hours

Review of school documents showed that the school management structure was well aligned with the school's vision of becoming a strong learning community.

The school appeared to have an efficient management structure. The Principal and Deputy Principals said that the senior management team were keenly aware of the heavy workload of middle managers. They tried to alleviate workload and keep it to manageable levels by prioritising tasks.

It's the role of senior management to prioritise. Everything that comes across my desk – every single thing – has a benefit. But for every potential benefit there is a cost. Our task is to be aware of the costs and

weigh up the benefits in terms of workloads. You can't just pile one thing on top of another so that it never ends. It's just not possible to take on everything. (Sam, Deputy Principal)

Every time something new comes out someone filters it through. (Anna, Principal)

Jim, the Board of Trustees Chair, who had two children at the school, said that there was 'a very good relationship and great communication' between the Board of Trustees and the school administration and staff, and clear understandings of respective roles and responsibilities:

(The Board's role) is largely a facilitating role. Its role is governance. It sets the strategic direction of the school. Management sees to it that the direction is being followed.

Jim was well aware of teacher and middle manager workload issues. He believed that the school had developed good systems for managing workload and that workloads were being well monitored.

The culture of the school is very directed to teaching and learning. We are fortunate that the Principal and Senior Management are so aware of what that means for staff workloads. (The Principal) talks one on one with staff every year as part of the Performance Review system. We have had very good feedback. This is a very IT literate school, and that helps a lot with workloads. Also PD (helps). One teacher said that the PD she has had at Gladstone has been the best in 25 years of teaching.

### **The work of middle managers**

Middle managers at Gladstone High School had a range of responsibilities. Most were in the areas of curriculum leadership (Heads of Department) and student management (Deans and tutors).

Deans and tutors carried out administrative duties connected with day to day student management, including allocation of students to classes, student absences and lateness, maintaining contact with parents, liaison with outside agencies, supporting classroom teachers and dealing with incidents of student misbehaviour.

Heads of Department provided leadership for teachers working in their Departments. They managed resources, developed syllabi in accordance with national guidelines and local requirements, and worked with new teachers, providing professional guidance and support. They also assisted in the appraisal of teachers in their Departments and reported to the Principal and senior management team as required.

Middle managers had leadership roles in the following cross faculty groups and teams. The activities were voluntary, but all teachers were encouraged to participate.

**Professional Learning Group** (Met 3 times per term). Discussed 'exploring learning' e.g. constructivism, co-operative learning, habits of mind.

**Focussed study teams.** (Met 3 times per term) Discussed ‘Classroom strategies that work, e.g. research based strategies for identifying similarities and differences among learners, strategies for managing the learning environment.

**Action Learning Team** (Met 5 times per term). Research, reflection and inquiry, on an individual or team basis into areas of interest and concern.

**Class Learning Teams.** Met as needed a number of times a term to clarify goals, plan, share and reflect on practices and language.

### **Leadership Forum**

HODs took turns, in pairs, facilitating the learning of key ideas and practices from a particular source. (the focus in 2004 is on Emotional Intelligence.)

### **HOD Assessment Team**

HODs of Maths, English, Science and Social Sciences met on a regular basis to understand and develop practices in assessment that enhance teaching and learning.

Although all of these activities made heavy demands on middle managers who provided leadership, those interviewed were proud of their achievements and valued the opportunity for school based and directed professional development. No one complained that professional leadership duties added to their workload.

## **Overall perceptions of workload**

### ***Middle managers***

The middle managers interviewed used the adjectives: ‘challenging’, ‘frustrating’, ‘overwhelming’, ‘stimulating’, and ‘tiring’ to describe their workloads. The general impression, gained by the researcher, was that much was being asked of teachers and middle managers in this school, but that they were following a clear vision and were receiving strong support and professional development to enable common, teaching and learning focused, goals to be achieved.

I do feel overworked most of the time, especially in winter. The work comes in flurries. Sometimes I think it’s ridiculous. I look at other people (in other jobs). I look at home life. Others can put their feet up, we (teachers) can’t. (Marie, HOD Physical Education)

The middle managers also said that they felt a considerable degree of personal control over the amount of work they chose to do:

(Workload) is not a major problem in my life I manage it. I like systems and I’m organised. I would drop something if it was (a major problem). For example I already dropped being in overall charge of the netball program. (Marie, HOD, Physical Education)

I enjoy contributing and I put in a lot of extra work, I do many things around the school. But I'm organised – over organised, my Department can almost run itself now. (HOD Science and Year Level Tutor)

The middle managers did not believe that their management duties caused them to become less effective classroom teachers. They took pride in their personal organisation and believed that they learnt from helping other teachers. One teacher, however, said that she had given up her middle management position because it was adversely affecting her teaching:

A lot of people decide not to do middle management. Teaching is my focus. (As a middle manager) I felt that my teaching was suffering – I had no time to plan for new resources. (Emily, English and Drama teacher, former middle manager)

### *Teachers*

The teachers said that they found their work 'challenging' 'rewarding' 'exhausting' 'creative' 'invigorating' and 'frustrating'. Any feelings of overwork did not appear to be because of demands that the school was placing on them, but because of the nature of teaching itself. They said that they generally felt in control of managing their own work (computers were a major factor in this) and that they made their own decisions about the amount of effort they were prepared to put into it:

You have to work hard if you want to be a good teacher. If you don't, you won't be catering for newer things like thinking skills, because you'll just be using old stuff. Some teachers seem to get away with it, they don't take work home, but I can't see how that's satisfying. I love my job. (Emily)

Yes, I'm busy (sigh). But I do find it challenging and invigorating. There are good systems in this school, especially ICT. I use the computer to organise my own work. All my work goes on the computer and that is a big plus for organisation – but I have to check for emails every day and I sometimes wonder if that doesn't just make more work. (Rose, teacher, Textiles, Food and Nutrition).

## **Factors that affected workloads**

### *Student behaviour/pastoral care*

All people interviewed expressed concerns about the behaviour of students. However, the school appeared to have good systems for dealing with student misbehaviour.

The kids here understand the system but they will push it. They work to the edge of the boundaries. Some students are arrogant. Some teachers have big problems. That does add enormously to workloads. (Marie, HOD Physical Education)

We're dealing with different types of kids. Senior management spends a great deal of time on student misbehaviour. It takes up at least half of my time – contacting parents and so forth. This is not an easy school, it's a fairly typical co-ed school. (Sam, Deputy Principal) <sup>12</sup>

This is a good school. We don't have high numbers of challenging students. But those we do have take up a lot of time and effort. The HODs assist their staff with managing student behaviour. They give them ideas about practical work and creating a safe environment. (Tom, HOD Science and Tutor)

Managing student behaviour was perceived by the people interviewed as an issue that was negatively affecting teachers' workloads. Teachers and middle managers reported having to spend additional time speaking with parents, following up reported incidents, liaising with the School Counsellor, Deans and Tutors and members of the senior management team.

The people interviewed generally felt that Gladstone High School had fewer discipline problems than many other schools. They had confidence in the systems the school had developed to deal student behaviour management, and they appreciated the extensive professional development they had been given in this area. However most said that the daily stresses of dealing with difficult students in the classroom and school environs added to their feelings of overwork. Senior and middle management were very supportive of teachers in dealing with issues of discipline, but this placed extra demands on their own workloads.

### **Resources and support.**

All teachers and middle managers interviewed were satisfied with the physical resources of the school. Teachers had their own well resourced classrooms, with audio-visual equipment and computers. Deans and HODs had offices with ready access to necessary equipment like a telephone and computer. But most felt that they were performing some work that could be done as well or better by non teaching staff. This included clerical duties like 'form filling' and data entry. One middle manager suggested that his workload would be less if work like tracking student absences and making some telephone contact with parents were done by an administrative officer. All said that they would appreciate more assistance with clerical tasks, especially photocopying. However none were prepared to say that lack of resources was an issue that seriously added to their workloads, or prevented them from teaching effectively.

### **ICT**

Gladstone High School developed its first ICT plan in 1998, and is recognised as the leading school in an ICT development cluster with two other High Schools. It is well resourced in computers and other ICT equipment (e.g. data show projectors are available to all staff). The ICT skills of the teachers and middle managers appeared to be exceptionally well developed. They said this was due to extensive professional development and to the positive and collaborative learning culture of the school, which encouraged teachers to support each other in developing their ICT skills.

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Note: Gladstone High School was a Decile 9 school. Sam's comment that it was a 'fairly typical co-ed school' needs to be read with this in mind.

Good skills and strategic use of ICT by teachers and middle and senior managers lightened workload in several respects. Advantages mentioned included:

- Easier and more effective communication in all areas of the school's operations
- Usefulness of administrative tools such as spreadsheets for keeping track of budgets and emailing
- Planning storing and sharing curriculum
- Access to 'a vast storehouse' of research based information about teaching and learning
- Helping to manage blocks of time, keep records and make appointments
- Classroom applications that increased student engagement
- Increasing teachers' and middle managers feelings of being 'organised' and 'in control'.

### **Leadership and vision**

Strong leadership and clear vision were features of Gladstone High School. The Principal, whose leadership style was collaborative and goal orientated, appeared to have the full support of staff. There was evidence of shared, or 'distributed' leadership in the regular professional learning group and team activities and professional development, in which all staff with three management units or more were expected to play a leadership role. These activities encouraged leadership and contributed to the overall sense of the school as a dynamic learning community.

### **Professional community and professional development**

The teachers at Gladstone High School appeared to have developed exceptionally high levels of professional community. Participation in professional development also appeared to be strong, with positive effects on teachers' knowledge and skills.

Teachers worked collaboratively in subject department groups, led by HODs. There was also evidence of strong cross-faculty professional community in the learning groups, focussed study teams, action learning teams. leadership forum, class learning teams and HOD assessment team. These activities were aligned with the school's vision of life long learning. Teachers and middle managers did not see the extra work entailed as unduly onerous. On the contrary, they appeared to accept it quite gladly because they saw it as increasing their levels of personal and professional knowledge and, importantly, because they could see its value in helping them to better serve the learning needs of their students.

### **Government Requirements**

#### *Performance Review (Appraisal system)*

The schools policy for staff appraisal was closely linked with the policies and programs for professional learning. The appraisal processes included:

- Observation by a colleague and completion of an observation form

- Completion of a Professional Development Review Report, including job descriptions, evaluation of last year's goals and the setting of goals for the coming year
- A 'one on one' meeting with the Principal
- Preparation and storing of a Professional Development Review (PDR) report by the Principal and teacher.

The people interviewed at Gladstone High School did not see these processes as unreasonable impositions on their workloads. One middle manager said that it was very difficult to find time for the observations and that he would appreciate more support from the administration in terms of providing this time. But he, like the other people interviewed, accepted that teachers should be accountable. He said that he fully understood the constraints of the total situation and believed that the school systems worked well. This very positive attitude to appraisal was almost certainly because of its close alignment with the school's vision and culture of learning. It seemed likely that performance review was a positive rather than negative contributor to teachers' and middle managers perceptions of workload in this school because it helped them to set and evaluate goals, reflect on their successes and areas of difficulty and organise professional development accordingly. They also appreciated feedback from colleagues and the principal. They said that the appraisal helped them to work more effectively and efficiently. The one problem, as all remarked, was finding the time to do it well.

### **Education Review Office (ERO) Review.**

Gladstone High School received its Education Review Report in June 2004.

The Review processes did not appear to have caused workload concerns for teachers or middle managers. The Report was very positive. It commented on the school's strengths: a shared vision, reflective culture, strong leadership, curriculum, staff professional development, and high levels of knowledge and skills in ICT.

The Report recommended that teachers should develop skills in catering for diverse groups of students. It also commented that 'curriculum leaders' should learn how to use collated information on student achievement in the essential learning areas to improve student learning and that some teachers should improve their assessment practices to give students more specific feedback.

Efforts to improve in these recommended areas will involve complex aspects of teachers' professional expertise. They could take a toll on workloads, especially those of HODs. However the school, as a strong professional learning community, has developed the capacity to take up new challenges. The apparently sound co-ordination of effort and communication between the various teams and groups within and across the subject departments, should maximise efficiency by avoiding duplication of effort.

### **The NCEA**

All of the people interviewed philosophically supported the NCEA and said that they believed it was having a positive effect on students' learning.



It's a different way of teaching, based on standards and outcomes. Some older teachers struggle with the concept and some of the new ones haven't learnt anything about it in their (teacher education) studies at university. But the workshops and PD have been good, and it was good that they introduced it slowly, level by level (Marie, HOD Physical Education)

It involves an essential change in philosophy. Teachers need to internalize the objectives and the trouble is some of them just don't have that sophistication. But it has great advantages. The kids know what's expected and they discover what they are good at. (Tom HOD Science)

These generally high levels of philosophical support for and sound understanding of the NCEA were probably due to the professional development available to teachers at the school. But the workload issues were still of concern. One of the main areas of difficulty appeared to be the amount of 'paper work' and 'administrivia'

Too much filing of pieces of paper distracts teachers from teaching. (The NCEA) becomes an administrative nightmare. Some administrivia should be able to be dealt with by clerical staff. (Tom HOD Science)

Another problem was the amount of materials development that had to be done at the school, because suitable 'exemplars' were not centrally available in some subjects. (English was noted as an exception).

I feel sorry for teachers in the other subject departments. They've had to create all of their own new stuff. English is much better, the assessments are really good. But the NCEA has increased workloads for all of us. (Emily, English and Drama teacher)

Rose, who had worked in English schools, drew comparisons with English national curriculum and assessment.

In London the curriculum guidelines were much clearer, and there were lots of good resources. I have found (NCEA) similar, but much more difficult and time consuming. I was glad of my experience in England. This is a good thing and worth persevering with. But we need more resources. (Rose, teacher, Textiles, Food and Nutrition.)

There appeared to be a general sense of acceptance of the NCEA, coupled with a desire to iron out annoying administrative-type difficulties. Some people also expressed the opinion that a lot of the hardest work – learning about the NCEA – was behind them and that they felt excited about moving forward:

Yes it did increase our workloads, especially at first, because of the newness. But it's getting easier now, we're used to it and it's what the community wants. We can start to use it in more creative ways, to benefit the kids, especially in English and Drama, it's much easier, maybe than in other subjects. (Emily, English and Drama teacher)

## **Strategies for effective work management**

Management duties at Gladstone High School were allocated, as in many high schools, chiefly in the areas of student management and curriculum management ('Deans and tutors, HODs). The senior management team oversaw this allocation and staff had input to decision making through a committee structure. The Principal and senior managers provided strong support to staff and maintained an 'open door' policy. They protected staff from unnecessary work by 'filtering out' tasks they saw as low priority. They also played a major 'hands on' role in managing student behaviour by spending considerable amounts of time with individual students who were experiencing difficulties of various kinds and liaising with relevant people from inside and outside the school (e.g. the School Counsellor, welfare and guidance agencies) and parents.

Teachers and Middle Managers at Gladstone High School said that they felt that they were managing their own workloads reasonably well. They had developed individual strategies, e.g. working at times that suited them, prioritising work, limiting the amount of marking they took home, choosing not to take on too much extra curricular work. The demands of the NCEA were making some inroads on this kind of flexibility, but teachers and middle managers were developing new strategies to manage NCEA work. As they grew to understand the NCEA better, they were prioritising the related tasks more efficiently, and learning to select and use support materials.

An important whole school strategy for managing teacher workload at Gladstone High School is to build the teachers' capacity to work efficiently and effectively as collaborative and collegiate professionals. This is being achieved through a carefully constructed and implemented professional development structure that is linked to performance review and aligned with a whole school vision. The teachers and middle managers said that they appreciated the professional development and believed that their learning helped them to manage their own workloads more effectively and efficiently. They agreed that one very important aspect was the emphasis on building teachers' ICT skills and ensuring the availability of necessary ICT resources. No person interviewed saw the time spent on this, or any other, PD as wasted.

## **Summary**

Gladstone High School was observed to be a strongly led school with well-developed systems for teachers' professional learning and high levels of professional community and teamwork. The school has a sound management and governance structure that is characterised by excellent relationships between various individuals and groups, and efficient systems' monitoring. Teachers, led by senior and middle managers, work in subject department and cross-faculty professional learning groups and teams, whose goals are strongly aligned with the total school vision. The overall structure is focused on teaching and learning objectives. There appears to be little or no duplication of effort.

The teachers and middle managers who were interviewed for the study said that they usually felt in control of their work. They saw themselves, not just the school, as responsible for managing their workloads. This could be a result of the extensive

professional development and performance review/accountability requirements, that encouraged professional responsibility and initiative.

Student behaviour management was an issue that affected teachers' perceptions of their workloads as 'heavy'. Dealing with misbehaving students took up much of the time of all teachers and middle managers interviewed, especially Deans and Tutors, It also demanded a lot of time and effort from senior managers and the Principal. One suggestion was to provide middle managers with more clerical and administrative assistance (e.g.following up absences, lateness etc.)

Teachers and middle managers believed the school to be well resourced. Lack of resources (apart from time) was not perceived as an issue that increased workloads at Gladstone High School

Teachers and middle managers interviewed felt that the strong leadership, shared vision, supportive collegiate culture and emphasis on professional learning were positive influences on their workloads. They did not believe that 'extra' time spent working in professional learning teams and groups was excessive or unreasonable, because it was linked to their core work with students. They were also very appreciative of the advanced ICT training they had received and of the school's heavy investment in ICT. They believed that their use of ICT empowered them to manage their workloads more efficiently and effectively.

Performance management/appraisal was not seen as an imposition from 'outside', but as reasonable and necessary, because of links with accountability and professional development. However, Middle Managers, who observed teachers' work in the classroom, said that they had difficulty organising time for the observations. They were also anxious to keep associated 'paperwork' to a minimum.

Teachers and middle managers agreed that the NCEA was the chief contributor to workload increases in recent years. All said that they found the NCEA requirements very demanding. This was especially true of HODs, who were required to provide leadership for their staff and locate and develop curriculum and resources. There appeared to be a general feeling, however, that NCEA workloads were becoming more manageable as teachers grew more accustomed to the requirements. Their main 'requests' in relation to the NCEA were for less associated 'paperwork' and more and better resources. All people interviewed showed an excellent understanding of the NCEA and its underlying principles, and all were philosophically in favour of it.

The school's ERO report in 2004 was very favourable. However, tackling the areas of suggested improvement – better catering for student diversity in classrooms, improved assessment practices, and more targeted and strategic use of student assessment data - is likely to increase the workloads of teachers and middle managers, especially HODs, in the future.

## **Case Study: Padua College**

### **School Profile**

Padua College is a state integrated all girls secondary college located in a major city. The school was first registered as a College in the 1920s and was integrated into the State education system in the 1980s. The present Principal is the first lay Principal in the school's history.

The current enrolment is 600 students, and this figure is capped because of the physical size of the grounds.

### **Methodology for the case study**

The interviews for this study were conducted at the school, in various locations, classrooms, teacher staff rooms and the Principal's office, on the 2<sup>nd</sup> September 2004.

The following members of the school community were interviewed:

- the principal,
- the assistant principal,
- a member of the Board of Trustees,
- four teaching staff, three of whom were also Heads of Departments (HODs)

The school was chosen as a case study school because it provided an example of a school guided by strong religious and ethical values. We were interested in the impact of this culture on teachers' workload.

The sample of teachers to be interviewed was selected with input from the principal, following a written request and telephone conversations and a plain language statement that set out the aims of the project.

The general tone of the interviews with all staff was positive. All staff interviewed including the Board of Trustee member appeared willing and open in their comments.

## Documents

The Staff Handbook, which was a comprehensive and regularly updated document, was provided. This was given to all new staff and was approximately 90 pages. It covers all aspects of the school, from a 'Brief History' to 'Frequently Used Forms'. The comprehensiveness of this document would indicate that it has been put together with a great deal of thought.

The Assistant Principal supplied a copy of the 'Behaviour Policy'. This was a one-page document in clear and simple language that was handed to all students. It was also displayed in all classrooms.

## Managing teachers' work.

All qualified teachers at Padua teach, including the Principal, Deputy Principal and Assistant Principal.

The school has a 5 period day – 25 periods per week. A full teaching load is 21 teaching periods per week.

The teachers interviewed, their teaching load, preparation and marking time, subjects, year levels and a brief comment about when they do out of hours work, is shown in the table below:

*Table 3: Padua College Scheduled duties*

Teacher	Subjects taught	Year levels taught	Weekly contact hours	Weekly prep/marketing time	Management Time	Total no. of hours weekly	Comments
Principal	Religious Education	13	6	unknown	50	60 +	extra work with NCEA
Assistant Principal	Chemistry	12, 13	12	12	30	50 +	After school and weekends (Sunday pm)
HOD Soc Science	History	11, 12, 13	12	10	30	50 +	Evenings/weekends At school by 7 am during term
HOD Food Technology	Food Tech Hospitality	9, 10, 11, 12, 13	19	18	13	50 +	Evenings /weekends
HOD Music	Music English Singing	9, 10, 11, 12, 13	20	5	15	40	Any/all prep done at school. 2 very young children at home
Teacher	Religious Ed Maths	9, 10, 11, 12, 13	21	15	15	50 +	Evenings/weekends

Padua had a very comprehensive Staff Handbook, which listed College Procedures, and Staff Responsibilities. Under Staff Responsibilities, there is a specific title and list of duties for the NCEA Co-ordinator, Deans, the HODs and the Subject Teachers.

The handbook also listed a meeting schedule, which was adhered to and the Principal advised that teachers were expected to work in teams. This helped to provide collegial support as well as a channel of communication through HODs to the Senior Management Team.

The Assistant Principal received 5 management units (MUs), and a total time allowance of 13 periods. His main area of responsibility was Pastoral Care.

The Deputy Principal's area of responsibility revolved around the academic side of the school, specifically the NCEA Co-ordination and implementation. The Deputy Principal was not available for interview, and the Principal advised that she had intentionally left the Deputy Principal off the interview list because her workload was so demanding.

The HOD (Social Science) received 3 MUs and a total time allowance of 13 periods. He advised that he is a member of the Senior Management Team of the school, and also the IT Co-ordinator. He also coached cricket, athletics and soccer, was involved in the Duke of Edinburgh Awards, co-ordinated the school production and overseas school study tours. This teacher received a greater time allowance because of his involvement in such a diverse range of school activities.

The HOD (Food Technology) received 2 MUs and had 2 periods time allowance. This teacher was involved in school extra curricular activities with the students relating to Food Technology, e.g. 'Cook of the Year'.

The HOD (Music) received 1 MU and a 1 period time allowance. Her participation in extra curricular activities was limited by family commitments. She had 3 choir rehearsals each week, held during the lunch break. This teacher advised that she was having great difficulty coping with the demands of a young family and a full teacher load.

There was a clear hierarchical 'management' structure, with a Principal, Assistant Principal, Deputy Principal, year level Deans and HODs. The regular meetings provided opportunities for collegial working together, and the Principal recently instigated fortnightly Staff Development Time, from 8 a.m. – 10 a.m. on Thursday. All teachers, including the Principal, participated, and the school timetable had been altered to accommodate this initiative.

The expectations for teachers were very clearly outlined in the Staff Manual, both for pastoral and academic procedures. These were listed under the general heading of Staff Responsibilities, then the four categories of teaching staff:

- NCEA Co-ordinator
- Dean
- Head of Department and Teachers in Charge
- Subject Teachers

The information provided was quite specific. For example, under the section for 'Head of Department and Teachers in Charge' were listed twelve responsibilities and the first read: *'Preparing courses of work which will provide students with an opportunity to gain NCEA credits.'*

The teachers and middle managers interviewed were all experienced teachers and seemed to be very clear about what was expected of them in their given positions. One teacher had been teaching for twelve years, prior to that she had been a social worker in the prison system. The remaining teachers each had at least twenty years teaching experience. All teachers stated they had no problems with classroom management, or control of the students, either inside or outside of the class.

Their concern with meeting expectations and requirements related strongly to the NCEA, which they felt had not been communicated to the schools adequately. One teacher stated that the History component for the NCEA was 15 pages long, and commented that despite the fact that he had 25 years teaching experience, he still had difficulty unpacking it and questioned how students could be expected to do the same.

### **Overall perceptions of workload**

The teachers and middle managers all perceived their workload as heavy. This was in contrast to the Assistant Principal who perceived his workload as good and manageable. Two of the teachers felt the workload had increased enormously over the last 2 – 3 years, and a couple also felt that the load was unreasonable, but *'that was just how teaching was'*. They used words such as 'overwhelming', 'burdensome' and 'pressured' to describe their workload.

Two teachers mentioned illness, and believed this was a direct result of the workload pressures. One teacher with 25 years experience advised that he was diagnosed with dangerously high blood pressure twelve months ago. He said that given his age, (late forties) he was very concerned, and has taken steps to improve his workload situation, such as leaving school at 4.30, instead of 7pm, and working only half a day at the weekend.

Two female teachers, and the Principal stated they could only put the required hours into their jobs because they did not have young families. The one female teacher with young children stated that her teaching was suffering because she did not have enough time, due to domestic demands, to prepare lessons and complete necessary administration tasks. The general opinion was that teaching required a ten-hour working day, with some weekend work as well.

## **Factors that affected workload**

### ***Student behaviour management/pastoral care***

All teachers stated that managing student behaviour was not a workload issue at Padua. They said that they had no problems with 'control' of the students, and that a supportive and workable discipline policy was in place.

The Assistant Principal spoke at some length about Pastoral Care in the school and the importance placed upon every student's needs. He is currently involved with a study that involves tracking Pasifika and Maori students to see how best to meet their needs.

One teacher had a student in her form group and classes who suffered from Asperger's syndrome. Dealing with, and teaching, this student took disproportionate amounts of time. The Principal had also spent a significant amount of time in various meetings concerning this student. Another teacher/middle manager commented on the numbers of students she taught – 160 – and the difficulty that that created in getting to know them as individuals. The HOD (Music) stated that she believes that teachers should be given some time when they were 'untouchable' (i.e. unavailable to students). She also commented that as she has no 'teacher' staff room her working area is in the music room, a space in which she was constantly interrupted.

### ***Time and meetings***

Four teachers identified 'time', especially 'time spent in meetings' as a problem. (*'Time available is totally insufficient for tasks requested.'* *'Too much time is spent in meetings.'*). They commented their belief that some sort of sifting process should be put into place to save people attending meetings that were not relevant.

### ***The NCEA***

The Principal said that the NCEA had created a lot of extra work for teachers, but she had assigned responsibility for the overall implementation of NCEA to the Deputy Principal who she stated was a capable, efficient and very competent staff member.

Interviewees said that the NCEA had a major impact on their workloads. They used words like 'incredible', 'huge' and 'terrific' to describe its impact. Interestingly, the Assistant Principal saw the NCEA as 'good', 'positive' and 'manageable'. But, as noted previously, the Deputy, not the Assistant Principal, is responsible for NCEA in the school, and the Principal advised that the NCEA workload of the Deputy Principal is 'overwhelming.'

The teachers and middle managers saw the NCEA as having been poorly implemented. All teachers had received professional development, but feel that more is needed, especially information about how to 'bench mark' student performances. The teachers commented that not enough direction or information had been given with the NCEA. However, they do recognise that it is in its early stages, and believe that once implemented it would become more manageable.



### ***Vision and values***

The values of the people interviewed appeared to be aligned with the vision of the school, which, as expressed in the mission statement, is to provide an excellent religious education for young women. All staff members interviewed were quite clear that the vision of the school was aligned with the Sisters of Mercy values of mercy, compassion and hospitality. The overall impression was of a school with a caring environment.

One of the teachers was an 'old girl', and two of the male staff were married to 'old girls' and had attended religious boys' schools. The Staff Manual carried a two-page statement about religious values and advised teachers that even if they did not profess a particular religious belief, they were still expected to promote the religious character of the school.

### ***Resources, leadership and support***

The school was physically well resourced, but all teachers and middle managers interviewed believed that they undertook work that could be done by people other than teachers, such as, 'organisational stuff'. For example, one middle manager organised and co-ordinated school study tours and was preparing to take a study group to Europe. While she accepted responsibility for the educational aspects of the tours, she needed much more back up administrative and clerical support.

All teachers stated that they receive administrative support, but that this was not always sufficient, e.g. there were duties that could be done by someone other than a teacher. The HOD (Food Tech) suggested that help with photocopying and data entry was needed, as did the other teachers interviewed.

The Principal stated that she wanted to support her staff as much as she could. Part of that support came through introducing fortnightly professional development that did not entail another after school meeting, but was held in school time. The day I visited the school the staff had just had a PD morning and the Principal had organised scones for the teachers as a 'reward'. The Principal was very aware of the demands made upon her teaching staff and the high levels of middle manager commitment, saying that she encouraged staff to take at least one week off in the holidays. She would even tell them that the school would be locked and they couldn't get in! This seemed to indicate that the teachers were 'driving' themselves to achieve what they believed to be acceptably high standards for their work, rather than responding to external demands and pressure.

All of the teachers and middle managers interviewed felt supported at the school. They believed that the school had strong and effective leadership and they were appreciative of the Principal's understanding and efforts to lighten their workloads. The only negative comment made was to the effect that workload could be shared more evenly among all teachers and middle and senior managers.

The school appeared to be well resourced, with relatively new and well-maintained buildings.

The teachers interviewed all believed that they worked hard. However, four of them stated that long hours and weekend work were the norm for most teachers.

All teachers interviewed were very experienced, and although they stated that they worked long hours and feel burdened by the NCEA, they were comfortable at Padua and shared the values of the school – mercy, compassion and hospitality.

## **Case Study: St James School**

### **School profile**

St James School is a co-educational private school comprising junior, middle and senior schools. Total enrolment is about 1600 students, of which half are in the middle school and approximately 400 each in the junior and senior schools. St James is a decile 10 school.

The campus is beautiful, and an ongoing building program has provided excellent facilities. The core values of the school are displayed prominently throughout the campus, on the website and in the documents gathered for this research. They are:

1. determination to achieve excellence
2. willingness to be innovative
3. passion for learning
4. respect for oneself and others
5. loyalty to, and pride in, St James
6. traditional Christian values.

The school's strategic plan further articulates the school's high expectations of participation, effort and achievement in both academic and extra curricular areas.

St James School offers two qualification 'pathways', NCEA and the International Baccalaureate (IB). The school has a high expectation of extra curricular participation for both students and teachers.

### **Methodology for the case study**

Interviews for the teacher workload research were conducted at the school on the 25<sup>th</sup> August 2004. The six teachers interviewed included an assistant principal, a dean, a head of department and three classroom teachers. Four of the teachers interviewed each had over 20 years teaching experience, one had been teaching for nine years, and the sixth for four years. They had been teaching at St James for between three and ten years.

In addition, the school supplied a range of documents including individual teacher timetables, the Charter and Strategic Plan, the allocation of management units, teacher job descriptions, sections of the teachers' contract, the school prospectus and a recent issue of the quarterly school magazine.

### **The workload of teachers and middle managers**

#### ***The school structure and systems***

St James School is divided into a junior, middle and senior school, each with its own Head and senior management team. The Principal provides overall leadership. The school has clear and explicit values which are familiar to all teachers interviewed and

are well supported. Pastoral care, guidance and discipline are addressed through a dean and tutor teacher system.

Positions of responsibility are rewarded with the allocation of 'St James Units' (StJU). A StJU can either be a unit of time or a sum of money. In time, a StJU equates to one teaching spell; the monetary value of a StJU is just over half the value of a state management unit.

An assistant principal is given 14 StJUs (8 x time and 6 x money), a head of department receives 12 StJUs (6 x time and 6 x money), and a dean is entitled to 10 StJUs (6 x time and 4 x money).

Job descriptions exist for all positions, and teachers at St James School receive 12.5% more in salary than the state collective contract agreement. This additional salary brings with it the expectation that teachers will be available for two weeks of professional development out of school terms. Job descriptions are not highly prescriptive, and allow considerable flexibility in the allocation of duties. Both teacher and head of department job descriptions note that participation in activities beyond the classroom is required.

The St James Standard Employment Agreement similarly recognises that many factors impact on teacher workload, and that the job will require teachers to be flexible and outcome oriented. Under 'Hours of work' the contract states:

The parties acknowledge that the hours of work for individual teachers are influenced by factors such as the number of classes, the involvement in activities over and above the subject teaching requirements, and the administrative responsibilities of the teacher, and whether the teacher is engaged as full-time, part-time or relieving teacher.

The teacher shall generally be required to attend the School and follow the schedule of classes prescribed, attending in accordance with the School's annual calendar. Acknowledging the professional status of the teaching profession and other service professions within St James School, achievement of outcomes is emphasised rather than hours of work.

The school operates a 7-day timetable of 42 teaching spells.

### ***The workload***

Two of the three classroom teachers without positions of responsibility estimated that they worked 46 hours in an average week; the third teacher estimated she spent 48 hours working in an average week. These estimates included hours in front of a class, covering for teacher absence, in meetings, preparing and marking work, and involvement in extra curricular activities.

**Table 4: St James School scheduled duties**

Position	Subjects	Year levels	Weekly contact hours	Weekly prep and marking	Weekly management /pastoral hours	Extra curricular	Other scheduled duties
Teacher	English	9, 10, 11, 12	25	12		2	7
Teacher	Sciences	9, 11, 12, 13	25	11		2	8
AP	Technology	(7, 8) 9	10	5	21	6	0
Teacher	Technology	10, 11, 12, 13	25	10		5	8
HoD	Social sciences	9, 10, 11, 12, 13	17	7	6	10	5
Dean	English	11, 12, 13	21	18	8	2	2

The combination for each teacher was different, but for all of them the three most time consuming activities were teaching, preparing and marking work, and involvement in extra curricular activities. All three teachers reported working a standard working day, putting in some hours most or all weekday evenings, and doing a period of work at the weekend.

The Dean reported 51 hours of work in an average week, which included almost 20 hours of preparation and marking related in part to the development of new courses. The Head of Department reported working 45 hours in an average week, which included a significant extra curricular load at some times of the year. The Assistant Principal had recently managed to confine her working hours to around 44, by giving up a significant extra curricular commitment, and having been given an increased time allocation for her management responsibilities.

***Teachers' perceptions of workload***

All the teachers interviewed at St James School expressed strong commitment to the school and its values, and believed it provided a very high quality of education. They endorsed the high standards set for students, and applied similarly high standards to themselves. The three classroom teachers interviewed all felt that the pressure of workload was adversely affecting the quality of their teaching, and this caused them some distress. Two of them made these comments:

I have very high standards and I don't like to compromise them – in English, you need to give students good feedback.

I just don't get the time to develop the strategies I need to make the lessons as effective as they could be.

The teachers identified two main workload pressures that at times compromised the quality of their teaching – class size and other responsibilities.

Two of the teachers noted that increased class sizes over recent years had really compounded the workload pressure, particularly for teachers in subjects where there is a lot of marking and detailed, high quality feedback to students is required. One teacher explained that while she had taught six classes for several years, the total number of students in those classes had increased by 30% over 5 years, and that given the priority she places on detailed, high-quality, timely feedback, the increase in the number of students she teaches has significantly increased her workload.

The other responsibilities that increased teachers' workload were of three types – extra work related to the curriculum and to classroom teaching; responsibilities for resources, equipment and maintenance; and extra curricular responsibilities.

Extra work related to curriculum and classroom teaching included such things as providing individual coaching to prepare students for International Baccalaureate (IB) oral examinations, giving students opportunities to resit assessments in order to improve their results, ensuring authenticity of assessments, and administration related to NCEA.

A teacher of technology felt that he was not doing as good a job as he could be in the classroom because he had a range of related responsibilities for the technology workshop, materials and equipment that took him away from time planning his teaching. This was despite the provision of support staff to assist with equipment maintenance. He was concerned about the achievement of some students whom, he felt, should be doing better.

The school had a strong commitment to extra curricular activities and staff members were required to participate in the provision of a wide range of activities offered to students. While staff strongly supported the school's promotion of extra curricular opportunities, for a busy teacher the time this required could sometimes seem to be at the expense of reflection on, and improvement of, classroom programs.

As previously discussed, the teachers at this school had high expectations of themselves and were reluctant to offer less than the best they could. While teachers interviewed all stressed that they enjoyed their job, some acknowledged the impact their heavy workload had on their family life. These are some of their comments:

I'm in my early 50s and I want a life. I'm a dedicated teacher, I enjoy my students but I also need a life. It's not unusual; it's just the way it should be. It's something you're entitled to as a human being.

I am working harder now than I ever have before, both in the number of classes I teach and in the nature of the work. I have bigger classes, there is an expectation from the kids that the work will be marked quickly, and that's a pressure.

If you come home from work and you're emotionally drained, you're not really available to your family. I go home and I don't really feel available.

### *Middle managers' perceptions of workload*

The middle managers interviewed had a range of responsibilities. The Dean had significant pastoral care responsibilities in addition to playing a key role in the IB program. The Head of Department had responsibility for social sciences and humanities as well as being involved in ICT development and having a large extra curricular responsibility. The Assistant Principal had a wide range of administrative responsibilities in the middle school including calendar planning, duty systems, teacher cover, assemblies, uniforms, routines, and education programs out of the classroom.

Two of the middle managers interviewed considered their workloads to be very heavy, but neither regarded this as a cause for complaint. In a way that is perhaps consistent with the School's values, both saw themselves as exercising choice in the decision to put in the extra time and effort to achieve the standards they wanted. The workload pressure appears to be associated with the need these teachers felt not just to do the job required of them, but also to do it to the standard of excellence that they and other people expected. A strong ethos of individual responsibility came through from these middle managers. One said:

If I was concerned about it, I'm the sort of person who will seek out a solution to my situation. I would never blame the school or anyone else. I make the decisions.

The Head of Department had no objection to working hard, but did feel frustrated when he perceived his time was not well spent, as he thought was sometimes the case in meetings. This man also had a key role in co-ordinating cricket in the summer, and while he received some recognition for the time spent in the form of StJUs, he acknowledged that at times the pressure is enormous.

The Dean had the heaviest workload of the teachers interviewed. However, she was not unhappy about it and gained a lot of satisfaction from the energy and effort she invested in St James. She said this about her workload:

I love it, but it's open-ended, you never finish. . . . I'm not into whether or not it's fair. I love this school, and I really, really love my job, I probably could pull back but it's not a problem unless I'm really tired.

This woman also enjoyed being indispensable:

I'd never take a day off if I could help it. Because of the nature of my job there's no one to pick it up, and how you could even brief someone to do your job. I'm entitled to a sabbatical, but I'm not taking it, it's just too hard to go.

The Assistant Principal had recently made changes to her workload that had brought her considerable relief from workload pressure. She said this about the choices she had made:

There will never be the time to do all you want or need to do. You have to be strict and pace yourself. You need to be disciplined about taking time off. I've cut back on a lot of extra things I used to do, sports teams etc.

### **Factors influencing perceptions of workload**

Both teachers and middle managers were supportive of the values of the school and the emphasis on aspiration to excellence. They supported the school having high expectations and believed that teachers as well as students should work hard to meet them. This comment from one middle manager exemplified this view:

Our commitment to excellence in everything creates a sense of pressure. You can't do something second-rate in this school. That's good, but it's always going to mean your workload is open-ended.

In general, the teachers and middle managers interviewed for this research were of the view that their time was well spent and, with the exception of the technology teacher, none felt that they spent much time doing things that did not require a teacher. The school was extremely well resourced in almost all areas, and teachers had significant administrative support available to them.

There was agreement among those interviewed that the behaviour of students at the school was good, and that effective systems were in place to address any behavioural issues that arose. There was an expectation that teachers would respond within 24 hours to parents who contacted the school,. This could create additional pressure for those with pastoral care responsibilities.

The teachers feel that the NCEA had substantially added to their workload. Administration requirements, the need to ensure authenticity of work, making time for students to resit (an opportunity made available to any student who wanted to improve his or her grade), and moderation, all contributed to the increased workload. The impact of these factors was exacerbated for those teaching large classes.

St James School also offers the International Baccalaureate (IB). While some teachers mentioned the heavy workload that came with the IB, it did not seem to create the same sense of workload pressure as the NCEA. Those teachers involved with offering the IB program spoke very highly of it and the challenge it offered students. It seemed that their belief in the value of the IB program gave them a greater tolerance for the associated workload, whereas the workload associated with NCEA was not mitigated by the same confidence in that qualification.



Some teachers felt they did not have as much control over their work and workload as they would like. The two teachers who felt most overworked made these comments about control:

I'd like to say I have a lot, but I don't feel I have a lot of control. A lot of people seek promotion to get away from the pressures of the classroom, but I love being in the classroom. The school should reward senior practitioners.

I don't feel in control. At the end of a hectic teaching day it's easy to feel you haven't done well and blame yourself.

Control was also a big issue for one of the middle managers:

As a middle manager you don't have a lot of control, you're sandwiched between the needs of your staff and what comes down from above. For example, we've got a meeting this afternoon and management has decreed what the meeting must be about – but the staff have other needs.

A lack of time to prepare high quality lessons was the thing that created most stress for the teachers interviewed. These were some of their comments:

I'd like more time to prepare more dynamic ways of presenting the curriculum.

I'm a creative person but there is no time for creativity. It directly affects my teaching. I'd like to be creative, to read, go to films, and watch plays so I can be better informed, more inspiring, more creative.

During the day you might think of three or four things that you could do to improve your teaching but by the time you get the opportunity to write them down, they're gone, or you might want to talk things through with your HoD, but he's got a meeting or you've got a meeting.

Two teachers, both aged in their 50s, spoke of the pressure that information technology put on them. While they strongly supported the use of ICT they did not have the time they needed to become confident with using the technology:

Technology changes have meant we have had to upskill ourselves and that has put its own set of pressures into our jobs and things that used to be done for us we now do ourselves. . .and you daren't not . . . .you need to keep a step ahead.

I find it stressful. I'm not very IT savvy and yet I'm expected to use it all the time. I don't have the time to spend improving my skills so I find it hard.

The school does have an IT trainer on call to staff. This person will come and spend one-to-one time with teachers helping them to do the things they need to do and will

email follow-up instructions in an easily understood format. However, even this assistance has not helped teachers build their confidence with technology in the same way as they believe would result from more time available to practice their skills.

Even one teacher, who is very computer literate, is reluctant to use ICT in teaching:

Whatever your skill level it never seems to be enough to solve the problems presented to you through a sophisticated network system. If you are brave enough to bring it into the classroom you have problems with old laptops, student passwords, network problems, using new software on old laptops. It's potentially hugely useful, but logistically very difficult to get it to work.

### **Strategies for effective workload management**

Most of the teachers and middle managers interviewed saw their workload as being something they needed to manage themselves, and they were not looking to the school for solutions. Individual strategies for managing workload included many hours of work beyond the standard working day, during the weekends and between school terms. Teachers often prioritised work above family and social occasions. Despite this commitment to self-management, those with full-time teaching loads did make a strong plea for more non-contact time in which to improve the quality of their teaching.

The school had a deliberate policy of keeping to a minimum the number of meetings that staff members have to attend. There was a meeting each Monday afternoon, which could be a whole school meeting, or have a departmental or professional development focus.

St James School rewarded teachers by paying above the rates determined through the teachers' collective contract. The staff interviewed had respect for the management of the school and most felt that senior management was accessible and that they listened to staff concerns, although change did not necessarily result.

The allocation of StJUs, which were comparable to management units, was through a very transparent process and staff members were able to indicate whether they wanted to take the entitlement that went with positions of responsibility as release time, money or a combination of both. Teachers and middle managers appreciated the opportunity to be involved in this decision.

Most teachers showed a strong sense of professional identity. Professional development budgets were generous, and staff members were encouraged to identify professional development needs and meet them. However, some teachers speculated that a commitment to keep to a minimum the number of meetings teachers have to attend, had come at some cost to a sense of professional community.

### **Summary and conclusions**

Staff members interviewed at St James School expected to work very hard and were committed to doing so. To a large extent, teachers and middle managers saw the

heavy workload as consistent with one of the core values of the school – determination to achieve excellence.

In general, middle managers accepted that the decision to work hard was one for which they took responsibility, and they did not look to the school for relief from their workload. They acknowledged that the environment and the pressure to perform was both demanding and satisfying at the same time.

The classroom teachers expressed more feelings of workload stress and less satisfaction than the middle managers. This seemed to be due to the fact that in the classroom they were constantly confronted with ways in which their teaching programs could be improved, but lacked the time to do what was required to implement the improvements.

Most teachers felt very well supported by the school. The support offered included additional remuneration, good resources, effective management, administrative assistance, access to professional development, and support from senior management.

## Case Study: Te Kura o Te Ra

### School Profile

Te Kura o Te Ra is a small rural school in New Zealand. The school curriculum, with the exception of English classes, is taught in Maori.

The Principal described the school as 'an island in the middle of nowhere - a total immersion island.' At its inception it was 'a major experiment.' It was founded in part as a response to the danger of the Maori language disappearing. In some families there have been two generations without Maori language in the home. The school is separated into different wings. English can be spoken in the administrative wing and there is also an English-speaking room. Maori is spoken in all other areas of the school. All staff members are fully bilingual.

Parents are closely involved with their children's school. The school has a Board of Trustees, but all parents have equal status at whanau Board of Trustees meetings.

The school follows national curriculum guidelines and has an enrolment of about 60 students at primary and secondary level, with enrolments increasing. The school also mentors four kura teina, similarly constituted schools.

The school is in a highly attractive setting, with the school buildings carefully laid out in relationship to other community buildings. Buildings and grounds are beautifully maintained and a clear source of pride to the community. The school does not have a staffroom as such, although there is a resource area where teachers and students work. This is where one teacher, for instance, assesses incoming students. Generally speaking, the school's physical environment is a positive factor in teachers' perceptions of workload.

### Methodology for the case study

The school was visited on Thursday 19<sup>th</sup> of August 2004. Four separate interviews were conducted over approximately seven hours.

The following school personnel were interviewed:

- David, Principal
- Hannah , Languages (Maori and English)
- Maata, (.8) Correspondence and Administrative Duties
- Moana, (.2) Art

**Principal David** moved into the position relatively recently . He paid tribute to the previous Principal for establishing many of the school's systems. There was, he said, a high level of intercollegial discussion, professional collegiality and shared responsibility. The School Charter, in outlining the strengths of the school, observed:

There is a lean administration system in operation at the kura, despite the demands placed upon the kura in mentoring the 4 kura teina.

**Hannah** taught in both the primary and secondary division of the school. She had a teaching allotment of 20 x 45 minute periods. She was also responsible for the operation of the primary school and for Maori and English language teaching. In addition, she conducted assessments for new entrants to the school and supervised Massey University Papers. Hannah also supervised a one hour homework group as well as supervising students in the playground every day for five weeks out of six. About once a week she also covered a relief period at primary level. Twice a week she attended a primary and a post-primary meeting, which ran from 3 to 5 p.m. Hannah estimated that she would spend between ten and twelve hours per week, on average, in preparation and marking.

**Maata** supervised all correspondence courses between Years 9 and 13, for which she received an allowance of seven periods. In addition, she entered all NCEA data and carried out various other administrative tasks. She also supervised a one hour homework class three times a week and attended school meetings.

**Moana** taught Art to all levels of the secondary school, teaching five periods over two mornings. She occasionally covered a relief class and attended school meetings, although this was not compulsory on her time fraction. She would spend two hours a night over three nights in assessing students' work, sometimes needing an entire day or an all night session for NCEA work.

Staff members spent many hours each week in the translation of various materials into the Maori language.

It was very difficult to quantify the number of hours worked in this school, as the school and the community were so intertwined. While rural schools may often have stronger local community links than urban schools, this school was exceptionally strong in this respect. There were no clear lines between duty and personal commitment. There was also an extensive degree of shared responsibility and participation. Personal commitment and shared responsibility appeared to be outstanding strengths of the school.

## **Documents**

The following comprehensive documents were provided by the school:

- Te Purongo a Tau me nga Tauaki Kaute Putea (*Annual Report and Financial Statements*)
- Te Tutohinga – Te Mahere Rautaki – Te Mahere A Tau (*Charter – Strategic Plan – Annual Plan*)

## **Teachers' Perceptions of their Workload and the Critical Factors which contribute to these links.**

This case study does not distinguish between teachers and middle managers, given the small size of the school and the degree of shared responsibility and intercollegial operation.

Teachers at this school perceived their workload as increasingly demanding, particularly since the introduction of the NCEA.

Some of the issues that contributed to this perception were, to varying degrees, common to all schools visited by this researcher. They contributed in various ways at different schools to both positive and negative perceptions of workload. These issues included: pastoral care and behaviour management; resources and environment; government initiatives; participation in decision making; the time factor; leadership connection to teaching and learning issues; professional development and professional learning community; ICT; and the concept of a shared vision.

A major and ongoing issue at this school was the scarcity of appropriate Maori language resources, although this had improved in recent years. Another major issue was the need for teachers to translate so much material themselves, particularly NCEA related materials. Other issues that increased workload were those common to small rural schools, such as a smaller number of staff to develop materials for each year level, and the distance factor in accessing professional development and in liaising with other educators. Major positive factors in the school were shared vision and shared responsibility.

### **Pastoral Care/Behaviour Management**

Principal David described the school as 'a close knit group'. He said that parents were seen immediately and directly if a problem arose. Collective strategies were used to deal with issues. There were no suspensions or expulsions. 'We'll get them in a nice way', the Principal said, 'guide them.' Parents, grandparents and siblings were all part of the community. Nevertheless, some of the serious issues in the outside community were impacting on the school. For example, they recently had the first instance in ten years of student truancy.

Another interviewee stated that behaviour management issues seemed to have increased somewhat and that this could add to stress levels. The first group of students who went through the school were very much aware that it was 'an honour and a privilege', although resources were fewer. The Principal said that he worked very hard with students on behaviour issues and was supportive of staff. There was he added, 'extensive discussion with teachers.'

Interviewee Maata had very high expectations of the children with regard to behaviour issues and would like cooperation to improve. As an indication of her occasional disappointment, she recently told a group of them that it 'was just like being at .....High School!' However, she said that what she was doing and achieving here was something that she had wanted to do for ten years at her previous school. Behaviour management did not seem to be a major issue in this close knit community. Maata noted, 'I know of no teacher who has left here through stress; they are dedicated to the school - it is important to the future of our people.' Only one teacher had resigned, a decision based on his belief that he 'couldn't do well enough by the children' due to insufficient fluency in Maori. Maata said that teachers may be stressed or have 'the wearied look', they may be 'not smiling, grumpy' but what would relieve their stress was not necessarily related to behaviour management, but

rather a need for more resources and more translation, particularly in the secondary area. Hannah stated that behavioural management was 'not an issue' and that student teachers commented on the politeness of the students. Moana added that pastoral care for all students was part of the whanau - 'We treat them as our own kids.'

Behaviour management did not seem to be an issue contributing to perceptions of workload at the school, in spite of the very high standards that were clearly expected.

## **Resources, Environment**

David described the need for Maori language resources as a significant factor impacting on the school and teacher workloads, although he said that the situation had improved markedly. There had been a lot of 'reciprocated support' he said [from] some 'wonderful people' in the Ministry, which he described as 'part of the success story.'

In 1993 the only resource for senior students was the Bible, which was used extensively. Other materials, such as small journals, were eagerly sought out by students but were finished within an hour. Students were 'hungry for books' and relaxed when they knew more books were coming. They were 'starving at a cognitive level.' David wrote many of the textbooks himself at that time. When the maths texts were trialled, 'not one child left the classroom for an entire day.' David described the provision of appropriate resources as 'one of the best ways of reducing the burden - particularly during weekends and holidays.' Improvements had seen the school go from one box of resource material in 1994 to a whole room. Nevertheless, this was 'probably about one tenth of what is needed.' Appropriate resources also made it much easier for relief teachers to work effectively. As David said:

If resources could be tripled overnight, this would reduce the workload substantially, particularly at secondary level.

Some materials were being centrally produced but 'too slowly.' An insufficient pool of Maori-speaking relief teachers was another factor which impacted on workload.

A major contribution to workload in this school was the need for all NCEA material to be translated into Maori. Teachers were currently doing this translation themselves, which was very time-consuming. For example, all program delivery for the Unit Standard in Maths needed to be in Maori. The only material that could be downloaded from the web in Maori was the material related to Maori language. The Principal believed that the school needed more people to be employed at a central level as writers and translators to ensure quality translation, and that there should be a Maori/English national approach. Availability of Maori language NCEA material would be in keeping with the principles of the Treaty of Waitangi.

Art teacher Moana raised the lack of materials and books in Maori as a major issue. For her subject area, she explained, there was only one book. At the top end of the senior school, this deficiency greatly increased workload. Total immersion students needed to be taught up to standard in the subject with a 'huge amount of time' being invested in research and preparation and translation of material.

Hannah also stated that the production of appropriate materials resulted in increased workload. Translation into Maori of appropriate texts such as ‘Harry Potter’ and ‘Lord of the Rings’ would be a major help. However, on the positive side, the school’s class sizes were ‘a big factor in keeping workload down.’ The school was resourced for one teacher for every fifteen students, but the School Board had decided to arrange finances to ensure class sizes of twelve .

Furthermore, resourcing in terms of support staff did not appear to present difficulties, as the Principal stated:

[the school is] very fortunate, very blessed...We have quality staff and ancillary staff, and a wonderful relationship with the whanau. All support staff are Maori speaking.

While the physical environment and staffing levels of the school were very positive factors, a major resource deficiency was the ever present need for translated materials.

### **Government Initiatives**

David commented that initiatives such as ‘Tomorrow’s Schools’ were introduced at an optimum time for this school. Schools were given the opportunity to create their own charter and identity. The school had ‘a protected environment’. It ‘grew up with the Ministry.’ Five similar schools were funded in one year, with others coming in much later.

David said that the NCEA was ‘a huge burden’, but that the school was ‘totally engaged...Everything here is new, so we grab it and run. We take it warts and all.’ The workload for teachers had increased, he said, because of the paperwork involved, particularly in moderation and assessment. Teachers also needed up-skilling in various delivery modes. Although the school had small numbers, the same amount of preparation by NCEA teachers was needed. This had made its implementation more onerous. The school was mentoring other schools anyway, but the NCEA had certainly increased the workload here. David said that teachers had ‘borne the brunt of incredible educational change, even though this may be overall for the better.’ However, with so much documentation and paperwork, it could sometimes seem as if ‘the fun has gone out of education.’

Te Kura was managing the accreditation for all five Kaupapa schools in its cluster. Extensive training and professional development were needed. Some of these schools were a two hour drive away. As a consequence, time and travel had certainly added to workload pressures.

Hannah found that music at NCEA level gave her a good insight into the workings of the system. She had also been assisted by appropriate professional development. However, the amount of associated paperwork was a problem: ‘They’re always wanting evidence, evidence, evidence!’ Assessments were also more complicated, but the school was moderating anyway because of its mentoring of other Kura.. Again, a serious workload issue was the need to translate everything into Maori. Nonetheless,



the implementation had become easier as systems were established through trial and error. Hannah stated:

It's got to get easier! Once sound and robust systems are in place I can't see how it won't be easier.

Moana believed that in her subject area there were problems with NCEA professional development, which, in her opinion, was 'not as appropriate as it could be.' 'It did not, she believed, allow as much as it could for 'the Maori way of doing things' and was 'sometimes in conflict [with it].'

A product from a Maori child might have a very different cultural perspective. For example, a piece of weaving would involve the entire process. As a specific example, a Maori student placed a small tattoo on a face in a piece of work relating to cubism. The moderator found the student had not identified with cubism, whereas a Maori teacher would have understood why the tattoo was necessary. Markers in the NCEA come from a wide variety of backgrounds and 'they don't always understand the kind of thinking at Te Kura' This is important at senior levels.

Moana provided another one or two similar examples and said that these issues 'stressed teachers out.'

Increased paperwork, the need to translate NCEA materials and, sometimes, misunderstandings about Maori cultural needs and values were described as factors adding to NCEA workload.

### ***Participation in Decision-making***

At this school the families made the main decisions. *Whanau hui* (gathering) met once a month. Various strategies were decided after discussion. Other *ohu* (groups) met weekly. David said that most Maori parents would not approach state schools, but that anyone not happy about something in this school went straight to the Principal, either at the school or at his house. Many of the teachers had children at the school, and parents felt that 'they own and run the school'. For example, parents decided that they wanted the study of English to be included in the school's NCEA despite the fact that the language requirement was met by the study of Maori.

Maata came to Te Kura from a school which she felt had far too many meetings. Rather than being 'onwards and upwards' they were in fact 'going round in circles.' At Te Kura, on the other hand, she said, meetings were far less rigid. They were much more informal and much more 'at the grassroots level'. At the Board of Trustees meetings, the parents were the ones making the decisions.

According to Hannah meetings were specific, valuable and productive and kept her in touch with what was happening. The contact with other staff helped to ease the workload in the classroom. With regard to allocation of classes, Hannah commented that staff members did not 'have the luxury' of doing this and that she herself taught children at all levels. She said that she had always had multi-level classes and had no

preference as to level. She used to assume all teachers could teach at all levels and thought that teachers from mainstream schools would be more uneasy with this situation.

Teachers at the school appeared happy to participate in productive meetings connected to the learning of their students. Meetings and allocation of classes at the school did not appear to be issues contributing to perceptions of workload. There was a high degree of participatory decision-making.

## Time

At this school, the staff, the parents and the community appeared to be intermeshed, so much so that 'personal time' was very often also 'professional time.' The entire community, for example, would attend a tangi (funeral) at the marae (meeting house.) Participation by staff in these events was both a community expectation and a personal wish. Such events would sometimes occur out of school hours and sometimes during school hours, in which case work would have to be made up in one way or another. Maata commented 'I see teachers arrive in the dark and leave in the dark.'

Te Kura also conducted a number of 'sleepovers' during the year, where teachers stayed all night at the school. This was in keeping with kapa haka practices:

Teachers are involved in the students' everyday life - this has to happen because of the way whanau works.

Teachers also conducted out-of-school activities such as horse treks, during which Maori was always spoken.

Much of the time spent with students at this school was not listed as part of the workload, or, apparently, seen as such. It was mentioned in passing that 'everyone eats with the children at lunchtime' but not in response to questions about allotted duties. At lunchtime, said Hannah, 'I become whaea (aunt) Hannah. The children feel more comfortable in that environment.'

Distance was mentioned by Moana as a time factor for this and other rural schools. To see a specialist art person or colleague, she might have to travel several hours.

However, the large number of out-of-school hours spent with the community was not seen as impacting unreasonably on workload.

## **Leadership connection to teaching and Learning Issues**

David provided much of the Maori resource material for various subjects and was clearly connected to the teaching/learning process. He described Maori pedagogy as 'values based' and mainstream pedagogy as more 'curriculum based'. He described these systems as not mutually exclusive and hoped there would be a 'happy marriage.' He said that the school had been very fortunate in its quality teaching and ancillary staff and in the teaching and learning systems put in place by the previous Principal.

As Principal, David regularly visited all classrooms and was aware of curriculum content. David and Hannah met once a week and discussed classroom and curriculum related issues.

The interconnectedness of school leadership and staff on curriculum appeared to impact positively on teachers' perceptions of workload.

## **Professional development and professional learning community**

All staff members were encouraged to undertake extensive professional development, including in ICT, which was made a high priority by the previous Principal. Moana commented that 'teachers here attend anything and everything!'

For Maata, professional development and community were very important, particularly with regard to Maori issues. In her previous school, she felt she was always 'fighting the system.' This strong perception of a lack of appropriate professional development and understanding, together with being one of only two Maori teachers in the school, had clearly added to her levels of stress and to her workload. Maata's perception of workload is consequently now much more positive.

Te Kura had a carefully planned professional development program. The previous Principal was 'very into ICT', Hannah said, and all staff undertook the relevant professional development. After staff discussions, professional development was planned in term blocks the year before, thus helping to reduce workload through 'a clear indication of where you're going and what you should be doing.'

## **ICT**

David stated that ICT had worked well in the school and had 'reduced the workload enormously.' All staff members had laptops and 'we are going where the government wants us to go.'

Maata commented that ICT had created extra needs for professional development but that this had 'enabled children to have more subjects.' This was very important for this school, which was constantly trying to extend the options and horizons of its students. She also commented that a full-time ICT technician would be useful.

Hannah said that ICT had a positive effect on workload because there was 'not so much pen and paper.' It was used extensively in the school. It was also essential for

some subjects that were being taught by video-conferencing or correspondence, and for communication with the cluster schools.

Moana saw ICT as having helped considerably in reducing workload. In her classes she could use computers in a variety of ways to produce 'interesting, stimulating, exciting things.'

Appropriate PD and the appropriate use of ICT impacted positively on teachers' perception of workload.

### **Shared Vision**

This school had a clear shared vision. The Principal pointed out that when it first began classes, people needed to be very committed. There were no fees and no books. 'These people were here when there was no money.' It was 'a huge expense' for them to get training, and the time taught without formal qualifications had not been recognised. Recognition and acknowledgment of their prior service and efforts in this school would be a very positive factor for these teachers.

Hannah felt that the pressures of workload were being increased for teachers because of the need for more schools of this kind to be established. There was not enough room at this school to take too many extra students and it would be detrimental to the school if this were to happen. But the inability to meet these needs was a constant source of stress for the school community. These schools were, said Hannah, 'the last bastion for the customs, protocols and culture' of the Maori people. Together with the marae they cover spiritual, physical and educational needs.'

Maata stated that the whole whanau was working towards the shared vision of the school. For members of the community, the children were a symbol of progress - 'it touches a chord in their hearts.'

With regard to the shared vision, Hannah said, 'at the end of the day, that's what keeps you going.' Parents who might not be from a Maori-speaking background, or who may not be academic, were very happy, she said to see children at secondary level in the school.

### **Conclusion and Exemplary Strategies**

The shared vision of this school and its commitment to its values and mission statement had a very clear and positive impact on teachers' perception of their workload and were an impressive and major strength of the school. Teachers might see their workload as heavy, but when their efforts were directed towards the welfare of the school and its community, they did not see it as unreasonable. A further consequence of a vision which was clearly and genuinely shared by all members of the school community was that behaviour management ceased to be an issue in teachers' perception of workload.

The need to translate all materials was, however, a major and continuing contributor to excessive workload and teachers' perceptions of it being unreasonable. This was particularly so with NCEA materials. As in other schools, increased paperwork for the

NCEA was seen as contributing to a heavy workload, but the school seemed to be very willing to embrace innovation despite this kind of increase. The special problems faced by small and/or rural schools (such as a limited number of people to do a large number of tasks, as well as the distance factor) were also seen to contribute to the perception of workload. However, the overriding issue was the time and energy spent in translating NCEA and other materials. This was a time-consuming and demanding task that could be completed by people other than teachers.

Exemplary practices at this school included its commitment to professional development, the involvement of all staff in the teaching and learning process, professional collegiality and the direct connection of the leadership in these areas, and the extensive use of ICT. Shared responsibility and the participation of the school community in the decision making process were , for this school, other clear factors which had a positive impact on teachers' perceptions of their workload.

## **Case Study: West Island Area School**

### **School profile**

West Island Area School is located in a small rural community nearly 100 km from the nearest sizeable city. The school currently has 284 students, with 6 primary teachers and 18 other teachers and caters for students from Years 1 to 15. The community and school share the library and sporting facilities. A June 2003 Education Review Office (ERO) report stated that the ethnic composition of the school was 87% Pakeha, 11% Maori and 2% other.

Originally established as a primary school in 1896, the school converted to a District High School in 1960, and was then established as an Area School in 1977. The principal was concerned to make it clear that Area Schools are a special group of schools in NZ. They are usually based in small towns and draw students from a wide geographical area, many of whom travel considerable distances by bus each day. Teachers who work in Area Schools are employed under a separate collective agreement from those of primary and secondary schools. And, whereas secondary schools already had Boards of Governors before the Picot reforms, Area Schools only had Committees of Management.

A significant proportion of students from West Island Area School transfer to larger schools in the city to complete their secondary education. Although rated a decile 8 school, this movement means that the rating is not necessarily an accurate reflection of the social composition of the community. In the principal's words,

In this school you have two distinct social classes – the landed gentry with high expectations of schools and ready to transfer their children to city schools – and the children of itinerant worker families, whose parents either can't afford to send them to the city – the itinerant workers, shearers etc - with them come all the academic and social problems. I've got one boy who has attended 17 schools in ten years. So, you are left with those in the higher grades.

The ERO report for 2003 states that students at Year 11 generally achieved as well as or better than students in schools similar in decile and type, although the low numbers continuing to Level 2 and Bursary Level qualifications made comparisons difficult. In previous years the ERO reviewers had found the school "wanting", but this year (2004) the reviewers gave the school a clean bill of health. The school was currently immersed in a two-year anti-bullying program, supported by the Ministry of Education.

Also operating under the umbrella of West Island Area School is an Academy, which offers NZQA accredited courses working towards National Certificates open to year 12 and 13 students and adults.

## Data gathering

Interviews were conducted late in August 2004 with the following staff members:

Ian Adams	Principal
Luke Schrieber	Board of Trustees
Colin Gronn	Head of the Essential Learning Area Technology Years 0-13 and classroom teacher
Dawn Meadow	Head of Essential Learning Area Science, Head of Middle School and classroom teacher
Betty Reimer	Deputy principal and classroom teacher
Jessie Chapman	Head of Senior School, careers teachers, I/C Community Education, Head of Hurunui Academy,

Documents were also collected during the day long visit to the school including:

- The 2003 Education Review Report on the school
- Job Descriptions for each staff member interviewed
- Teaching allotments for each staff member
- School Newsletters

## Area schools and workload

Ian Adams, the principal of West Island Area School, is a strong advocate for the special needs of Area schools and believes many of the workload issues in the school stemmed from its small size. He has been at the school for about five years. He described his own workload “as almost intolerable.” A man with 40 years of teaching experience in several countries, who has “never baulked at work”, he now feels highly frustrated and “like a rat in one of those wheels that never seem to get anywhere. . . I enjoy my job, but I just can’t get on top of it.”

From the principal’s point of view, the key to understanding the workload issue at WIAS lies in the fact that it is an Area School, located in a small rural community. While the school is small, the range of jobs and responsibilities was little different from those for large schools. This meant that staff at the middle management level often had two or more areas of responsibility. Ian reported that when attending central meetings at which new requirements might be placed on schools, principals in large schools would say,

Oh, I’ll get my bursar to do that, or I’ll get my executive officer to do that - they have someone who could take that work on - but I have to do it myself because I do not have the range of staff. On top of that, I teach. I teach 9 periods out of 30 a week, though not particularly well.

You finish up doing a lot of jobs yourself because there is no one to delegate them to. And you are always on a knife-edge so far as staffing is concerned.

Big schools with large staff numbers found it easy to cover for staff attending outside meetings. West Island had only one science teacher, one mathematics teacher and one specialist teacher of English and, so, if any one of them was absent for professional development, it was very hard to find similarly qualified teachers to provide cover. Dealing with staff absences also tended to fall on Ian's shoulders. He had spent considerable time recently before finding a first year teacher who could provide cover for a teacher taking leave. In larger schools, the principal could pass much of this kind of work on to a bursar.

Ian felt that people in the Ministry had not understood Area schools as well as they might, though he thought there were signs they were starting to take an Area School perspective. One source of frustration was the lack of trust implied by the compliance requirements of the Ministry of Education. For example, the school wanted to run an alternative education program that cost only \$10,000, but the Ministry required detailed monthly reports about progress, which he felt took his time away from "doing something real about teaching and learning."

He felt the shift to local school management, though a plus overall, was not particularly suited to the needs of Area Schools.

We have local control gone berserk – they gave schools the minutiae of management.

Area schools are a vital component of community activity and principals and teachers inevitably get drawn into the life of these communities, more so perhaps than teachers in suburban schools.

We've got to keep rural areas like this alive. The community needs schools. People in Wellington seem never to have been in a rural school.

These comments point to the dilemma involved in balancing the benefits of maintaining schools in small rural communities with the consequences that smallness had for intensifying teachers' workload.

Ian Adams believed many of his colleagues shared his dilemma between being a school manager and being a professional leader. As an example, he cites the last ERO report, which stressed the need for teachers to improve their assessment and reporting practices. The school leader in him believes on-going professional learning in this area is a top priority, "core business." However, as a school manager he has to listen to the auditors who tell him the money is not there.

The core reasons for the increase in teacher workload, as Ian saw it, came from outside the school - social changes that were happening all over the world, urban drift, the move from a focus on the cognitive to the affective domain, greater mobility in society, a greater variety of cultural and ethnic groups – they have produced stresses and strains for teachers. As a principal of a small area school, he had found the shift to local school management after the Picot reforms to be a source of increased workload, though the Board of this school was very supportive.



Luke Schreiber Chair of the Board of Trustees echoed the principal's views.

There's no doubt workload is an issue in this school. There are always teachers here at the school – teaching is not a 9.00 to 3.30 job that's for sure.

We get a lot of part-time teachers here who finish up working full-time.

I see workload basically as a resource issue. We want to do more PD, For example, the NCEA requires a lot of PD. And we're told to do more e-learning, but we can't see our way to paying for it. We've run a deficit for the last three years, our reserves are gone. We're told you have to raise more funds, but it is hard to resource things like professional development.

The increase in non-contact time was a bit of an issue here at the time it was introduced, as the primary teachers weren't getting any.

Luke admitted the Board in the early days had been too closely involved in “doing” school management rather than setting broad policy, and that this had effects on the principal's workload. More recently the Board had stepped back into more of a governing rather than a managing role. They now have fewer meetings and fewer sub-committees, which was more efficient from Ian's point of view. This shift also had benefits for middle managers who were often expected to report to Board meetings.

Luke had written to the Finance Minister about the workload issues he saw in the school.

We would like to support our teachers more than we are able to. We used to have a supervised time out room that worked well – but that had to go. We've had to cut two teacher aides on the senior side over recent years.

### **Teachers and middle managers perceptions of their workloads**

Interviews were conducted with four middle managers in the school. All spoke of heavy workloads, several using terminology such as ‘intolerable’ and ‘on the increase’. The principal saw the workload of middle managers at WIAS as unreasonable. This was related in part to the nature of the school as an area school. For example, the Head of Mathematics was the only maths teacher in the school. She was expected to know the whole maths curriculum from years 0 to 13. As non-shared load, he saw this as excessive. In larger schools, there were many more opportunities to share resources, ideas and share the workload with colleagues who taught the same subjects.

Brief accounts of each on these interviews follow.

### *Jessie Chapman – Head of Senior School*

Jessie Chapman's list of positions and responsibilities is formidable, as Table 1 indicates. She strikes one as the person about whom the quote, "if you want a job done, give it to a busy person", was written.

The workload is heavy and increasing. You never, ever finish - but our children have left home and I have a lot of family support.

Jessie has responsibility for the NCEA and Careers in the school, but does not get a time allowance for either.

The ministry gives 0.5 for Guidance and Counselling, but nothing is set aside for the NCEA or careers.

The NCEA has definitely increased Jessie's workload, and she was able to enumerate in detail the kind of work it meant for her with moderation meetings, within school meetings to learn about the changes, and so on.

The idea is great, but there are too many changes. I've had to rewrite the whole assessment guidelines for the school – our own procedures. It's the staff teaching the NCEA that are hanging out in my office.

The NCEA has created a lot of new work - and in a school like this you end up doing the lot. The resource question is very important for this school. All schools suffer, but we don't have any ancillary help. You have to do your own photocopying, typing, etc., etc. The ancillary help is less and less each year and the Ministry does not fund the changes it introduces. The NCEA relies on the professionalism of teachers, but they don't get paid for the assistance they provide to make the change work.

Jessie was quick to recognise the positive aspects of the NCEA, such as allowing more students to achieve some credit, and she linked this to workload.

The NCEA will allow the kids to get some sense of achievement and be more satisfied, which will make them easier to work with. For a lot of our more practical students, it does motivate them to keep going. Farm boys pick up rural credits and this motivates them to get more.

She saw these kids as "very good practically, and the future backbone of the country". But she regretted the extra workload caused by the NCEA that changes schools were expected to make, such as changes in assessment guidelines. She valued the help that subject associations were starting to provide, such as units of work.

**Table 5: Jessie Chapman – Head of Senior School, West Island Area School**

Positions Trained as a Home economics teacher	<ol style="list-style-type: none"> <li>1. Head of Senior School (1 MU) ( no time allowance)</li> <li>2. School NZQA liaison officer - Principals nominee (Curriculum Coordination) (1MU)</li> <li>3. Careers teacher ( 3 periods)</li> <li>4. I/C Community Education Coordinator (0.1 loading)</li> <li>5. Head of Barton Academy (community education)</li> </ol>	
Responsibilities	1. As Head of Senior School: Staff cohesion, Pastoral care, Behaviour management, Supervision of curriculum, assessment and reporting, PD, Ancillary staff, Student placement/records	2. NZQA: Deal with all matters related to NCEA.  Appraisal of 8 staff (Managing distance learning)
Teaching periods/Weekly contact hours	25 =19 + 3 careers ed.+ 3 Community education	
Teaching Subjects and Year Levels	1 English Year 11 - 5 periods 1 Mathematics Year 11 – 5 periods 1 Composite Years 11 Rural Skills (5 periods) 1 Life Skills Year 11 (2 periods) 1 Year 10 Health (1 period) ACE 3 periods	
Weekly preparation and marking (Average hours per week)	(Working day 7.45 am to 6.00 pm each day) 2-3 hours in weekends A couple of days in each holiday period	
Cover for teacher absence	Often – lot of internal cover because classes are small (to avoid bringing in relief teachers)	
Duty sessions per week	2 per week	
Other responsibilities	Year 13 Form Teacher Disseminating NZQA information takes a lot of time	
Regular meetings/scheduled management	Meets after school 3 days out of five per week Full staff meeting every Monday after school Head of Senior School - meetings HELA English meeting every 3-4 weeks Syndicate	
Extra curricular and related professional activities	Often involved in student activities – formals, camps, sport teams, drama.	

When asked about the role of middle managers, Jessie Chapman felt there was a definite need to make the position more attractive. She felt middle management positions were ‘off-putting’ in terms of the levels of responsibility. There was also a need for more PD, especially on-the-job training for the role; and attendance on middle management training programs should be a right, rather than something that led to competition with other teachers for access to the school’s limited professional development budget. Jessie felt that Middle Management was a “grey area” where there was a need for clearer staffing orders and specification about teaching time to make the role more manageable.

### ***Colin Gronn – Head of Technology***

Colin Gronn, a former carpenter, is Head of Technology in the School. Table 2 provides an outline of Colin's workload. Technology includes a broad range of subjects including control technology, information technology, structures, materials, biotechnology and food technology. Colin is a very active member of the school community in many areas and typifies the high workload for middle managers in the school, as reported by the principal.

The greatest source of workload pressure for Colin has been meeting the paperwork requirements of the NCEA for the past 3-4 years. He had found writing the new units of work frustrating, and had to rewrite some up to four times.

They are very particular. They check my marking – this year I got good feedback on my marking – clean as a whistle.

Curriculum change at years 7-10 had also placed pressure on workload.

All schools are now required to provide technology and it's taken 3-4 years to get it up and running. Our ERO required it, but it was hard to understand what the Ministry wanted. "That's not what we mean", they would say. You felt like saying, "get your act together - stop changing the system all the time. It's coming together now and in some ways it is better, though it's dumbing down in some ways.

Colin thought the NCEA Technology course was too paper-oriented for "kids from farms", and so he had to write his own unit standards.

This year I've gone for Industry Training Organisation standards (ITOs), as they are written for me. There are more precise standards about use of tools, like a chisel, that are more suited to these kids.

The ITO gave the rubber stamp straight away. This year Colin is trying to get accreditation for furniture trades, but finding it a bit more difficult.

Colin felt his biggest problem, was the difficulty in delegating work because he had such a small department. And we can never get a relief teacher in my area. "When I had the flu it was easier to come to school than organise relief, because the kids riot if you are not there."

Though his department had a lot of equipment, the task of cleaning and maintaining it fell to him largely. He had few opportunities to talk to colleagues. "Cluster group meetings are very important. But I can only get to about one in three. It would be great if it was easier to get to them though".

Colin saw his greatest needs as a technician and help with the building alteration in the school (which he is not allowed to do). The school badly needed a withdrawal room with full time staffing. (Some kids just can't control themselves"). As for the office staff, he felt their workload was horrendous.

**Table 6: Colin Gronn – Head of Technology, west Island Area School**

Position	Head of Essential Learning Area (HELA) Technology 0-13 Years 0-13 1 Management Unit
HELA Responsibilities	Technology Years 0-10. Managing budget for 7-15 ELA team meetings (1/3 weeks) Developing NQF courses for Years 11-15 Oversight – staff, student assessment, budget, ancillary staff
Teaching periods/ Weekly contact hours	25
Teaching Subjects and Year Levels	Technology Year 7-10 NQF Graphics 9-11 Workshop/ITO Years 10-13 Program for suspended students – in another part of town
Weekly preparation and marking (Average hours per week)	~12 hours – Occasional work at home – 3 night per week; ~ 3 hours in weekends maintaining tools
Cover for teacher absence	Occasionally. Not enough relief teachers
Duty sessions per week	Runs the detention centre – voluntary duty
Other responsibilities	
Regular meetings/scheduled management	Full staff meeting every Monday HELA meeting every 3 weeks Middle School Syndicate meetings Occasional pastoral care meetings
Extra curricular and related professional activities	~2 hours per week - Sport, Union Representative, Professional Association (Technical and Graphics teachers)

***Dawn Meadow - Head of Essential Learning Area Science, Head of Middle School and classroom teacher***

Dawn has 37 years experience, most of it in England where she trained. This gave her a useful comparative perspective. She thought the workload in NZ was greater (as did other teachers from England we interviewed in this study). With respect to the NCEA, she believed that the requirements were less than those to which she was accustomed and that it was a temporary situation, as people would get used to the new system.

The NCEA not a problem – it involves less internal assessment than in the UK. You just have to get on with it. But I do have smaller classes – I’ve only got 12 children – 12 lots of internal assessment.

Dawn’s responsibilities are set out in Table 3. Like the other middle managers we interviewed at this school, Dawn had two main areas of responsibility as illustrated: Head of Middle School and Head of the Science Learning area.

Student behaviour was not a problem for Dawn, but she did say,

I am spending quite a bit of time dealing with problems of other teachers – that’s where I get my hassle - that these children who do

play up – I’m one of the teachers who has to go in and helps sort it out. Some kids are sent out an awful lot of times.

So far as workload is concerned, Dawn felt that pastoral care and behaviour management were the big contributors. “That is one of the biggest things I have to sort out as a middle manager.”

She regretted not having a laboratory technician.

The actual amount of lab work and lab preparation isn’t going to change – and that is one of the problems of being in a small school, you have to do it all for yourself. I’ve always had the lab work done for me, making up solutions, etc.

Apart from the lack of a lab assistant, Dawn thought that other resource, such as equipment and rooms were adequate. She had her own office. “I usually spend a week clearing up at the beginning of each holiday.”

I always feel that six lessons a day is a tremendous workload for staff. You’ve got a constant stream of kids during the day and you don’t have time between the end of one lesson and the beginning of the next to really get yourself sorted. I’d make it 5 x one hour.

As for administrative support, Dawn was doubtful. “There are so many things, like downloading stuff, printing, that I would rather do myself as it is too hard to explain”.

Time was the big factor for Dawn – time to do the job, to get the good resources for teaching science – for downloading useful material.

(Dawn’s husband is a science teacher too, but has not taught in NZ. He writes for websites and makes more money in 2-3 days than she does in a week)

**Table 7: Dawn Meadow - Head of Essential Learning Area Science, Head of Middle School and classroom teacher, West Island Area School**

Positions	1. Head of Essential Learning Area Science Years 0-10 Member of Middle Management Team 1 Management Unit	2. Head of Middle School (7-10)
Responsibilities	1. Science program- Years 0-10. Managing budget for 7-15 ELA team meetings (1/3 weeks) Oversight – staff, student assessment, budget, ancillary staff Appraisal of 5 staff annually	2. Staff cohesion Pastoral care Behaviour management Supervision of curriculum, assessment and reporting PD Ancillary staff Student placement/records
Teaching periods/Weekly contact hours	25 Usual school day – 8.15 – 5.30	
Teaching Subjects and Year Levels	Science Years 7-11 Biology Year 12	
Weekly preparation and marking (Average hours per week)	1/2 hours per night Most Sunday afternoons Lab preparation/cleaning (no Lab. Technician)	
Cover for teacher absence	Rarely	
Duty sessions per week	3 per week	
Other responsibilities		
Regular meetings/scheduled management	Meets after school 3 days out of five per week Full staff meeting every Monday after school Member of Board of Trustees HELA Science meeting every 3-4 weeks Head of Middle School - meetings Occasional pastoral care meetings	
Extra curricular and related professional activities	Member of school band Rarely attends meetings of science teachers' association	

**Betty Reimer – Deputy Head**

Betty has been in teaching for 30 years. She trained as a primary teacher and came to the school fifteen years ago as a senior teacher, after fifteen years teaching. Later, she gained promotion to Deputy Principal. The previous DP, she said, had been at the school for 20 years and had a nervous breakdown. Her responsibilities are set out in Table 4.

Betty places student behaviour high among the factors that contribute to teacher workload.

We have a lot of dysfunctional families - transient workers - and we lose a lot of our good students to boarding schools. We have had difficulty developing a behaviour management system that can be effective. After school detention is hard to operate when so many students take buses.

I detained one student, but had to take him home as the parents would not come and pick him up.

**Table 8: Betty Reimer – Deputy Head, West Island Area School**

Positions (4 Management Units)	1. Deputy Principal 2. Classroom teacher
Responsibilities	As Deputy Principal: Deputise for Principal when absent; Senior Mgt Team; Middle School Mgt Team; Smooth running of school on day-to-day basis; Pastoral care and guidance of students Bus controller
Teaching periods/Weekly contact hours	15 periods
Teaching Subjects and Year Levels	Health – Year 7 English - Year 7 Science – Year 7
Weekly preparation and marking (Average hours per week)	Working day 8 am to 5.00 pm each day (but can not do any preparation or marking in school hours because of DP role) Eight hours most weekends Two hours most week nights
Cover for teacher absence	Often does these herself, as does the principal.
Duty sessions per week	Yes -2 per week
Other responsibilities	
Regular meetings/scheduled management	Averages about four staff meetings per week – usually after school Plus pastoral care meetings Board of Trustees

Twelve out of thirty of Betty’s non-teaching periods are occupied with behaviour problems and pastoral care each week on average. It’s hard to find specialist staff – and the funds, “because it’s all contestable funding.” But she thinks the school does well, given its clients, and the polarised community.

On resources, Betty says that what really bugs her is the way the principal has to fight for every dollar he gets (e.g. pay and travel costs for relievers). The union won some benefits, but they are not enough. Sick leave and bereavement leave have to be paid for by the school.

Betty says she enjoys the challenge of her job, the people, “the tapestry of life”, her work space. She feels “lucky not to deal with the NCEA and deal with all that.” – “it’s criminal. I doubt it’s producing better teaching – it seems to be wearing teachers down. “

Betty is married to a farmer. She says he gets cross with her hours of work and says there seem to be more requirements for compliance in teaching than in dairy farming. She expresses sympathy for the principal who “spends hours fighting incompetent people in the Ministry.” Betty stated that the amount of monitoring was ‘ridiculous’, serving only to ‘make jobs for the next layer in the Ministry’.

Betty expresses doubt about her capacity to maintain the quality of her teaching.



I teach by the skin of my pants at the moment. I enjoy teaching, but I feel like I'm on the road to nowhere and I think a lot about leaving.

### **Summary: Emerging workload issues**

West Island Area School gave the impression of having to operate within a tight set of demands and constraints. These were partly due to size and the effects this had on staff workload, such as the need to “double up” on middle management roles, the shortage of ancillary staff and the difficulty of covering for staff absences. There are no fee-paying students from overseas at West Island to provide some discretionary funding.

The nature of small rural community also imposes its own demands. Problems in the community “come into” the school every day. Student behaviour was a big issue in this school. The Principal stated that many of the children required a lot of counselling and that school may be the only safe place they know. There are fewer alternative services in such communities to help schools cope with these problems compared with schools in larger cities. Consequently, more of the load seemed to fall on the teachers in this community. Managing student behaviour was a significant demand upon the time and energy of middle managers and the principal (the latter had just spent most of one day looking after a boy who had been threatened by another). Teachers varied in their capacity to establish a learning environment that engaged all students in this community, with implications for curriculum and professional development, as well as funds to establish alternative school programs.

There also seemed to be a dilemma in terms of the schools ‘target’ audience – trying to prevent the urban drift by developing a more rural trade focused curriculum, while recognising that many children of landed gentry families were being sent to urban boarding schools because West Island could not offer the range of subjects they desired (presumably NOT trade-related subjects). When he first came to the school, the Principal said that it was a mainly academic environment, but now the student mix had changed significantly.

This case study serves well to raise questions about the role of middle managers and how that role relates to the quality of teaching and learning. The four profiles above serve to indicate that these middle managers are busy. But the impression is not that they are busy leading or promoting the quality of teaching in the school. There are no clear links between what they are doing as middle managers and the quality of professional practice, or improvement in student learning outcomes. The current system appears to allocate management jobs to middle managers, not provide leadership roles for teachers to enhance the professional development of other teachers.

As Jessie Chapman put it, “ Middle managers are hugely sidetracked by Ministerial paperwork and surveys. We need time to ensure a quality management system is in place and that it is being adhered to”. Although there are many after school meetings, we heard few accounts that these went beyond administrative matters and the need to deal with individual student behavioural problems. The middle managers talked little about themselves as agents for the development of the school as a

professional community. The pressure of immediate demands appeared to crowd out their role in the core business of a professional community – promoting the deprivatisation of practice, for example, and opportunities for reflective dialogue based around data about student progress.

By their nature, area schools have teachers with reduced opportunities for professional interaction and keeping up with their teaching field. Middle managers would appear to have a key role in setting up the conditions for joint professional learning in the workplace, especially in small areas schools. Special consideration may need to be given to school funding formulae to ensure that opportunities for teachers to participate in professional development programs are as great as for teachers in other schools. This should include opportunities in the school and classrooms supported by visiting consultants, as well as ready access to on-line PD resources.

The school did not reveal exemplary strategies for workload management. Dawn Meadow spoke of building ‘downtime’ into her work – space where she does not have to deliver directly but provides the students with self-directed project work. Jessie Chapman spoke of the useful work of some subject associations that were creating helpful examples of assessments that teachers could download (e.g. Math Association).

The problem of providing cover for absent teachers was mentioned several times. The lack of ancillary support staff in an Area school like this also meant that teachers were often doing menial/administrative tasks that took them away from their core business. The Principal, for example, stated that the Head of Science, who is also the Head of the Middle School, not only had to teach 25 lessons (among other responsibilities) but also had the task of looking after the laboratory and its equipment. A laboratory assistant, even one day a week, would alleviate some of the pressure on this particular staff member.

Ministry of Education regulations and the NCEA were identified by some teachers as adding to workload, both in terms of the level of reporting/paperwork required and the apparent failure to recognise the specific needs of West Island. But the intensity of concern about workload effects of the NCEA was less than most other schools visited, reflecting, perhaps, the fact that there were few classes at the senior levels. The Principal noted that for ‘good’ teachers, the NCEA was not an issue. “Our school does not hang its hat on exam results. The good teachers were always assessing where their students were at . . . For other teachers it has increased workload because they now have to think about what they are doing.”

Colin Gronn spoke of needing to rewrite NCEA technology standards to make them more appropriate to the needs of students from rural backgrounds. Jessie Chapman also spoke of a number of changes in the NCEA, which had resulted in her rewriting whole assessment guidelines etc., and of being ‘sidetracked’ by Ministry paperwork. The problems of communication, inconsistency and lack of clarity may also add to negative perceptions of workload – a failure to understand how the increased bureaucracy improved the core functions of teaching and learning.

As indicated previously, resourcing was an issue, particularly the limited ancillary assistance. All interviewees stated that they frequently undertook mundane

administrative tasks due to lack of available resources and one even commented that the workload of office staff was 'horrendous' – obviously not an option for providing assistance. Luke Schreiber noted that the school had to 'cut' two teachers' aides in recent years. However, the Principal stated that at long last teachers in area schools now have non-contact time, like secondary schools.

Work/life balance was obviously an issue for the interviewees. Jessie Chapman, for example, made particular reference to the support of her family, while Betty Reimer said that her husband 'gets cross'. But all expressed a love of teaching and a reluctance to leave the occupation despite the workload. The Principal noted 'they never complain – I am lucky with the people I've got.'

## **CHAPTER FIVE: CROSS CASE STUDY ANALYSIS**

### **The case study research aims**

In accordance with the aims of the whole study, the case studies aimed to:

- Gain information about the workloads of teachers in New Zealand secondary schools
- Identify factors, including those beyond the present control of individual schools, that were affecting teachers' workloads
- Identify the variety of ways in which teachers work was 'managed'
- Consider areas where improvements could be made
- Discover and discuss models of good practice

### **Interviews**

The school interviews were conducted with principals, members of boards of trustees, senior managers, middle managers and teachers. Most were single interviews, but in some cases participants were interviewed in groups or pairs.

Most interviews took between fifty minutes (one class period) and one hour. Interviewers taped the interviews after obtaining the permission of the participants. They also took comprehensive notes.

### **Selection of school participants**

Because of the very short timeline, and in recognition of the many pressures on schools and the difficulties involved in releasing teachers for interviews, the final choice of participants was delegated to school principals, who were given a plain language statement with a letter that requested their school's participation.

The researchers found that the participants were well chosen, in that they were able to provide comprehensive information and a range of well-articulated perceptions on workload.

### **Interview schedules**

In accordance with our resolve to maintain a focus on teaching and learning, the interview schedules were designed to provide information about how the work of teachers in the selected schools was being mobilised to effectively contribute to the total work of the school as a teaching and learning organisation. In particular, we wanted to find out the extent to which the work of middle managers was leading other teachers to develop their professional knowledge and skills.

Separate interview schedules were prepared for the following

- Principals and members of school boards of trustees
- Teachers

- Middle managers.

The schedules were designed to collect two kinds of information:

### **Schedule A**

Designed to gather *objective* information about workload size, e.g. number of periods taught in one week, number of scheduled meeting times etc.

### **Schedule B**

Designed to gather information about participants' *perceptions* of teachers' and middle managers' workloads and of contributing factors, including features of the school and its population, government initiatives, leadership and support.

The interviews were not confined to the questions in the schedule. Participants were encouraged to express their views on all issues they considered relevant.

Data from the case studies was used to inform the development of the survey instrument for schools. It was also used to provide:

- Detailed descriptions of teachers' and middle managers' workloads
- Detailed descriptions of the factors that affected teachers' workloads
- Detailed descriptions of the 'management' of teachers' and middle managers' workloads
- Triangulation and validation of preliminary inferences relating to teachers and middle managers' workloads

## **Findings from the case studies**

### **Hours worked per week**

In interviews, teachers were asked to state the number of hours they worked per week on various tasks as an 'average', with the aid of Schedule B. Most teachers did not find this difficult, but they cautioned that in some weeks, e.g. at 'peak' assessment and report writing times, they worked much longer hours. The averages include weekends but not holiday periods. Clerical/administrative duties are not included as a separate item. This could help to explain the difference between case study totals and the survey averages.

With the exception of 'scheduled duties' where the information was also obtained from school documents like the timetable, the information in the **Table 9** (overleaf) reflects *teachers' own estimates* of average weekly number of hours as worked across longer periods of school term time.

**Table 9: Average number of hours worked as estimated by teachers in the case study schools**

<b>Teachers</b>	<b>Scheduled classroom teaching duties:</b>	<i>Management duties</i>	<b>Other scheduled duties: (Home group, pastoral, yard duty)</b>	<b>Meetings</b>	<b>Preparation &amp; marking</b>	<b>Extra curricular duties</b>	<b>Total average hours per week</b>
<b>Teachers <i>without</i> management responsibilities</b>	21.9	N/a	4.7	1.5	10.3	4.5	<b>42.9</b>
<b>Teachers <i>with</i> management responsibilities</b>	15.7	16.1	2.7	2.7	10.2	3.1	<b>50.5</b>

## **Teachers' perceptions of workload**

### ***Overall perceptions of manageability***

Adjectives used to describe workload by teachers in all case study schools included: 'heavy', 'challenging', 'overwhelming', 'stimulating', 'tiring', 'creative', 'invigorating', 'exhausting'. Almost all said that the workload was heavy, but most felt that it was generally manageable, most of the time. A significant number said that it was usually manageable, but that at certain times, such as report writing or assessment periods, workloads exceeded reasonable expectations. At these times they tended to become highly stressed and they believed that this negatively affected their work with students.

### ***Reasons for working at home and at times outside the school's hours of operation***

All teachers interviewed did schoolwork at home after school, at weekends and during the holidays. Nearly all of this work was marking and preparation, mostly marking. They appeared to accept this as part of their job, but some said that it interfered with home life. Some teachers managed to do a substantial amount of marking and preparation at school, but said that, for various reasons, mostly to do with having 'peaceful' uninterrupted and longer periods of time, it was often easier to do it at home. Some had adopted strategies like arriving at school early in order to have easy access to the photocopier. Some liked to stay later at school. Some liked to work at school on weekends, when it was quiet. Most agreed that working during allotted non-contact periods could be problematic because of interruptions from students, the need to talk with colleagues, and, sometimes, the need to simply 'chill out' after a demanding lesson. Most teachers saw having non-contact time in fifty-five minute blocks between classes as too short and 'fragmented' to do concentrated work. This was given as the main reason for working at home and at times outside the school's hours of operation.

There were no significant differences between schools in this area. The great majority of teachers in all schools seemed to accept the notion of working at home as part of the 'culture' of teaching.

### ***Perceptions of control over workload***

Most people tend to feel that the amount of personal control they have over their work affects the degree of satisfaction they experience in relation to workload. For this reason, we were interested to discover people's perceptions of control, and the extent to which perceptions of lack of control were linked with perceptions of having too heavy workloads.

Most people interviewed said that they felt reasonably high levels of control over the nature, amount and pace of their work. Most people also described their work as heavy but manageable for most of the time. Teachers in the government schools said that control was 'not an issue' for them. Some appeared to be surprised by the question, as if they had never thought to ask. They said they felt personally in control of their own classrooms and that they chose whether or not to participate in activities

outside the classroom, such as non-compulsory meetings, sport and other extra curricular activities, and membership of various groups and committees. While there was 'never enough time' to do all they felt necessary, this was more because of the 'amount of work that has to be got through' and the demands they placed on themselves, than to external pressure or control by school management or external agencies.

They also said that they had a choice of participating in a variety of decision-making processes that affected their work, usually by volunteering to be a member of a committee. Those who chose not to participate said that they had confidence in the people who did, and that they usually had no reason to question or oppose the decisions that were reached.

However, the two teachers at St James School who said that they were most overworked also mentioned feelings of having insufficient control:

I'd like to say I have a lot, but I don't feel I have a lot of control. A lot of people seek promotion to get away from the pressures of the classroom, but I love being in the classroom. The school should reward senior practitioners.

I don't feel in control. At the end of a hectic teaching day it's easy to feel you haven't done well and blame yourself.

Control was also a big issue for one of the middle managers at this school:

As middle manager you don't have a lot of control, you're sandwiched between the needs of your staff and what comes down from above. For example, we've got a meeting this afternoon and (senior) management has decreed what the meeting must be about – but the staff have other needs.

Another teacher at this school said:

During the day you might think of three or four things that you could do to improve your teaching but by the time you get the opportunity to write them down, they're gone, or you might want to talk things through with your HOD, but he's got a meeting or you've got a meeting.

The teachers at this school worked more contact hours than teachers in the government and state integrated schools. They had also experienced increases in class sizes in the past five years and felt they had little say in how decisions on such matters were reached.

'Control' can be direct or indirect. The workloads of some teachers at St. James School appeared to be affected by indirect control mechanisms at the senior management level that had the power to (e.g.) increase class sizes and set high teaching loads. This may have led to feelings of disempowerment and negative perceptions of their workloads as well as actual quantitative and qualitative workload



increases. Teachers in the government schools tended not to be aware that such control mechanisms might be operating in their schools. They had faith in the schools' participatory decision making processes and systems. However, their perceptions of being in control were, to some extent, negated by their descriptions of workload stress. It seemed possible that these teachers may have, in actuality, possessed less control than they themselves believed.

### *Perceptions of how work was being managed*

Teachers in all schools were unreceptive to the suggestion that someone other than themselves, e.g. the principal or a HOD, might be 'managing' their work. A strong ethos of individual responsibility for workload came through, especially from middle managers. The following comment, from a HOD at Gladstone High School, is fairly typical:

(Workload) is not such a major problem in my life. I manage it. I like systems and I'm organised. I would drop something if it was (a major problem.) For example I already dropped being in overall charge of the netball program.

Several people said they had taken steps to reduce their workloads because of concerns about their health, effects on their teaching or concerns about work-life balance. One of these people was a teacher who had been diagnosed with high blood pressure. He said that he now left school at 4.30 instead of 7 pm and worked no more than half a day at weekends. A teacher at Gladstone High School said that she had chosen to give up her middle management position because she felt it was encroaching too much on her preparation and marking time and that her teaching was suffering as a result. Several teachers said that they had reduced the amount of time given to extra curricular activities. Most teachers described such actions as 'managing' their own work, but said that they only took such decisions as giving up extra curricular activities as a last resort and because they felt that overwork was threatening their capacity to teach effectively. Obviously these teachers felt they still had room to move within the total work situation.

Teachers did not believe that principals or managers or even demands of 'the system' were the main sources or causes of overwork. They were driven more by personal commitment 'That's just the way teaching is'. 'You do it for the kids.' 'You do what it takes.' 'You have to work hard if you want to be a good teacher' were typical comments.

For some teachers, the line between 'duty' and 'personal commitment' was blurred:

I love it. It's open ended you never finish. I'm not into whether or not it's fair. I love this school and I really, really love my job. I probably could pull back, but it's not a problem, unless I'm really tired. (Dean, St. James School)

The corollary to this kind of enthusiasm and stoicism with regard to the nature of the work was that teachers believed that they should take responsibility for managing their own work because of feelings of professional obligation. Fear that their work

might be managed by others was expressed, not so much in terms of concern that this might increase their own workload, but that it might interfere with what they perceived to be in the best interests of students.

The 'management' of teachers work was thus seen by them as something for which they themselves had the prime responsibility. Management by principals and senior managers was viewed in terms of providing the leadership, conditions and support that would allow them to work most effectively.

### **Factors that affected workload in the case study schools**

#### ***High levels of personal commitment***

All people interviewed in the case study schools, especially middle managers, appeared to share high levels of personal investment in their work. This was particularly observable at Te Kura o Te Ra school, where management responsibilities were shared among all teachers. The teachers at this school worked in a 'family' atmosphere where the distinctions between 'work' and personal commitment were sometimes blurred. These high levels of dedication that stemmed from the school's special 'vision' led to teachers experiencing their workloads, in some ways, as more satisfying. However, it also meant that the teachers were working harder and longer as they placed high expectations on themselves and their colleagues.

In some cases, high levels of personal dedication appeared to be taking a particularly high toll in terms of workload and stress. This was especially true of teachers concerned to do their best for students undertaking the NCEA. Some teachers in the state integrated school and the Independent school seemed to be especially pressured. Two teachers in the state integrated school mentioned illness and said they believed this to be a direct result of heavy workload. The teacher who had been diagnosed with dangerously high blood pressure said that was thought to be work related. Others said that workload was interfering with their home lives and obligations to their families.

#### ***Student behaviour/pastoral care***

Teachers at the state integrated, Maori medium and Independent schools said that poor student behaviour was not a factor that seriously affected their workloads. This was also the case at Hillary Boys' High School. (These schools cannot be described as typical in terms of the student cohort. See 'Other fieldwork schools' below for further comments on this aspect.) However student misbehaviour was cited as a concern at Gladstone High School and West Island Area School. At Gladstone High School, all people interviewed expressed concern about the behaviour of students. However they also said that Gladstone, as a Decile 9 school, had fewer problems and better ways of dealing with them than many other schools.

The kids here understand the system but they will push it. They work to the edge of the boundaries. Some students are arrogant. Some teachers have big problems. That does add enormously to workloads.

All people interviewed at Gladstone said that despite the school's excellent student management and pastoral systems a great deal of teacher time and energy was taken

up in dealing with unacceptable student behaviour and associated welfare problems. This included the stress of dealing with classroom incidents, following up reports, communicating with parents and liaising with the School Counsellor, Deans and Tutors and members of the senior management team.

At West Island Area School, most interviewees mentioned managing student behaviour as a workload issue. The principal pointed out that:

‘We have two classes, the landed gentry, with high expectations who are ready to transfer their children to city schools at Year 9 – and then you’ve got the children of itinerant workers and single parent families with attendant social problems.’

An experienced teacher at West Island Area school who had originally taught in the UK said:

‘The kids here are no worse than anywhere else, but I do often have to deal with problems relating to other staff, with students being sent out of class a lot. I try to get to know the kids, to counsel them, sort them out.’

The comments of another teacher in the same school were similar:

‘We have a lot of dysfunctional families here – quite a lot of students who are state wards, living with foster parents. We’ve tried to put a behaviour management system in place, but it has not been effective. Detention tends to be unworkable as many students have to bus home to other small towns. Parents refuse to come and get the students if they miss the bus.’

Hillary Boys’ High School appeared to have developed very effective structures for managing student behaviour. Practical policies and strategies for encouraging positive student behaviour and dealing with incidents of negative behaviour had been developed and were being implemented. Deans, Assistant Deans, the School Counsellor and the Careers Adviser all worked together in one building, the ‘School Support Centre’. Two full time secretaries provided excellent secretarial and administrative support, and the middle managers’ time allowances were relatively generous. There was, at all times, a Dean on duty, with dedicated time available to deal with instances of student misbehaviour in accordance with agreed whole school codes and procedures.

This model impressed the researchers as likely to reduce the pressures on teachers’ workloads that can result from dealing with unacceptable student behaviour. Its strengths were: efficiency, the capacity to deal promptly and effectively with a range of student issues, the physical proximity of staff with complementary roles, the time efficiencies, including relatively generous time allowances, and the high levels of administrative and secretarial support that relieved Deans and teachers of much unnecessary ‘administrivia.’

## *Resources and Support*

Most of the people interviewed were satisfied with the physical resources in their schools. Of particular interest to the Australian researchers was the fact that most teachers had their 'own' classrooms, where they could store teaching resources, display students' work and generally feel they had a 'home.' This was not often the case in the Victorian secondary schools in which three of the Australian researchers had recent teaching and research experience. The New Zealand teachers appreciated having their own classrooms, most of which were well resourced with such items as overhead projectors and TV/video equipment.

I am nearly always in that classroom. I have a real sense of ownership – of my own personal space. I have enough room. It's very nice because I can put my own things out. (Teacher Hillary Boys' high School)

Teachers also had desk space in shared staffrooms. Although these spaces tended to be small – typically a secretaire with a small desktop upon which books competed with a laptop computer for space - no teacher interviewed saw this as cause for complaint. We recognised that limited staffroom space was, to an extent compensated by the teachers having their own classrooms, but we also realised that these classrooms would not necessarily be available to them as working spaces during their non-contact time. Such tasks as marking and preparation would need to be done, in non-contact periods, in the staffroom where conditions were less than optimal. We felt that working in these conditions in the relatively short periods of time between classes would be difficult. Even though teachers did not complain about this lack of an appropriate workspace, it could be a significant reason for their preference to work at home.

Middle managers typically had individual offices or offices shared with other managers. All had ready access to telephones, computers and shared secretarial support.

All people interviewed said that they needed more administrative and secretarial support. Photocopying was highest on the list of tasks requiring assistance. Other tasks included help with entering and processing electronic data, preparing student worksheets, general word processing and telephoning.

Middle managers in all schools said that they had some access to secretarial support but this varied with the school. Some middle managers appeared to be surprised by the suggestion that they might benefit from extra secretarial support.

Hillary Boys' High School's School Support Centre provided a good example of the capacity of generous, well deployed physical and human resources to increase effectiveness and reduce workloads. Administrative support was high. The two secretaries were the first point of contact for visitors, staff and students and they provided a full secretarial service for middle managers. They also dealt with routine administrative tasks like checking school uniform, giving out late passes, dealing with lost property and following up student absences. Consequently, the time of the middle managers was freed up to deal with more serious issues. Middle managers also had

relatively generous time allowances, and communication was made easier by the fact of their working in the same building.

Teachers at St James School worked in an exceptionally pleasant environment with excellent physical resources and generous administrative support. However, scheduled hours of duty, including contact hours and extra curricular hours were relatively high. Teachers interviewed in this school were concerned that workloads were adversely affecting the quality of their teaching, for which they had set themselves high standards.

#### *Extra curricular activities*

All teachers interviewed agreed that extra curricular activities were an integral part of their schools' educational program. Teachers' participation in many of these activities was 'voluntary' in that they more often than not chose to contribute in an area in which they themselves had a particular interest, such as cricket or football, music/drama performances or debating. Among the many advantages of these programs were the enjoyment experienced by both teachers and students and the positive relationships they were able to establish away from the more constrained atmosphere of the classroom.

Subtle pressures and 'expectations' led teachers to 'volunteer' for extra curricular activities, but generally most of the time spent on them was not 'counted' as part of the required workload. Clearly many teachers were giving many hours of their time at lunchtimes, after school and at weekends because of their interest in the activity, as well as the building of rapport with students.

With regard to workload, several teachers said that if they were feeling too much workload pressure they would choose to give up some of their extra curricular activities. (A couple of teachers had already done so.) In all case study schools extra curricular activities appeared to be flourishing, Principals were highly supportive of these activities, but were also concerned about the demands on staff time and energy.

#### *Leadership and vision*

School vision statements and styles of leadership varied between schools –the vision of Padua College for example reflected the worldwide goals of religious education, while that of St James School was framed in terms of 'excellence.' However all teachers interviewed in all schools subscribed to the common vision and purpose of their profession, to care for the educational and other needs of their students. In all six case study schools, this professional vision was reflected and developed in whole school policies that were being implemented under strong leadership. As noted earlier, such policies are an important outcome of site based management that causes teachers to place high demands upon themselves, demands that may be unrealistic in terms of overall conditions of work.

All teachers and middle managers interviewed showed clear understanding of the broader goals of the whole school (not just their own classroom, area or department) and felt themselves to be working towards these goals. Most teachers and middle managers interviewed were also highly supportive of their schools' leadership (although it should be remembered that the selection of people to be interviewed was

largely that of principals!) All six schools had developed ‘visions’ articulated in school documents, and teachers and middle managers appeared to be working within strong frameworks of commonly understood and shared values and goals. No teacher or middle manager interviewed appeared to be working in isolation or to a personal agenda that differed in any significant way from the school’s vision.

Te Kura O Te Ra school provided perhaps the strongest example of the high levels of commitment generated from teachers sharing a special vision and sense of common purpose, and of the results of this commitment in terms of workload. At this school, the common vision and shared purpose of improving the life chances of the Maori students strongly infused the work of the teachers. This resulted in a more even distribution of non teaching and management duties, so that nearly all teachers were also ‘middle managers’, with high levels of determination to ‘do whatever it takes’ for the students.

The researcher who visited this school gained a keen impression of how strong leadership and commitment to a shared school vision under strong leadership, can make teachers’ work more meaningful and enjoyable. But she was also made aware of the extra demands these highly committed teachers felt compelled to place upon themselves in order to achieve the vision.

Another interesting example of how a school’s vision was affecting teachers’ workload was seen at St James School, where teachers’ aspirations were in line with the school’s vision of ‘excellence’. These teachers felt pride in their school and its achievements, but they also felt constrained to work ever harder to maintain and improve them. As one middle manager said:

Our commitment to excellence in everything creates a sense of pressure. You can’t do something second-rate in this school. That’s good, but it’s always going to mean your workload is open ended.

We concluded that strong leadership and shared vision generate high levels of commitment in teachers. Such commitment helps to make teachers’ work satisfying and productive; it enriches their professional lives. The demands teachers make upon themselves as a result of their own commitment and that of their colleagues are often greater than demands made upon them by managers or outside agencies.

However, teachers who have unrealistically high levels of personal commitment are in obvious danger of burnout. Support mechanisms need to be such that such commitment does not become counter-productive in terms of teachers’ effectiveness.

### ***Professional Community, Professional Learning and the workload of HODs***

All of this raises obvious questions about the workloads of HODs. Interestingly, the HODs did not describe their professional leadership role as onerous. On the contrary, they found it among the more rewarding aspects of their work. All, however, were greatly frustrated by the lack of time they had to perform these leadership duties effectively. Without exception, the HODs interviewed did not believe that they had sufficient time to do these things as effectively as they believed they should, and teachers and principals agreed with them. To varying degrees, they were experiencing

feelings of guilt and inadequacy because they felt they were failing to do the job as it needed to be done. A number said that the leadership responsibilities were growing as more became known about effective teaching, and demands from principals and external agencies became heavier. They complained of more and more responsibilities being placed upon them without the compensation of other work being taken away.

### *ICT*

People interviewed in all six schools agreed that the effective use of ICT had great potential to improve effectiveness and alleviate workloads. But the majority did not feel confident about their own use of ICT, even in schools where equipment and resources, including effective technical support, appeared to be generous.

The exception was Gladstone High School, which was recognised as the leading school in an ICT development cluster with two other High Schools. As a result of extra funding, the school had a range of ICT equipment, which included a good supply of computers and data show projectors. The ICT skills of the teachers and middle managers seemed to be exceptionally well developed and confidence in the use of ICT for a range of purposes was high.

Factors that contributed to the successful use of ICT and Gladstone High School, with some consequent improvement to teachers' workload included:

- Enthusiastic and visionary leadership by the principal
- Strong support from the Board of Trustees
- Investment in hardware, software and educational applications
- Provision of technical support
- Coherent professional development and training strategies focussed on teaching and learning
- The highly developed professional learning culture of the school that had been built in a variety of ways, not necessarily connected with ICT, e.g. teachers' voluntary participation in learning teams

The last factor appeared to be very important. At Gladstone, teachers did not just receive ICT training then go away and use it as individuals. Teachers worked in teams and groups and relied on each other to have and use necessary ICT skills. Students were accustomed to using ICT applications in the classroom and to searching the internet for materials. ICT use was thus integrated into the school culture. Not having a particular ICT skill was not seen by teachers as something to hide or to be ashamed of. If some teachers did not have the skills, others would help them. Teachers said that they felt confident about asking colleagues for help when they encountered an ICT problem.

We concluded that the effective use of ICT has great potential to improve teachers' workloads, that there will be an on going need for investment in hardware software and technical support, and that effective training and professional development is essential. These things, however, are not sufficient to guarantee that teachers will use ICT to best advantage. As with many other areas of teacher development the professional learning culture of the school is a crucial determinant of the extent to

which teachers will be prepared to take on the necessary challenges of embracing new technology and its changing applications.

### ***Government Requirements***

#### *Performance Review (Staff appraisal system.)*

Systems for staff appraisal/performance review operated in all case study schools. In line with research findings that show teachers' preparedness to be held accountable for their practice (Wise et al 1984, Bridges, 1986, McLaughlin & Pfeiffer, 1988), the teachers in our case study schools had no quarrel with the performance review systems in their schools that required them to give accounts of their practice to the principal and other managers.

McLaughlin & Pfeiffer (1988:62) note that improvement of individuals' performance should be a major goal of effective performance review. They conceive improvement as having two components: '*reflection*' about teaching and '*motivation*' to change or to act on the results of reflection. If improvement of individuals is to extend to the whole organisation, they say, a third component, '*integration*' will also be needed: individual goals should be integrated with organisational goals.

Principals and teachers interviewed agreed that improvement of individuals' performance and of the work of the school as a whole should be a major purpose of performance review. Processes had been set up accordingly in all schools. They were, on paper at least, seen to be very 'correctly' standards based, linked with professional development and aligned with whole school, department and individual teacher needs and objectives.

However, in practice, the aspect of the schools' performance review systems that seemed to be of most concern to many was how to minimize the amount of everyone's time they consumed - the less time it took, the better the system.

This is not to denigrate the good intentions of principals and teachers. Some principals went to great lengths to find time to speak individually with all their teachers as part of annual performance review. (This involved at least fifty hours of principals' time in one large school). They said that they valued this time highly. Similarly, HODs valued the opportunities offered in review processes to help teachers identify their strengths and areas for improvement, and to assist them with their professional development plans. Teachers felt that the processes validated their work practices and provided opportunities to target aspects of their work for improvement.

We noted, however, that because of the limited time that was available for performance review processes, there was considerable variation in rigour. Principals said that their priority was to develop systems that would not unreasonably add to workloads, especially those of senior managers and the HODs who, in most cases, carried responsibility for appraising the work of staff in their departments. The need for adequate documentation was acknowledged, but some HODs complained of the 'paper work' attached to the school's performance review processes. Clearly some HODs and senior managers took these matters more seriously and devoted more time to them than others.



The main problem, as we saw it, was that if appraisal processes became too perfunctory due to lack of appropriate time and energy being put into them, those involved at all levels might lose sight of the central purposes of those processes: to ensure professional accountability and encourage improvement. If this were to happen, the processes would come to defeat their own purposes. They would thus become little more than a waste of valuable time.

Because of the brevity of our visits, we cannot say that this was occurring in the case study schools. Our observations led us to believe that leaders in these schools had reached sensible compromises. We also noted, however that, mainly because of time constraints, some people with responsibility for teacher appraisal were 'cutting corners' so that processes were, in some cases, failing to live up to their potential to improve the professional lives of teachers.

As a workload issue, then, performance management was observed to carry some ironies and contradictions. If effectively carried out, it should improve teacher workload. But if it is to be effectively carried out, extra work is required. Time put in to ineffective practices is time and energy wasted – time and energy that could be better used elsewhere. Principals and teachers in the case study schools clearly supported the principles of staff performance review. However their main preoccupation in implementing appropriate systems appeared to be the avoidance of self-defeating stress and work overload for all involved.

#### *Education Review Office (ERO) Review*

Three of the six case study schools received Education Review Reports in 2003 or 2004 (the exception was the St James, the independent school.) Reviews were, in all three cases, favourable. Principals, managers and teachers interviewed said that they did not find the Review processes onerous nor did they add, directly, to teachers' or middle managers workloads. Teachers seemed to think of themselves as removed from the ERO Review processes. Most of the work involved appeared to have fallen on principals and members of School Boards.

Although teachers' workload did not appear to be directly affected by the ERO processes themselves, various recommendations for improvement in the reports carried serious implications for increased workload in the future. Reviewers were concerned that teachers should learn to cater more for students as individual learners. Importantly, ERO reports included recommendations that teachers, 'curriculum leaders' and 'heads of learning areas' should learn how to use information about student achievement in the essential learning areas to inform planning, should improve assessment methods to give individual feedback, and include literacy goals in their planning. These are not simple matters. Implementing such recommendations would require, for some teachers, undertaking extensive professional development. This would need to be planned and organized by senior and middle management. (Is there an assumption that senior and middle managers already have the necessary skills and knowledge?) And, apart from the professional development required, such recommended professional practices as using aggregated student data to inform planning and assessment are extremely time consuming. They would require teachers

to work in groups and teams for extended periods of time (e.g.) to study the data, moderate student work samples, and plan for appropriate feedback.

### *The NCEA*

The NCEA emerged as a major, perhaps *the* major external factor impacting on teachers' workloads in most of the case study schools.

Mixed levels of philosophical support for the NCEA were found within all six case study schools. Overall, support appeared to be greater in the government schools than in the independent and state integrated schools. Unsurprisingly, those teachers who philosophically supported the NCEA complained less about workload issues than those who did not.

Specific workload issues connected with the NCEA were given as:

#### NCEA Administrative issues:

- Too much 'paperwork' and entering of data
- Establishing and implementing processes to ensure authenticity of work
- Moderation processes, including time spent resolving difficulties reaching agreement with other teachers
- General administration, e.g. arranging sessions for students to resit

#### NCEA Professional issues:

- 'Struggling' with new concepts based on standards and outcomes
- 'Complexities' of marking using standards and outcomes
- Stress and feelings of inadequacy
- Developing new ways of teaching
- Preparing formative and summative assessments
- Developing materials (and, for the Maori school, translating materials)
- Helping teachers to understand issues and processes
- Co-ordinating teachers' marking

The work was falling particularly heavily on Heads of Department who had been given little or no extra time to perform it and who were carrying out NCEA related duties on top of existing duties like managing the resources of their departments. They felt that there was a limit to the extent 'new' duties could continue to be added without removing others. Teachers said that they depended very heavily on their HODs, for all aspects of NCEA implementation, as this comment from a teacher at Hillary illustrates:

The NCEA has hugely increased (the HOD's) workloads. There is no way we could have done it without them. They prepare the assessments and materials and give us advice. Then they have to co-ordinate the teachers' marking. Does the student deserve the mark? Yes or no? Why? Why not? So many questions take up so much time!

Respondents (regardless of the subjects they taught) said that English and Humanities teachers tended to be more positive about the NCEA than Maths and Science teachers. This was (a) because English lent itself more readily to that kind of assessment and (b) because the quality of the English materials available on websites was very high.

Teachers at St James School were the most critical of the NCEA and the most resentful of the NCEA workload pressures. The International Baccalaureate was also taught at this school. Teachers spoke highly of it and the challenge it offered students. They said that the IB workload was high, but it seemed that their belief in the value of the program led to higher levels of workload tolerance, whereas perceptions of the workload caused by the NCEA were not mitigated by confidence in the assessment.

Teachers who 'believed in' the NCEA and complained least about associated workload issues tended to show advanced knowledge of this kind of assessment, as this comment from the Social Sciences HOD at Hillary demonstrates:

It's a good system. It's about setting up assignments to make sure students reach the standards. It's about using formative assessment to help students, as well as summative assessment. It has some really good aspects, like thinking about how you mark and assess. It's intellectually difficult and challenging. You need to really understand it to do it well.

A teacher at Gladstone High School made similar comments, noting that those teachers who had difficulty with the conceptual issues of the NCEA felt the workload pressures most keenly:

It's a different way of teaching, based on standards and outcomes. Some older teachers struggle with the concepts and some of the new ones haven't learnt anything about it in their (teacher education) studies at university. But the workshops and PD have been very good and it was good that they introduced it slowly, level by level.

It involves an essential change in philosophy. Teachers need to internalise the objectives and the trouble is some of them just don't have that sophistication. But it has great advantages. The kids know what's expected and they discover what they are good at.

Our conclusions, on the basis of the case studies, in relation to effects of the NCEA upon teacher workload were fourfold:

1. There appears to be little doubt that the introduction and implementation of the NCEA added considerably to teachers' workloads. This kind of assessment is highly demanding on teachers' time and professional knowledge and skills.
2. Teachers who understand the assessment principles that underpin the NCEA and have developed good knowledge and skills in this kind of assessment experience the workload as less onerous than those with less understanding and lower knowledge and skill levels.
3. There seems to be a lot of associated paper work and 'administrivia' attached to NCEA implementation in schools. We could not determine, precisely, the

extent to which all of this was ‘necessary’ or how much was being generated at the school, as opposed to the central level. Possibly, adjustments and efficiencies could be developed and communicated to schools. These could include increased use of non-teaching personnel.

4. The role of HODs in implementing the NCEA appears to have been underestimated and undervalued. Most of the work of leading and providing PD for their staff, preparing materials and assessments and co-ordinating implementation processes seems to have fallen upon them. Other tasks have not been removed as compensation and little or no extra time and resource support has been provided.

## **Effective strategies for workload management**

Interestingly, teachers in the case study schools were not receptive to suggestions that their work was being ‘managed’ by anyone but themselves. They seemed to feel a degree of control over the nature, pace and amount of work they ‘chose’ to do:

*I manage it (workload). I like systems and I’m organised. I would drop something if it was (a major problem). (HOD Gladstone High School)*

*I’m the sort of person who will seek out a solution to my situation. I would never blame the school or anyone else. I make the decisions. (HOD St. James School).*

The researchers suspected that these perceptions of ‘control’ were not necessarily matched by the realities of these teachers’ situations. In point of fact the teachers had been assigned a great deal of work and had only a finite number of hours in which to do it. However it did seem to be the case that principals and senior managers, respecting the ‘professional’ culture of schools as organisations, preferred to use indirect, supportive strategies to ‘manage’ teachers work in preference to more directive approaches.

### **Teachers’ own strategies**

Individual strategies used by teachers to manage their work usually included working at home, working in the evenings, at weekends and for part of school holidays. This work was mostly program planning and marking students’ work. Some teachers said that they liked to work in the school buildings when there were few or no students or other teachers present. This gave them relatively unfettered access to equipment as well as quiet time and space to work. Others preferred to work at home. Some had made resolutions not to take work home. These teachers said they ‘coped’ by spending longer time at school, usually after the students had left. One issue for these teachers was that they felt that this was not the most productive time of day, as they were tired after a day of meeting the demands of the classroom teaching timetable and other scheduled activities.

Distinctions between teachers’ ‘own’ time and ‘work’ time outside the classroom were blurred, especially for those teachers with high levels of commitment who ‘loved’ their work. However, some teachers felt overwhelmed by the volume of work and resented the intrusion of work on their private and family lives. Most teachers had

developed personal organisational skills to develop schedules and patterns that seemed to represent some kind of personal compromise. None 'blamed' principals or the school administration for heavy workloads. Some believed that Principals were concerned that some teachers might be overworking themselves. And there was evidence that this was so. One Principal even believed it necessary to protect teachers from their own enthusiasm by locking the school for at least one week during the holidays.

Another workload reduction strategy mentioned by some teachers was to lessen the amount of time they spent on extra curricular activities or to give up these activities altogether. All teachers and principals recognised the value of these activities. In some schools, most notably Hillary High School, extra curricular programs, especially in sport, were part of the traditional fabric of the school and contributed strongly to the positive school 'tone.' At Hillary it was apparent that the high levels of participation in extra curricular activities were resulting in improved student attitudes and better relationships between students and teachers. All of this was invaluable in terms of the school's core goal to improve student learning. In all probability, the good relationships between the students and teachers that arose from the extra curricular program were also easing teachers' workloads as discipline problems became fewer and communication more effective.

Principals encouraged teachers to participate in extra curricular activities. At Hillary this encouragement even extended to material rewards like a weekend family holiday. Some teachers needed little encouragement, especially those who enjoyed activities like coaching football or cricket or debating teams. However no Principal could require a teacher to take on extra curricular work. When required to take on some new duty on top of their existing compulsory 'load' some teachers felt that their last avenue of relief was to give up extra curricular work.

### **Strategies used by principals and senior management to manage teacher and middle manager workload**

With the possible exception of the Te Kura o Te Ra, where responsibility was evenly shared and a 'family' atmosphere prevailed, the formal management arrangements in the case study schools followed recognisably traditional patterns that are common to most secondary schools.

In all the schools, principals were well aware of the work pressures upon teachers. They sought to minimise these pressures but said that making choices within limited resources was often difficult. For example, they knew that choosing to employ extra support staff to remove some administrative work from teachers would result in larger classes if it caused an increase in the ratio of students to teachers. All principals were treading a fine line in these matters. Common strategies included keeping the number of meetings to a minimum, having an overview of all meetings that teachers were required to attend, ensuring that meetings were for specific purposes, and, where possible, holding meetings at convenient times for teachers.

Another strategy used by school administrators was to 'filter' demands coming from outside the school. As one principal said:

It's the role of senior management to prioritise. Everything that comes across my desk – every single thing – has a benefit. But for every potential benefit there is a cost. Our task is to be aware of the costs and weigh up the benefits in terms of workloads. You can't just pile one thing on top of another so that it never ends. It's just not possible to take on everything.

Every time something new comes out someone filters it through.

'Filtering' means that somebody makes decisions about what is of greater or lesser benefit. This raises questions about the extent of consultation and teacher participation into decision-making processes in schools. Finding answers to these questions and implementing the results are workload issues in themselves, which almost certainly involve middle managers and at least some teachers.

Principals and managers in the case study schools were monitoring teachers' work through staff appraisal and performance review processes. In some schools, these processes were such that they helped principals to gain a better understanding of teachers' and middle managers' workloads and ensured that they, the principals, fulfilled their part of the bargain, as far as possible within time and financial constraints, by providing the support necessary for teachers to work effectively.

For example, in some of the case study schools the principal made time to speak individually with every member of staff as part of the performance review arrangements. The processes were seen as reciprocal: principals monitored teachers' workloads and, importantly, their capacity to carry out their work, in a realistic and personal way. The teachers, for their part, were encouraged to detail their workload concerns and to expect from the principal an understanding of their needs plus guarantees of support.

An extension of this strategy was for principals to meet regularly with middle managers who had responsibility for staff performance management and to use these meetings to gain better awareness of workload issues.

Workload stresses become acute when people lack the necessary knowledge and skill to perform required tasks. Elmore (2000 p.21) notes that

*The exercise of authority requires reciprocity of accountability and capacity:* If the formal authority of my role requires that I hold you accountable for some action or outcome, then I have an equal and complementary responsibility to assure that you have the capacity to do what I am asking you to do.

One outcome of a successful performance management system, therefore, would be that principals held themselves responsible and accountable for ensuring that teachers and middle managers were able – had the necessary 'capacity' – to perform the work expected of them.

We saw the best example of such an outcome at Gladstone High School, where every effort was being made to provide teachers with the knowledge and skills to work

effectively as competent professionals. This school has developed carefully constructed and implemented professional development activities that are linked to performance review and aligned with a whole school vision. Participation in most of these activities is voluntary, but teachers understand their intent, and value the learning opportunities they present:

The culture of the school is very directed to teaching and learning. We are fortunate that the principal and senior management are so aware of what that means for staff workloads. (The principal) talks one on one with staff every year as part of the performance review system. We have had very good feedback. This is a very IT literate school, and that helps a lot with workloads. Also PD (helps). One teacher said that the PD she has had at Gladstone has been the best in 25 years of teaching. (Jim, Board of Trustees Chair, Gladstone High School)

The IT 'literacy' of staff was, indeed a notable feature among teachers at this school. It provided a highly visible example of how 'capacity building' can lighten teachers' workload as it makes their performance more effective. Other examples of this same principle were also observed among teachers at Gladstone, such as more sophisticated understanding of assessment theory and practices, student diversity and individual learning patterns. In different, less visible, but no less significant, ways, these elements were observed as having a positive influence on the working lives of teachers.

## **Summary**

This section of the study attempts to draw together the findings from case studies conducted in six New Zealand secondary schools.

The research aims of the case studies were to:

- Obtain information about the workloads of teachers in New Zealand secondary schools
- Identify factors, including those beyond the present control of individual schools, that were affecting teachers' workloads
- Identify the various ways in which teachers' work was 'managed'
- Consider areas where improvements could be made
- Discover and discuss examples of effective management strategies.

## **Case study findings**

### **1. Hours worked per week**

The total average hours per week worked by teachers without management responsibilities was 43 (based on teachers' own estimates at the interview).

The total average hours per week worked by middle managers was 51 (based on middle managers' own estimates at the interview). This comprised scheduled classroom duties and management duties.

### *Work done at home and outside the school's hours of operation*

The main work done at home and outside the school's hours of operation was marking and preparation. Teachers chose to do this work at home or before or after school or at weekends rather than during non-contact periods because:

- Time in non-contact periods was too short for sustained work
- Time in non-contact periods was subject to constant interruptions from students and colleagues
- Sometimes they preferred to 'just chill out' in non-contact periods, especially after a 'difficult' class
- They had other duties, e.g. meetings with colleagues during non-contact periods
- Facilities such as photocopiers and computers were less available during the regular school day
- They lacked satisfactory office space in which to perform this kind of work at school.
- They liked to work long quiet periods of time. Home provided this. Schools did not, especially during the hours of school attendance.
- Home provided a more relaxed and pleasant environment in which to work than school
- Working at home, especially on weekends, allowed them more flexibility

## **2. Teachers' perceptions of workload**

### *Overall perceptions of manageability of workload*

Almost all teachers described their workload as 'heavy', but said it was manageable, most of the time. A significant number said that at certain 'peak' periods workload exceeded their capacity to manage it and that this negatively affected their work with students.

### *Perceptions of control over workload*

Most people interviewed said that they felt reasonably high levels of control over the nature, amount and pace of their work. These positive perceptions appeared higher in the government schools than in the state integrated and independent schools. Teachers in the government schools were satisfied with the amount of input they, or their chosen staff representatives had into important decisions that affected their work. However, the researchers felt that some teachers' perceptions of being in control were, to some extent, incompatible with their descriptions of workload stress.

### *Teachers' perceptions of how their workload was 'managed'*

Teachers were unreceptive to the suggestion that someone other than themselves was 'managing' their workload. They liked to think that this was their responsibility.



Management of teachers' work by principals and senior management was viewed by teachers in terms of providing the leadership, conditions and support that would allow them to work most effectively.

### **3. Factors that affected workloads in the case study schools**

#### *School based factors*

##### *High levels of personal commitment*

All teachers interviewed, especially middle managers, shared high levels of personal commitment to their work. In some cases, especially among teachers in the non-government schools, this appeared to be causing overwork and stress.

##### *Student behaviour/pastoral care*

Teachers at the state integrated, independent and Maori medium schools and at Hillary Boys' High School said that student misbehaviour was not an issue that affected their workloads. We recognised that these schools cannot be described as typical in terms of student cohort. Further discussion of this point will be made in the discussion of other schools visited as part of the fieldwork phase of this study.

At Gladstone High School and at West Island Area School, teachers said that managing problems of student behaviour contributed significantly to their workload. Hillary Boys' High School had developed particularly effective systems for dealing with student behaviour.

##### *Resources and support*

Most of the people interviewed were satisfied with the physical resources in their schools. Teachers had their 'own' classrooms and desks shared space in staffrooms. Middle managers typically had offices that they shared with one or more middle manager colleagues.

All said that they needed more administrative and secretarial support for such tasks as photocopying, help with entering and processing electronic data, preparing student worksheets, general word processing and typing.

The Hillary Boys' High School school support centre provided a good example of the capacity of generous, well deployed physical and human resources to increase teachers' effectiveness and reduce workload.

Teachers at St James School worked in an exceptionally pleasant environment with excellent physical resources and generous administrative support. But most teachers interviewed at this school said that they felt overworked.

The resource in shortest supply was time.

### *Leadership and vision*

Although details of school vision statements varied between schools, teachers in all schools shared a common vision that was articulated in school policy documents. All teachers and middle managers showed clear understanding of the schools' goals and felt themselves to be working towards these goals. Most teachers and middle managers interviewed were strongly supportive of their principals' leadership.

Te Kura O Te Ra school, which aimed to improve the life chances of Maori students through 'immersion' language education provided a strong example of how a shared vision and sense of common purpose can energize teachers and make their work more meaningful and enjoyable. However, the fact that some teachers at this school were 'driving' themselves to the point of overwork suggests that efforts to achieve the vision need to be tempered by realistic understandings of the amount and nature of the work entailed. Similarly, at St James School, where achievement of 'excellence' permeated the culture, teachers said that while they felt pride in their school and its attainments, the workload costs were great.

### *Professional community and professional learning*

High levels of professional community, matched by generally high commitment to continuing professional learning were found in all case study schools. Subject departments, led by HODs were the main units of professional community and learning. Most schools also provided opportunities for teachers to work and learn together in cross-faculty teams and groups. Gladstone High School had an excellent system of voluntary professional learning groups. These were also led by HODs.

### *ICT*

People interviewed in all six schools agreed that the effective use of ICT had great potential to increase their effectiveness and alleviate workload. But the majority were not confident that they possessed adequate ICT skills. The exception was Gladstone High School, where, as a result of effective training and of collegiate support and commitment to professional learning, skills and confidence were high.

### ***Government Requirements***

#### *Performance review (Staff appraisal)*

Systems for staff appraisal/performance review were in place in all schools. The main purpose of these systems was to ensure (a) that staff could be held accountable for their performance and (b) to provide opportunities for staff to reflect on and improve their performance.

A major concern of principals and teachers was to keep to a minimum the amount of time spent on performance review processes. The researchers noted variations in rigour and time devoted to the processes between schools and between individuals who had responsibility in this area. The dilemma seemed to be that while performance management systems had the potential to alleviate workload through facilitating

improved practice, they could only do this if sufficient time and energy were being invested. Such investment, of course, would add to workload.

Principals in the case study schools seemed to have made reasonable compromises that minimized workload demands on all involved. But the extent to which these processes were improving performance, thereby mitigating negative influences on workload is questionable.

#### *Education Review Office (ERO) Reviews*

With the exception of St James (the independent school) all case study schools had been reviewed in 2003 or 2004. Teachers and middle managers said that the reviews did not directly affect their workload. However, various recommendations in the reports, e.g. to improve processes for catering for students' individual needs and to refine processes for the gathering and use of student achievement data, carried serious implications for future workload, especially for that of middle managers.

#### *The NCEA*

In most case study schools (the main exception was West Island Area School which had few students at NCEA year levels) the NCEA appeared to be a major, perhaps the major external factor that was impacting on teachers' workloads.

Specific workload issues connected to the NCEA were:

#### **Administrative issues**

- Too much 'paperwork and entering of data'
- Establishing and implementing processes to ensure authenticity of work
- Moderation processes, including time spent resolving difficulties with other teachers
- General administration, e.g. arranging opportunities for students to resit assessments.

#### **Professional issues**

- 'Struggling' intellectually with new concepts of curriculum and assessment based on standards and outcomes
- 'Complexities' of marking, using standards and outcomes
- Stress and feelings of inadequacy
- Developing new ways of teaching and coping with change
- Preparing formative and summative assessments
- Developing materials (and, in the case of the Maori medium school translating materials).
- Helping other teachers to understand the issues and processes
- Co-ordinating teachers' marking

This work was falling particularly heavily on HODs who had been given little or no extra time to perform it and who were carrying out NCEA duties on top of existing duties like managing the resources of their departments. They felt strongly that there were limits to the extent that new duties could be added to their workload without

removing others. For some, the NCEA had crystallised their perceptions of how much they could reasonably be expected to do.

#### **4. Effective strategies for workload management**

##### *Teachers' own strategies*

Teachers believed that they carried chief responsibility for managing their workload.

Strategies they used included:

- Effective use of time management and organisational skills
- Reducing/varying the amount of time spent on schoolwork at home or outside of school hours
- Prioritizing tasks
- Giving up voluntary and extra curricular duties when pressure of prioritized tasks and scheduled work became too heavy
- Giving up positions of responsibility, if the associated tasks were affecting their work with students

Strategies used by principals and senior management to manage teachers' workload were facilitative and supportive rather than directive. They included:

- Using support staff to relieve teachers of non-professional duties such as photocopying
- Minimising the number of meetings and using meeting time effectively
- Effective delegation
- Prioritizing tasks
- 'Filtering' demands from outside agencies
- Being responsive to teachers' concerns and acting promptly to resolve them
- Using performance review to monitor staff performance and attend to workload issues
- Ensuring effective communication at all levels, especially between middle and senior management groups.

A valuable strategy for managing teachers' workload was that of capacity building. At Gladstone High School every effort was being made to provide teachers with the knowledge and skills they needed to work as competent professionals. The most visible outcome of this strategy was the staff's competence in ICT, but, clearly, there were many other ways in which building teachers' capacity to perform their work had lightened workload as it made performance more effective.

#### **Discussion of findings in relation to the literature**

##### **'Professionalisation' and the expanded work roles of teachers: effects on workload.**

Lieberman and Miller (2000) point to an increased 'expanded role' for teachers that has emerged as a result of site based school management and efforts by reformers to

'professionalize' teaching. Performance of this expanded role entails teachers looking beyond their classrooms to assume wider, shared responsibility for whole school curriculum development, student welfare, assessment systems, and pedagogical improvement. Increasingly, evidence shows that teachers who experience personal involvement within the wider context of a collegial whole school community and shared responsibility and accountability are more likely to remain engaged and committed. (Bryk & Driscoll, 1988; Miller, 1999; Mclaughlin & Talbert 2001.)

Our findings showed that teachers, especially middle managers, and especially HODs were performing a wide range of professional duties in addition to their actual classroom teaching. These duties were mainly in the areas of curriculum development and assessment, but they included pastoral and co curricula activities. The leadership role of middle managers, especially the HODs, in leading these activities was crucial. The NCEA was generating, not just compliance, but new and complex ways of thinking about curriculum and assessment. This, in turn, generated new intellectual problems and challenges for teachers and HODs. We found that HODs, in most cases were the academic leaders, professional developers, and forgers of professional community in their departments, as this comment from a HOD at Gladstone High School illustrates.

I spend the bulk of my (non teaching) time helping teachers to reassess their priorities for teaching and learning. It's a careful business. We don't like slash and burn curriculum here, don't believe it is right. And we like to learn from what other schools are doing. I even went to Glen Waverley Secondary College (an ICT 'lighthouse' school in Melbourne.) They are doing wonderful stuff. I want to help the teachers do wonderful stuff here. (HOD Gladstone HS)

We also found that little or no accommodation had been made, in terms of time or other support, for these expanded roles of HODs.

Our findings also supported the research of Bartlett (2004; 1996) that showed that teachers tend to persist in striving to attain high personal standards for reasons of personal commitment rather than extrinsic reward or pressure from management. Bartlett (2004) studied the work of teachers in two schools in the US, whose work had expanded in line with new conceptions of teachers' professional roles. The study examines the relationships and tensions between the performance of the work and the resulting strains and demands on teachers' workload. In interviews with teachers, Bartlett and her colleagues found a prevalence of teachers who spontaneously and, from her researchers' point of view 'unexpectedly' demonstrated intense personal commitment to the achievement of high standards in accordance with their own, internalized conceptions of professionalism. They observed a tendency for teachers to determinedly 'persist', even when sufficient support was lacking. They were concerned to discover the extent to which such persistence might be a cause of teacher overwork.

We were not surprised, in the present study, to discover similarly high levels of professional commitment in teachers in New Zealand secondary schools. In common with Bartlett, we recognised that these high levels of commitment and personal involvement were not motivated by extrinsic factors such as income or status or by

the need to meet external requirements. We also agreed with Bartlett about potential for work overload in expanded work roles, however much teachers might welcome the opportunity for increased professional involvement and influence. In particular we were interested to discover:

- (a) why teachers felt such high levels of personal professional commitment
- (b) what were the effects of high levels of personal professional commitment and expanded work roles on teachers' workloads
- (c) what factors might exacerbate workload and stress for these highly committed teachers
- (d) what factors might reduce workload, alleviate stress and help these teachers to carry out their roles to the high standards that they themselves envisaged

Bartlett (2004, p. 575) cites two mainstream 'overwork theories' from the literature. The first, (Schor, 1991,1999) is that people overwork because of the desire for increased income. The second, (Hochschild, 1997) is that people prefer work to home, for reasons that include experiencing greater comfort and security at work than at home, escaping family relationship complications and feeling a greater sense of reward and accomplishment at work. Bartlett finds Schor's theory unpersuasive in the case of teachers: 'There is little or no financial gain for teachers who overwork' (p 575). The second theory, she says, has more relevance to the lives of teachers, but this theory is also limited. High schools are 'generally more primitive workplaces than those of the private sector employing individuals of comparable educational attainment.' (p. 575), and teachers do not have the same social contacts with other adults that other workplaces can offer.

Bartlett (p.575) offers three explanations for teachers' 'persistence' and 'striving':

- (1) teachers' equation of the expanded role with good teaching practice,
- (2) the moral imperative of teaching, and
- (3) the desire to live up to the expectations held by themselves and their colleagues.

Of one group of teachers in her study, she says that, even in the absence of adequate support they:

are unable to abandon the expanded role conception easily because it has become a standard of good teaching they have internalized. Abandoning the expanded role would require them to either accept a lower professional standard of themselves or redefine what it means to be a good teacher.

Bartlett observed that since mainstream theories of overwork were insufficient to account for some teachers' tendency, an 'alternative theoretical frame of overwork for teaching 'might be needed':

This research suggests an alternative theoretical frame of overwork for teaching – based on the commitment of care workers to live up to moral obligations determined through individual and collective conceptions of what it means to be professionally responsible and

proficient. Professionals who rely on intrinsic and psychic sources of motivations – like a personal sense of satisfaction based on serving students well and living up to notions of good teaching – may not be able to reconcile themselves to doing less. Letting work slide may be perceived as letting people slide, and thereby shirking a moral obligation and sacrificing an essential source of reward.

Importantly, Bartlett's study revealed that in a school where teachers were 'persisting' with self imposed determination to maintain high professional standards in the absence of support, teachers were becoming severely overworked and stressed. This was resulting in high levels of dissatisfaction, reduced effectiveness and increased attrition. In the other school of the study, where teachers were supported and given time for their expanded role the researchers found no evidence of overwork. This suggests that further attention needs to be paid to the organisational and other factors that may support or constrain teachers' ability to live up to their own conceptions of good teaching.

Bartlett's analysis sheds light on some intrinsic factors that cause teachers to overwork. It alerts us to the fact that identification of increased teacher workload as an undesirable effect of site base school management (Leithwood et al, 1996; O'Connor & Clark, 1990; Wylie, 1997) needs to be illuminated by understandings of what motivates teachers to work harder.

## **Organisational factors that affect teachers' workload: strong subject departments or cross-faculty structures?**

The New Zealand researchers Helen Timperley and Vivian Robinson (Timperley and Robinson, 2000, p. 47) suggest that 'Teachers not only suffer from workload problems but also create them' because of their acceptance of the ways schools are organized:

'organising principles developed to meet the challenges of managing single cell classrooms, such as individualism, autonomy (Bush, 1995; Fullan, 1993; Little, 1990; Smyth, 1996) and strong subject department identity (Johnson, 1990; Lee et al, 1993; McLaughlin & Talbert, 1990; Siskin, 1994) impede the systemic thinking (Senge, 1992; Sterman, 1994) required for developing coherence in reforms which go beyond the unit of the classroom or department.

Subject departments were the core organisational units for staff at Hillary High School. One possible example of the type of organisational problem posed by Timperley and Robinson was that of the Maths teacher at this school who so strongly objected to the NCEA assessment and the curriculum principles that underpinned it. While other teachers in the school, including Maths teachers, moved towards this kind of assessment, this HOD was becoming increasingly uncomfortable, so much so that he had decided to leave teaching after a long and successful career. This man complained of very high workload and stress problems that he attributed to the introduction of the NCEA. He claimed that other teachers in his department were experiencing similar problems, for the same reason. (Other teachers and the principal did not completely agree with this.)

Does this example support Timperley's and Robinson's arguments that 'organising principles' such as 'strong subject department identity' 'are likely to result in increased workload through fragmentation, duplication of effort and the addition of new tasks to those already existing' (Timperley and Robinson, 2000)? Was the effort expended by teachers in the Maths department of this school on the NCEA an example of 'Balkanisation' (Fullan and Hargreaves, 1992) as teachers struggled within the isolation of their subject departments to understand the new concepts in comparative isolation, thereby causing unnecessary workload and stress? Would more cross faculty sharing of effort and weaker 'subject department identities' have made acceptance of the new initiative easier for this man and other teachers in the Maths department, and caused less workload?

Such questions about the ways in which schools are organized are highly significant in a climate of constant change and increased teacher involvement in and responsibility for implementing change. If older, traditional ways of organizing teachers, e.g. within subject departments, are impeding change and increasing workload, then new ways may need to be found. However, we would advise caution. We agreed with much of the general thrust of Timperley's and Robinson's arguments. However, apart from the example above, we found little evidence of this kind of problem in the case study schools, all of which had robust subject departments.



Indeed, the main collegiate and professional learning group, for all teachers interviewed, was their subject department. This fact did not appear to be causing the fragmentation or duplication of effort, with resulting overwork, that Timperley and Robertson feared. Nor did it appear to be inhibiting progress in 'reforms' that affected the whole school, most obvious of which was the NCEA. Most of the work associated with the NCEA was being done in departmental groups led by the HODs. Certainly some tension was evident between members of some departments in some schools. Some Maths teachers felt that the NCEA assessment was more in tune with ways of teaching English than Maths. All Maths teachers felt that the NCEA materials available to English teachers were superior to those in other subjects. But understanding and acceptance of the actual NCEA assessment principles and methods varied more between schools than subject departments. This had more to do with whole school values and attitudes than organisational structures. Our observations in the case study schools led us to concur with Huberman's conclusion (1990: 5) that:

From the artisan's logic, I would rather look to the department as the unit of collaborative planning and execution (since) in a secondary school this is where people have concrete things to tell one another and where the contexts of instruction actually overlap.

### **Professional community and learning and their effects on workload**

Rozenholtz (1989) in her classic study of 78 elementary schools in Tennessee classified the schools as 'stuck' 'in between' or 'moving'. The 'stuck' schools were characterized by teacher dissatisfaction, isolation and the learning impoverishment of teachers and students. In the 'moving' schools, there were high degrees of teacher interaction that resulted in happier, more engaged teachers and students. For teachers, maybe the most important thing about working in a 'moving' school was the extent to which this promoted their own professional learning and development. Eighty percent of teachers in Rozenholtz's 'moving' collaborative schools actively sought out opportunities for learning, especially from colleagues. By contrast, in the 'stuck' schools, only seventeen per cent of teachers felt the need to learn from others in order to become better teachers.

While it is obviously difficult to describe whole school cultures on the basis of one visit, the researchers in our case study schools did not believe that any of the six schools should be placed in the 'stuck' category. All schools had strong, if different, shared visions and goals. Very high levels of commitment and willingness to learn were apparent in the great majority of people interviewed.

Gladstone High School provided a particularly strong example of McLaughlin's and Talbert's vision of a strong teacher learning community. The quotation below could have been written about the teachers at Gladstone:

Chorus and refrain in our study of teaching and our understanding of the conditions that support teachers' learning and change is the critical importance of professional discourse and inquiry. Opportunities for teachers to talk with colleagues about teaching, consider new ways of doing things, and hammer out shared understandings about goals were

common across diverse environments where practices were re thought in ways that benefited both teachers and students. Teachers' ability to respond effectively to the diverse needs, interests, and talents students bring to their classrooms and to implement principles of teaching that motivate reform will depend upon their ability to have these relationships. (McLaughlin & Talbert, 2001:131)

Such 'learning opportunities' do not come about by accident. At Gladstone a sustained effort, generated by the school leadership team, was being made to develop a positive and collaborative learning culture. Teachers participated voluntarily in cross faculty professional 'learning teams' to explore major ideas in education, discuss research based teaching strategies, undertake action learning projects, build assessment skills, and generally reflect on practice and shared language.

While Gladstone provided excellent examples of whole school professional collaboration and learning, it also had strong subject departments. Here, as in the other case study schools (with the possible exception of Te Kura O Te Ra), the subject departments were found to be important and well functioning nuclei of professional community and professional development. This finding was in line with current research on the contexts of secondary school teaching:

Research on the multiple contexts of teaching supports the proposition that communities of teachers – based in collegial networks, departments, whole schools or districts – constitute the meaningful unit and potential for teacher professionalism in US education. We expect that strong teacher communities foster a shared knowledge base or technical culture, shared commitment to meeting the needs of all students, and durable professional identities and commitments. Conversely, without opportunities to acquire new knowledge, to reflect on practice, and to share successes and failure with colleagues, teachers are not likely to develop a sense of professional control and responsibility. (Talbert & McLaughlin, 1996, p.130)

Teachers described numerous instances of the way HODs fulfilled their key role of building professional community among teachers. This work was centred mainly, but not solely, within subject departments. It usually involved organizing regular meetings and activities where groups of teachers were united around solving 'problems of practice' (McLaughlin & Talbert, 2001:127), as they shared ideas, developed assignments and programs of work, discussed teaching strategies, and assessed students' work. All of these activities contributed, powerfully to the professional learning of the teachers:

Anthropological research on adult learning in 'communities of practice' (Lave and Wenger 1991; Wenger 1998) identifies key elements and dynamics of professional learning communities and helps to define challenges for framing the work of teacher communities. Such communities are characterized by mutual engagement, joint enterprise, and shared repertoires of practice (such as materials and concepts). This literature from outside education raises a key issue for the future of high school teaching: around what problems of practice

will teachers share their work and build community? (McLaughlin & Talbert 2001)

Teachers in all case study schools also described how HODs encouraged them to undertake professional development (in a number of cases this overlapped with their performance review responsibilities). They said that they appreciated time spent in subject department meetings, because they believed that often, this well spent time actually saved them work. Some said they could not imagine working without it. In many ways, they said, the work done by HODs helped to alleviate their own workloads. They were especially appreciative of the HOD's work in seeking and sharing resources, including on line resources, and developing assignments and assessments.

## ICT

A growing body of research is showing that effective use of ICT can have positive effects on teachers' workloads. Benefits can include:

- Improved communication and greater efficiency throughout the school (Greene et al. 2002)
- Improved home-school links through greater access to information for parents (Becta, 2001); Less duplication of effort when improving curriculum materials and reports (DfES, 2001);
- Potential to allow teachers more non contact time (PwC, 2001)
- Better management of student administration, including transition and transfer arrangements through electronic data transfer (Irving, 1998)
- Greater collaboration between teachers in planning and preparing resources, resulting in higher quality curriculum (Ofsted, 2002)

Information gathered in the case studies overwhelmingly supported the conclusion of the PriceWaterhouseCoopers teacher workload study (PwC, 2001) that:

given the right conditions, a wide range of benefits can be achieved: particularly where Headteachers are enthusiastic and visional about ICT; where it is appropriately deployed and supported and where time has been provided for high quality training in the use of software. (PwC, 2001)

In particular, we agreed with the PwC researchers that:

The introduction of ICT facilities should support both the workload and that (sic) standards agenda, although we have observed that, where ICT is introduced without a coherent strategy and where teachers are inadequately trained and supported, their workload can be increased without commensurate benefit.

The following table was compiled as an attempt to discover the extent to which varying financial circumstances in the case study schools (excluding St James, for which figures were not available) might help to account for differences in workload or teachers' perceptions of workload between the schools. It was subsequently realised, however, that a much more detailed audit, including a comprehensive analysis of individual school financial arrangements, would be needed before any meaningful conclusions could be drawn. (What was to be made, for example of the figure '0.0' that was given as the amount spent on teacher development at Hillary Boys' High School, when the teachers in that school clearly showed the benefits of extensive professional development?)

It was decided to include the table, however, for interest, and as a guide to possible further interpretation and analysis.

*Table 10: School Financial Arrangements*

School	Padua	Gladstone	West Island	Te Kura	Hillary
Income	3,928,260.00	6,832,522.00	1,712,825.00	1,662,365.00	9,568,000.00
Govt Grant (Salaries)	2,120,389.00	3,842,594.00	1,151,314.00	898,713.00	4,879,068.00
Income less salaries	1,807,871.00	2,989,928.00	561,511.00	763,652.00	4,688,932.00
Student roll	545.00	1,191.00	279.00	238.00	1,445.00
Per Student Funds	<b>3,317.19</b>	<b>2,510.43</b>	<b>2,012.58</b>	<b>3,208.62</b>	<b>3,244.94</b>
Personnel (teachers & teacher aides) funds	2,220,573.00	4,470,550.00	1,266,445.00	973,816.00	5,069,084.00
Schools own staff funding	<b>100,184.00</b>	<b>627,956.00</b>	<b>115,131.00</b>	<b>75,103.00</b>	<b>190,016.00</b>
Roll generated teaching staff	33.70	64.90	16.60	21.40	86.23
Teacher Student Ratio	<b>16.17</b>	<b>18.35</b>	<b>16.81</b>	<b>11.12</b>	<b>16.76</b>
Locally raised funds	1,083,784.00	1,333,774.00	137,767.00	100,879.00	2,472,382.00
Locally raised funds per student	<b>1,988.59</b>	<b>1,119.88</b>	<b>493.79</b>	<b>423.86</b>	<b>1,710.99</b>
Curriculum support	180,987.00	606,017.00	91,441.00	69,750.00	1,301,073.00
Curriculum support per student	<b>332.09</b>	<b>508.83</b>	<b>327.75</b>	<b>293.07</b>	<b>900.40</b>
Teacher development	29,500.00	13,566.00	17,810.00	6,666.00	0.00
PD per teacher	<b>875.37</b>	<b>209.03</b>	<b>1,072.89</b>	<b>311.50</b>	<b>0.00</b>

## **CHAPTER SIX: RECOMMENDATIONS ON AREAS WHERE GREATEST IMPROVEMENT COULD BE MADE AND CONCLUSIONS**

### **Areas where improvements might be made**

Few statistically significant relationships were found in this study between actual workload or perceived workload manageability and school size, geographic location (urban rural), type of school, governance, decile level, ethnicity, single-sex and co-ed schools. Where relationships existed they were weak.

Multi-level analysis of the survey data also indicated that differences between schools accounted for much less of the variance in the workload measures than differences between teachers, particularly individual ability to cope with stressors. For example, school level variables such as leadership and collaboration were not associated with variation in the workload measures. Stressors common to most schools, such as amount of non-contact time, amount of paperwork, number of support staff, hours at school, and performance appraisal were found to be much more strongly associated with the manageability of workload

This suggests that the focus of policy efforts in response to the workload issue needs to be more on conditions set at the system level rather than school level variables. There is not much leeway for individual schools to do much about stressors such as the paperwork associated with compliance requirements. This study indicates that the factors that affect workload are, in one sense, common to most teachers and managers in schools. What appears to affect perceived workload is the differential capacity of teachers to make their work manageable within the demands and constraints set by the current level of resourcing and staffing of schools.

This is not to say that there is nothing that school managers can do at the school level to assist teachers to manage their workload. But it is to say that the main factors affecting perceived workload appear to be framed more at the school system level than the individual school level. This needs to be borne in mind when considering areas for possible improvement.

For convenient reference, the following recommendations for areas for improvement are identified at the levels of:

- The system
- The school
- Individual teachers

However, there are obvious instances of overlap between these levels.

## **The system level:**

### ***1: Compliance***

The research findings suggested that demands for compliance were falling most heavily on the work of principals. In the section of the survey that asked for principals', managers and teachers' suggestions to improve the manageability of their work, principals placed 'simplified compliance requirements' at the head of their list and principals interviewed in the fieldwork phase of the research said that compliance requirements absorbed a great deal of their time. This may be a matter for concern, especially considering the growing realisation of the importance of educational leadership in schools. (Elmore 2001). However, since this study was concerned mainly with the work of teachers and middle managers, the work being performed by principals was investigated not as a phenomenon in itself, but mainly as it affected the work of managers and teachers. In this respect, principals interviewed showed that they were trying to protect teachers and managers from possible workload caused by compliance with requirements of authorities and agencies outside the school.

There may be value in examining whether a distinction needs to be made between compliance and accountability. Compliance and accountability may be thought of as alternative approaches to quality assurance. 'Compliance' emphasises fidelity to policy and planned commitments, 'accountability' emphasises post-hoc answerability for autonomous actions. A balance is obviously needed, but accountability is more appropriate to the nature of professional work where a degree of trust is invested in people in return for an accurate account of their activities.

System level demands that affected the workload of managers and teachers fell into two main categories (i) curriculum and assessment requirements (ii) performance review. The effects of system level requirements were being felt more by senior managers than middle managers and more by middle managers than by teachers.

### ***Area 2: curriculum and assessment requirements, the NCEA***

The main workload factor in this area that affected the work of middle managers and teachers was the implementation of the NCEA. This accounted for a significant proportion of non-scheduled activities time, but evidence was found, in the survey responses and fieldwork, that the negative effects on workload of NCEA implementation, though still significant, were abating.

Teachers and managers who expressed strong philosophical opposition to the NCEA were much more inclined to resent it as an 'imposition' on their workload than those who accepted its approach to assessment and underlying curriculum principles. These people tended not to resent the professional duties associated with NCEA implementation. In fact they welcomed the challenge of the NCEA and found it helpful in improving student engagement and achievement. Some Heads of Department said that working on NCEA related activities with teachers provided welcome opportunities to exercise professional leadership.

Some resistance to the NCEA may have arisen because some teachers had not had sufficient opportunity to learn about the curriculum and assessment principles that

underpin it. It is not uncommon in the research literature to find that teachers resent implementing changes which they have not a chance to accept and internalize. Teachers cannot be expected to implement complex curriculum changes effectively if they do not fully appreciate them. Changes to teaching and assessment methods that are dictated by compliance rather than by acceptance and understanding on the part of teachers are unlikely to succeed. Any such attempts are also likely to increase teachers' frustration, and influence their perceptions of manageability of workload.

Dissatisfaction with the NCEA and associated dissatisfaction with workload (among teachers and managers who philosophically supported the NCEA) was twofold. First, these teachers and managers objected to the amount of 'paperwork' connected with the moderation and assessment requirements; second, they felt that they were spending unnecessary time creating resources that should have been made available centrally. (English teachers were seen to be more advantaged in this area than teachers of other subjects. Language and Maths teachers tended to feel more aggrieved).

These findings suggest that:

- (a) It is essential to 'win the hearts and minds' of teachers and to ensure that they fully understand and appreciate the need for proposed curriculum and assessment changes before being required to implement those changes. The extensive literature on change management in schools shows that areas such as effective leadership, strong professional learning cultures in schools, and professional development must be paid due attention if change is to be effective and positive perceptions of workload manageability are to be achieved. This aspect also carries implications for initial teacher training.  
There may need to be a revisiting of the compliance requirements that seem to be creating excessive 'paperwork' for managers and teachers in this area. (See comments under Area 5 below.)
- (b) More resources, especially on-line resources need to be developed to support teachers in implementing the NCEA. These should include subject specific resource material and other more general curriculum and assessment materials.
- (c) More clerical support may be needed to assist teachers and managers with such aspects as recording assessments and data entry.
- (d) There needs to be more and improved used of ICT.

### ***Area 3: performance review***

Evidence from the case study schools and survey responses showed that that actual performance review processes varied between schools. Principals in the case study schools were concerned to make performance review processes as simple and 'unthreatening' as possible and the survey findings showed that they seemed to be succeeding, especially with teachers, for whom performance review was only a moderate 'stressor' affecting their perceptions of the manageability of workload. Managers spent more time on review processes than teachers, and, in the fieldwork schools, some reported extreme difficulty finding the time, especially, for observing

teachers' work in classrooms, largely because they themselves were usually teaching at the same time as the teachers whose performance they wished to observe.

The findings that relate to compliance in the area of performance review suggested that school personnel, including principals would welcome greater trust on the part of education authorities. Principals, managers and teachers recognised the need to be accountable, but felt that the amount of paperwork connected with present processes was excessive.

Assessing the effectiveness of performance review processes in schools was beyond the scope of this study. We have suggested elsewhere that the suitability of these processes for the professional work of teachers and the manner of their implementation in schools warrants further investigation and consideration. (Ingvarson 2001; Kleinhenz and Ingvarson, 2004.) In terms of workload, it needs to be remembered that any time and energy spent on ineffective or inefficient processes is time and energy wasted.

(See also comments in Area 5 below)

#### ***Area 4***

##### *The nature and pace of change*

Although changes emanating from system level requirements did not rate highly as stressors in the survey responses, teachers in the fieldwork phase of the study said that system level administrators did not seem to take into account the difficulties schools experience in accommodating such changes. In particular they complained that new initiatives, all requiring more work, seemed to be continually 'raining down' upon them without thought being given to taking other work away.

Improvements, 'customer service' and communication/liaison between central agencies and schools would appear to be needed in this area.

#### ***Area 5***

##### *The amount of paperwork*

Amount of paperwork was one of the highest workload stressors for respondents in the principal, manager and teacher categories. It related to perceptions of lack of trust of school personnel to perform their work effectively. People were prepared to 'go the extra mile' in tasks that related directly to their work with students, but were impatient with form-filling exercises that, from their point of view, took away precious time they would prefer to be spending with students or student related activities.

A considerable amount of paperwork appeared to be generated by the NCEA. It is possible that some of this work could be done by non-teacher personnel, but a distinction needs to be made between the professional written work that is necessary to devise and complete considered assessments, and paper work that is little or no more than simple recording of information.



Like other negative teacher comments about NCEA related workload, some objections to NCEA paperwork were observed to stem from lack of acceptance and appreciation of the NCEA itself. Newer approaches to curriculum and assessment, of which the NCEA is one example, do require teachers to write more, and some teachers may need more professional development in this area.

A further point in relation to paperwork is the possibility that some schools could be asking teachers to complete more paperwork than is centrally required, in the interests of developing good practice at the school level. Teachers need to be clear about what recorded information is required by central authorities, and what (and why) extra records may be asked for by school level management. This also entails that the central requirements for school documentation be clearly communicated to schools.

Reduction in the amount of paperwork could be achieved by employing clerical assistants, more and improved use of ICT, or reducing the requirements for documentation.

#### ***Area 6: Recognising and encouraging effective teaching***

Principals, managers and teachers identified capacity to attract effective teaching staff as a major factor in improving a school's effectiveness and alleviating workload. Yet this is not reflected in present career structures which do little to encourage individual teachers to strive for excellence. It would seem reasonable to expect that, in a system that did recognise and encourage effective teachers, the number of such teachers would be greater than in a system that failed to do this. One reading of the workload findings of this study suggests that there is little for teachers to strive for in the career stakes. The more senior the position, it seems, the higher the number of hours to be worked, with relatively few compensating factors!

In seeking ways of making the workload of individual teachers more manageable and the work more satisfying, policy makers may need to address the identified workload issues as they relate to teachers' career paths and recognition. It is likely that workload of teachers and middle managers in secondary schools will only be improved when education policies and practices reflect the relevant authorities' preparedness to understand, support, recognise and value the efforts of good practitioners.

#### **Areas for improvement at the school level**

##### ***Area 7: Deployment of teachers' time***

In objective terms of hours spent working, most teachers do not work more hours than other comparable professionals. (See PwC, 2001, p. 9). But the hours worked by teachers and managers in New Zealand secondary schools are sufficiently high to warrant further investigation into ways to reduce these hours.

Also, teachers' work differs in important respects from the work of most other professions in that secondary teachers need to be ready to 'perform' up front, about five times (a total of just under four hours, if class periods are fifty minutes) almost every day - with scheduled non contact time back stage for preparation strictly limited.

If it were possible to think of teachers as having a forty hour week, there would be approximately 20 hours 'up front' teaching and twenty hours for other work – preparation, marking etc - to support work in the classroom. Work performed outside of actual face to face classroom teaching duties was reported by teachers and managers to take up almost (in some individual cases more than) fifty per cent of actual workload. Yet, this work is all but invisible in school timetables and schedules that typically describe the work of the school between 9 a.m. and 3 to 3.30 p.m. Scheduled non-contact time often disappears like precious water into desert sand, and it consequently becomes necessary for many teachers to conduct what is arguably a key part of their professional work in time that is often, somewhat misleadingly, referred to as their 'own' time.

#### *'Non contact' time*

Teachers and managers appreciated increases in the amount of scheduled non-contact time that resulted from recent Collective Agreements (MOE, 2005). However, overwhelmingly, they continued to plead for more time to spend on professional tasks like planning and assessment. Given the increasing amount and complexity of assessment and curriculum requirements it would appear reasonable for teachers to seek time to perform the associated work, but this need not necessarily involve cutting face to face teaching hours any further. It may be achieved by reducing the amounts of time teachers spend on things they do not find professionally appropriate (such as clerical work) or by exploring other alternatives (see below).

There is also a need to probe the meaning of 'scheduled non-contact' time' in terms of what teachers do in that time. The term itself may be a misnomer. It is broad, somewhat negative, and provides no indication of what the time is actually for. (The PricewaterhouseCoopers [PwC 2001] study also noted this factor, suggesting 'Monitoring and Support time' as one alternative.)

Teachers' individual timetables provided for about five hours scheduled 'non contact time' per week, but teachers and managers were spending many hours in addition to this allotted 'non-contact' time on professional duties outside the classroom. The scheduled non-contact periods were, in many cases, not spent on planning or marking, for reasons suggested below.

There is an important distinction to be made between scheduled non-contact time (time that appears on teachers' timetables) and unscheduled non-contact time. As already noted, unscheduled non-contact time is sometimes referred to as teachers' 'own' time, which is a less than accurate expression, given that the scheduled school day finishes between 3 p.m. and 3.30 p.m.

A major shortcoming of scheduled non-contact time as it is presently distributed across school timetables is the way these non-contact periods are slotted in to the

school day, with teachers having, maybe, one non-contact period per day. Some teachers in the case study schools reported that this time was not generally useful for planning or marking, first because the individual blocks of time were too short, second because scheduled non-contact periods were open to interruptions of various kinds and third because other teachers with whom they might want to plan or discuss student's work were teaching at those times. Some teachers appeared to be using scheduled non-contact time to do some marking, but it was more commonly used for informal interactions with students and colleagues. Some teachers saw scheduled non-contact time as a necessary breathing space or 'spell' between exhausting classroom performances.

Many experienced teachers reported that they had learned to cope, over time, by regarding their working day as running from something like 8 a.m. to 5.30 or 6.00 p.m. at school, and they endeavoured to fit all their work into that space, rarely taking work home. Others, also with many years experience, had got into a routine of taking work home, which they found hard to break.

#### *Creating more appropriate blocks of non-contact time in the school day*

The study indicates the importance of finding ways to allow teachers to make effective use of non-contact time to support their core work of teaching. Recommendations from previous investigations of how blocks of time might be created as part of the working school day tended to be unsatisfactory, but they did suggest some possible directions. One study (New Zealand MOE 2001) identified schools in New Zealand that were employing some innovative strategies to re-organise school time. These strategies included scheduling the first period of one day per week for teachers to work on NCEA related activities and professional development. This entailed a later start for students, and required the permission of the School Board of Trustees. Although the time thus created was relatively short, this strategy had the advantage of allowing teachers to work collaboratively when they were 'fresh', as opposed to meeting when they were tired at the end of a day's teaching. Variations of this strategy that are not uncommon in schools include timetabling arrangements that allow groups of teachers in one subject area, or who are engaged in a common project, to be timetabled 'off' at the same time. Timetabling non-contact periods as 'doubles' can also be helpful,

While such practices as these have the advantage of encouraging collaborative work among teachers, they do not provide any extra time for individual work. However, they do suggest a potentially useful avenue for improvement, which is for timetablers to schedule non-contact periods in more creative ways that recognise how the time might best be used, support collaboration, and allow for longer blocks of time in response to teachers' needs. It needs to be noted, of course, that such practices may not suit everyone's ways of working. Broad consultation at the school level would be necessary before attempting to introduce them.

The PricewaterhouseCoopers researchers (tentatively) suggested making the school day longer while maintaining the same class-contact hours for teachers. This innovation would create more timetabling flexibility. If significant numbers of

schools chose to pursue this option, which would also maximise the availability of school facilities, a more flexible holiday schedule might also be considered.

*Creating more non-contact time by forming larger groups of students engaged in specific activities*

The PwC study also considered examples of schools that were allowing teachers to work with larger groups of students, thus freeing up teacher time for activities such as planning and preparation. The activities considered suitable for larger groups included some Physical Education classes and periods where students were engaged in computer assisted learning. Fieldworkers in the PwC study observed one school in which up to 100 students were able to learn in five ICT 'suites' supervised by senior teachers. This released a substantial amount of non-contact time and was supported by teachers in the school. Another possibility would be to have larger groups of students, supervised by fewer teachers, involved in audio-visual activities such as on-line video presentations and conferencing.

This section of the PwC study is quoted here as an example only, to aid possible future exploration of ways in which secondary teachers' duties might be rearranged by grouping students differently from the traditional thirty or so periods a week classroom model. The example should certainly not be interpreted as a suggestion to increase student-teacher ratios across the board.

No schools in the present study were considering changes like those shown in the example. However, many criticisms of traditional ways of grouping secondary school students, sometimes referred to as the 'chicken coop' or 'factory' model, are to be found in the research literature. There is sufficient reason to hypothesise that, if an alternative could be found, teachers working lives, as well as student learning outcomes would improve.

*Creating more time by employing more staff: teachers*

The most obvious way of providing more non-contact time for teachers would be to employ more teachers. Consideration of how these teachers would work, however, would need to precede such a step. For example, would they be deployed to teach classes of existing size (thereby allowing other teachers to have more non-contact time) or to reduce the numbers of students in classes, thereby cutting down on the amount of marking to be done. ?

The cost implications of this option are also worth noting. The PwC researchers made the observation that the recruitment of an additional 3000 teachers in the UK would create only around ten minutes additional non-contact time for each teacher. In New Zealand there are approximately 14 000 FTTE secondary teachers. (This figure excludes principals and others who have significant amounts of non contact time.) Creating one extra hour of non contact time for every teacher would, therefore, mean 14 000 hours per week. Assuming that 19 hours is one full time teacher (in terms of available contact time) then that is (rounded up) 740 additional staffing, a 4.9 increase. At current rates, that would be costed by the MOE at \$54.4.M per year on a secondary staffing budget of over \$1 B. Adding staffing for an additional one hour per week for holders of units would add about 7000 hours per week. Adding staffing

for one additional hour per unit each week would require about 21 000 hours (1110 FTTE).

To put this in context, the Government in 2000 agreed to 1850 FTTE extra staffing, which is being implemented over five years. There are currently about 12 000 additional teacher in secondary schools above roll growth changes through this phasing.

An additional factor is that roll decline from 2006 onwards could provide extra time for teachers without increasing teachers numbers in secondary schools, simply by holding them at current levels and allowing the teacher: student ratios to naturally improve.

Survey and case study respondents, especially principals, said that the capacity to attract *quality* teaching staff was a significant factor that influenced their workload and that of middle managers and the effectiveness of the core work of the school. Teacher quality was seen as important for teacher workload and satisfaction with workload across the school. This is unsurprising: working with competent colleagues is satisfying and stimulating, and the reverse applies.

*Creating more non-contact time by employing more staff: non-teaching specialist and pastoral staff*

A significant proportion of teachers' time, and an even more significant proportion of managers' time was taken up by pastoral duties, counselling students, setting up pastoral care programs, and generally managing student behaviour and problems that often arose from social and socio-economic problems outside the school. Most teachers are not trained for these duties. Employing more non-teaching specialist staff to perform them would, in all likelihood, provide a better service for students. This could help to reduce the stress reported by teachers as resulting from poor student behaviour in the classroom. It would also free up the time of managers to provide more time for professional duties connected with their core work.

*Creating more non-contact time by employing more staff: non-teaching clerical, administrative and support staff*

At present, teachers appear to be absorbing administrative tasks at no extra cost to the employer. However, any possible advantages of this situation are now being outweighed by its effects on teacher workload. Between 12 to 18 per cent of the time of senior managers, middle managers and teachers was reported as being spent on clerical and administrative activities. It makes little sense, in terms of efficiency and or economy for teachers to perform tasks that can be performed as well or better by non-teaching staff. This matter has recently been addressed in the UK, following the findings of the PwC study (2001) and from those of the School Teachers' Review Body (2000,2002), as part of 'modernizing' and 'remodelling' initiatives. Under new work agreements teachers can no longer be asked to perform over twenty specified administrative tasks such as collecting money and following up student absences. Results from the 'Pathfinder' project (DfES, 2002) suggest that this is helping teachers to become more focused on teaching and is improving morale. It may also be contributing to a reduction in the number of hours worked.

On its own, employing non-teaching staff is not a 'magic bullet' that would provide teachers and managers with more time to spend on professional activities. Careful consideration would need to be given to how these people would work in schools and the duties they would be asked to perform. The roles of teachers in relation to non-teaching staff members would also need to be addressed. Little would be gained, for example, if the time spent by teachers in training and supervising non-teaching staff were equal to or greater than the time they now spend doing the work themselves.

In the UK, Classroom Teacher Assistants are currently employed who actually teach some groups of students, to allow teachers more time for planning and preparation. This is proving to be contentious, with most teachers and managers being resolutely opposed to these people teaching classes of students. Currently, New Zealand legislation prevents schools from employing a unregistered teacher on a permanent basis. Only trained teachers can be registered. The current settings reflect a policy of students only being taught by trained teachers.

Again, much thought would need to be given to the role played by these staff, the actual work they would do, their training and their professional relationships with teachers. It will be useful to follow developments in the UK in relation to this and other matters.

#### ***Area 8: Student behaviour management***

There is no doubt from this study that managing student behaviour is a major reason why teachers perceive their work as arduous. Teachers vary considerably in their capacities in this area. Problems of managing workload and finding satisfaction in the work are closely associated with problems of managing classes of difficult students. Some research (Scott, Stone and Dinham, 2001) suggests that this problem may be being exacerbated in schools in developed countries that are experiencing socio-economic changes that take a toll on traditional family life and values. Certainly, social problems sometimes flow over into schools. This may help to explain why principals listed increased capacity to employ quality teachers high on the list of possible suggestions for alleviating workload problems.

One principal's approach to the workload problem over recent years had been to seek new staff who could cope with the problems. 'That's what I have been trying to do - to get the right staff in the school.' It appeared that this strategy was preferred above one of increasing the capacity of staff members who had difficulty managing student behaviour, through professional development.

The employment of more specialist pastoral staff has already been considered as a possible factor that would alleviate this problem as it affects teachers' workload. Teachers and managers surveyed suggested smaller classes, but it is interesting that, for both groups, the employment of additional staff and increased time for planning took precedence over this suggested option.

Data from the fieldwork and case studies indicated that sound whole-school policies and strategies to manage student behaviour were effective in easing demands on

teachers that resulted from student misbehaviour. Implementing these was however, seen to be very demanding on the time and work of managers such as Deans and Tutors.

Strong professional community, trusting and supportive leadership and the availability of appropriate professional development were all factors that were reported as helping teachers in this area.

#### ***Area 9: working environment and access to resources in schools***

Survey and fieldwork data gave rise to a strong impression that teachers and managers perceived their work to be influenced more by people – colleagues and students - than the physical elements in their work environment. This may suggest that policy aimed at improving workload should be directed more towards initiatives like attracting and retaining competent teachers than improving the physical conditions of teachers' work. Yet it remains the case that most teachers do not have workspaces and facilities that are even roughly equivalent to those that are routinely expected by most other professionals who can be compared with teachers.

Teachers' physical working conditions in schools across the world have been well documented and discussed in the literature. The problem is well recognised and understood, so no useful purpose will be served by expanding on it here. Nonetheless it is reasonable to suggest that workload problems of teachers and managers would be alleviated if their physical conditions of work were improved. The fact that most teachers and managers prefer to work at home, or outside school hours when few people are in the building and using scarce facilities, reinforces this view.

Similarly, managers or teachers did not identify lack of availability of resources as an issue of major concern, possibly because the time to use resources was so limited. However this did rate as a moderate 'stressor'. As previously mentioned, teachers and managers who were implementing the NCEA expressed a strong concern that more centrally developed resources should be made available electronically. For Kura teachers it is important to provide resources appropriately translated into Maori, so that, as found in one case study school, they do not have to spend large amounts of time translating materials themselves. Greater emphasis may need also to be placed on preparing off-the-shelf teaching resources and materials for teachers of adolescents whose reading age is below average.

#### ***Area 10: building a professional culture in schools, professional development, professional community and leadership***

Links were found between perceived workload manageability and quality of professional development, professional community and collaboration, and quality of leadership. In schools visited during the fieldwork phase of the study, teachers' perceptions of workload appeared to be more positive when they were working collaboratively in accordance with a shared vision under strong leadership.

Research is unequivocal that schools are most effective when staff have shared goals and values, strive to achieve strong professional community and ensure access to on

going professional learning. This study also found that a clear set of guiding values were significant for manageability of teacher workload.

Building such positive school cultures depends to a large extent on strong and visionary leadership. New Zealand schools and the MOE may be interested in current efforts, on the part of the Victorian (Australian) Department of Education, to encourage schools to build healthy and accountable professional communities in school through an initiative, still at the piloting stage, that invites schools to become accredited as schools with strong performance and development cultures.

### ***Area 11: The work of Heads of Department***

Middle managers were more negative than senior managers or teachers about the manageability of their workload. Many were Heads of Faculty or Heads of Department. In most of the schools visited in the fieldwork phase of the project, subject departments were the main units for professional community, collaborative planning, moderation, and professional learning among teachers. This arrangement appeared to be working well, although some researchers (Timperley and Robinson, 2000) argue that a cross-school model of organisation, where teachers collaborate in cross faculty groups around projects, or implementation of whole school initiatives, is more effective and saving of workload, in that it avoids duplication of effort and allows more efficient sharing of expertise.

Whatever the chosen means of organising teachers and their work in schools, most middle managers, especially HODs were observed to play a leadership role. Many teachers interviewed during the fieldwork phase of the project appeared to rely heavily on the work and advice of their Head of Department. Principals too valued HODs' work in leading and, in some cases, mentoring and helping to monitor the performance of other teachers. Principals in these schools regretted that Heads of Department had insufficient time and resources in which to perform their duties, but they were at a loss to know how to remedy the situation within the financial constraints of their school budgets. Principals, managers and teachers all recognised that the demands of the NCEA had impacted greatly on the work of HODs.

The Heads of Department interviewed in the fieldwork phase of the project said that they enjoyed aspects of their work in which they were able to help and lead other teachers. However, they said that because of lack of time and the more pressing nature of other activities such as resource management, and NCEA accountability requirements, they felt they were unable to lead others as well as they believed themselves capable, given their personal knowledge, experience and expertise. They felt particularly frustrated that the large amounts of paperwork they had to deal with that were connected with the NCEA and other accountability requirements took them away from a leadership role in teaching and learning.

Heads of Department are a valuable resource whose time and energies should be nurtured. At the very least, the employment of more clerical and administrative staff would ease their workload in the areas they currently most resent, such as excess paperwork. Most, but not all HODs appeared to have satisfactory workspaces and access to facilities like telephones and computers. Such conditions are essential if they are to perform their duties effectively.



Present trends (cf ERO Reports) suggest that educational authorities will continue to ask schools to improve and to be accountable for improving student learning outcomes. This growing focus on successful student learning may well mean that middle managers, especially HODs will need to spend more time helping other teachers to improve their practice. (It is now beyond doubt that there are direct and powerful links between students' learning and the quality of teaching they receive).

It is also likely that educational leadership will need to become more distributed in schools, and that managers will need to assume increased responsibility for leading others in the initiation and implementation of change. The researchers' discussions with competent managers and aspiring managers in schools during the fieldwork phase of this project suggested that these people, as professional workers, would welcome these challenges. But they will not be able to undertake the necessary work unless and until conditions in schools permit them to do so.

### *Area 12: Use of ICT in schools*

Data collected in relation to principals', managers', and teachers' use of ICT in schools showed only moderate levels of enthusiasm and confidence in these peoples' beliefs about the capacity of ICT to alleviate workload and improve the quality of teaching and learning. This may reflect inadequate training in the use of ICT, or a variety of other factors such as lack of access to computers or lack of suitable network development and maintenance.

In interviews during the fieldwork phase of the project, people who said that they were confident and skilled in the use of ICT also expressed more confidence in their ability to manage their time and workload efficiently.

Principals, teachers and managers showed only moderate enthusiasm for using ICT in their daily work and interactions. The reasons for this need further investigation.

This issue should continue to be addressed, especially through professional development and providing resources and support to schools. Building strong and supportive professional cultures in schools and trust between individual members of staff is also likely to improve the uptake of ICT, as people feel that they can confidently request the assistance of colleagues, share learning experiences and contribute, through school networks to a store of shared information.

A 'critical mass' in terms of ICT usage needs to be developed among staff in a school before all will feel the need to use it.

Research clearly shows that effective use of ICT has the capacity to improve workload for teachers, and to make their work more effective. In the future, it is likely that new technologies will change the face of the classroom, as we know it, so it is essential that teachers learn how to make optimal use of these new technologies and become more aware of their capacities and potential.

## **Areas for improvement at the level of the individual teacher**

The above discussion shows that for actual workload and perceptions of manageability of workload to improve for individual teachers, support will need to be provided at both system and school levels. Schools and systems need to strive for an educational culture in which individual teachers and managers can work co-operatively; they need to provide the conditions that will help staff to manage change, and create working conditions in which people feel secure and supported in performing their core work free of extraneous demands and impositions on their scarce time.

### ***Area 13: Variation in individuals' capacity to manage workload effectively***

Teachers and managers, as individuals, naturally vary in their capacity to work effectively and efficiently. Some individual teachers, for example were able to display very high levels of organisational skills. Some teachers showed themselves to be exceptionally intellectually able, knowledgeable in their subject areas and more in command of curriculum and assessment issues than some other teachers. People who appeared confident and competent tended to perceive their workload in more positive terms than colleagues whose personal capacities appeared to be less well developed.

The variation in teachers' capacities to manage unacceptable student behaviour has been noted above. Teachers, managers and principals made reference to the distress suffered by individual teachers whose classes appeared to be out of control. The number of these people is unknown, but anecdotally, they are present in most schools. Many teachers find classroom behaviour management the most stressful aspect of their work.

Reference was also made to the additional work and frustration caused by colleagues who were less than competent in this area. As one principal said:

Weaker staff has created a greater workload for our managers – when you have weak staff they are easily exploited by the kids – and our kids are adept at finding the weaknesses in staff – and that creates its own workload and tensions for those who are affected and also for those who are trying to support them, and in terms of morale as well.

Another area in which individual teacher capacity was seen to vary was curriculum and assessment. This was particularly apparent in NCEA implementation. Teachers we spoke with responded to the NCEA in different ways. Some found the changes in curriculum and assessment difficult to adapt to, while others moved smoothly into the new expectations, partly because they had already been making similar changes over recent years.

Some teachers and managers felt that their own work in this area was being impeded by the failure of other teachers to grasp the curriculum and assessment principles of the NCEA. Managers found these teachers more difficult to support and teachers and managers were frustrated when engaging with them in collegial activities, especially moderation.

Teachers also undoubtedly differed in their capacity to make teaching an organised and manageable job. Some teachers in the fieldwork schools talked about how they used holiday time to do most of their planning for the next term. This enabled them to be less stressed during term time. Others preferred to arrange their time differently, using Sundays (but rarely Saturdays) to plan for the coming week. For others still, it was difficult to set limits to the work. Whatever preference, it was clear that most teachers did not want others to tell them how to organise and manage their work – and this helps to identify a dilemma for policy makers seeking effective approaches to workload. The privacy of practice in teaching is well documented. Most teachers learn to cope with the demands of teaching alone, and in their own way, from the first year of teaching. As this becomes a habit and an expectation, it unfortunately cuts many teachers off from feedback and opportunities to receive good advice from effective teachers about how to manage their work more efficiently.

Teachers and managers need continuing assistance and professional development to help them ensure that all aspects of their work are being done effectively and efficiently. This applies in particular to those aspects of work that are performed in non-contact time, such as marking and recording students' work and planning lessons. Teachers and managers also need ready access to electronic resources that will support this work.

These issues underscore the need to ensure that suitable people are recruited to the profession, that teacher education programs are of high calibre and that staff are supported, especially by appropriate professional development, throughout their careers.

#### ***Area 15: Recognising what motivates teachers***

The research findings showed the main 'drivers' of teachers work to be their own motivation and commitment to achieving the best results for their students. Respondents did not take kindly to the idea of their work being 'managed' by external agencies or by people who were senior to them in the school hierarchy. Principals and senior managers were in sympathy with this view.

High levels of commitment on the part of individual teachers and middle managers showed that their motivation and inclinations were already in alignment with the core purposes of schools. There should thus be no need to compel teachers into complying with initiatives that are intended to improve teaching and learning. If initiatives are seen by people in schools to be useful for the core purposes of education, and if the necessary leadership, support, respect for the complexities of change processes and professional development are in place, the work will be carried out by teachers and managers with interest and enthusiasm.

The issue of how to motivate teachers is thus largely a matter of providing support and building capacity to sustain the existing levels of motivation that spring from the work itself.

### ***Area 16: Recognising the effects of unrealistic expectations and burnout***

Unrealistic expectations and accompanying burnout are likely to be part of the reason why some teachers perceived their workload to be unmanageable. These often seemed to arise from high levels of personal commitment, anxiety to help students achieve their potential, and the blurring of distinctions between duty and personal, deeply felt determination to do 'whatever it takes' for students.

This is a very personal issue that individuals may wish deal with privately. Yet the relatively high percentage of respondents who reported health problems related to workload suggests that schools and systems, as well as individuals need to be aware of the danger of burnout, which often appears to be the result of unrealistic expectations, and be prepared to take steps, including the provision of personal development programs, to prevent it.

As with the issue of motivation, attending to issues of unrealistic expectations and burnout requires that attention be paid to supporting individual teachers by providing suitable conditions of work and building their capacities to perform well.

### **Conclusions**

This study differed from some previous studies of teacher and middle managers' work in schools in that it sought to identify workload problems not only in terms of actual hours worked and the kind of work performed, but also in terms of how manageable people perceived their work to be, how satisfied they were with their work and how satisfied they were with the balance between work and home life. An important issue to investigate was the effect of workload on the capacity of teachers to perform their core work of teaching.

The research identified moderate to severe workload problems among teachers and managers in New Zealand secondary schools. Many managers and teachers who participated in the project reported dissatisfaction with their workload and its manageability, and their work- life balance.

Middle managers were clearly the group most affected by workload, although, interestingly, their actual hours of work were less than those of senior managers. The research suggested that the workload concerns of middle managers, particularly Heads of Department were largely related to their responsibilities in the areas of assessment, curriculum and performance review. These responsibilities were seen to be appropriate for this level of management and middle managers accepted them. The difficulties experienced related less to the nature of the duties than to lack of time and support to perform them.

The actual average number of hours worked by teachers and middle managers in New Zealand secondary schools was high, but comparable with hours worked by teachers in other countries and by people in comparable professions. (PwC 2001). Hours of work did not appear to have increased in recent years. (PPA, 1995). However, the number of actual hours worked is still sufficiently high to warrant further investigation into how those hours might be reduced.

The study found that the main factors related to perceived manageability of workload were to be found in the set of potential stressors identified in the questionnaire. This suggests that the essence of the workload problem relates more to stress than to the number of actual hours worked. It would appear that teachers are less concerned about how many hours they work than they are about managing to do a good job in the time available. The identified sources of stress need to be further investigated and addressed.

Managers and teachers were observed to be strongly motivated and committed to helping students achieve their academic and personal potential. In order to sustain these high levels of motivation by reducing overload and stress we concluded that a range of support measures should be developed, which might include such things as:

- Building supportive and accountable professional cultures in schools
- Providing managers and teachers with more time for collaborative planning and individual work outside the classroom
- Improving professional development to increase efficiency as well as effectiveness, especially in areas such as planning and marking students' work
- Improving policies and strategies for managing student behaviour , including the employment of specialist staff
- Improving and increasing the use of ICT
- Transferring clerical and administrative work to non-teaching support staff
- Making more resources available through electronic means, especially to support the NCEA
- Improving the quality of the work environment

The high percentages of school personnel who reported that workload was affecting the quality of their teaching were of serious concern. These figures related strongly to the underlying assumption of the study that overloaded teachers would be incapable of effectively carrying out their core work of teaching students. They reinforce the conclusion that, if negative effects on the educational achievement of secondary students in New Zealand schools are to be avoided, the issues of teacher and manager workload identified in this Report will need to be addressed urgently.

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