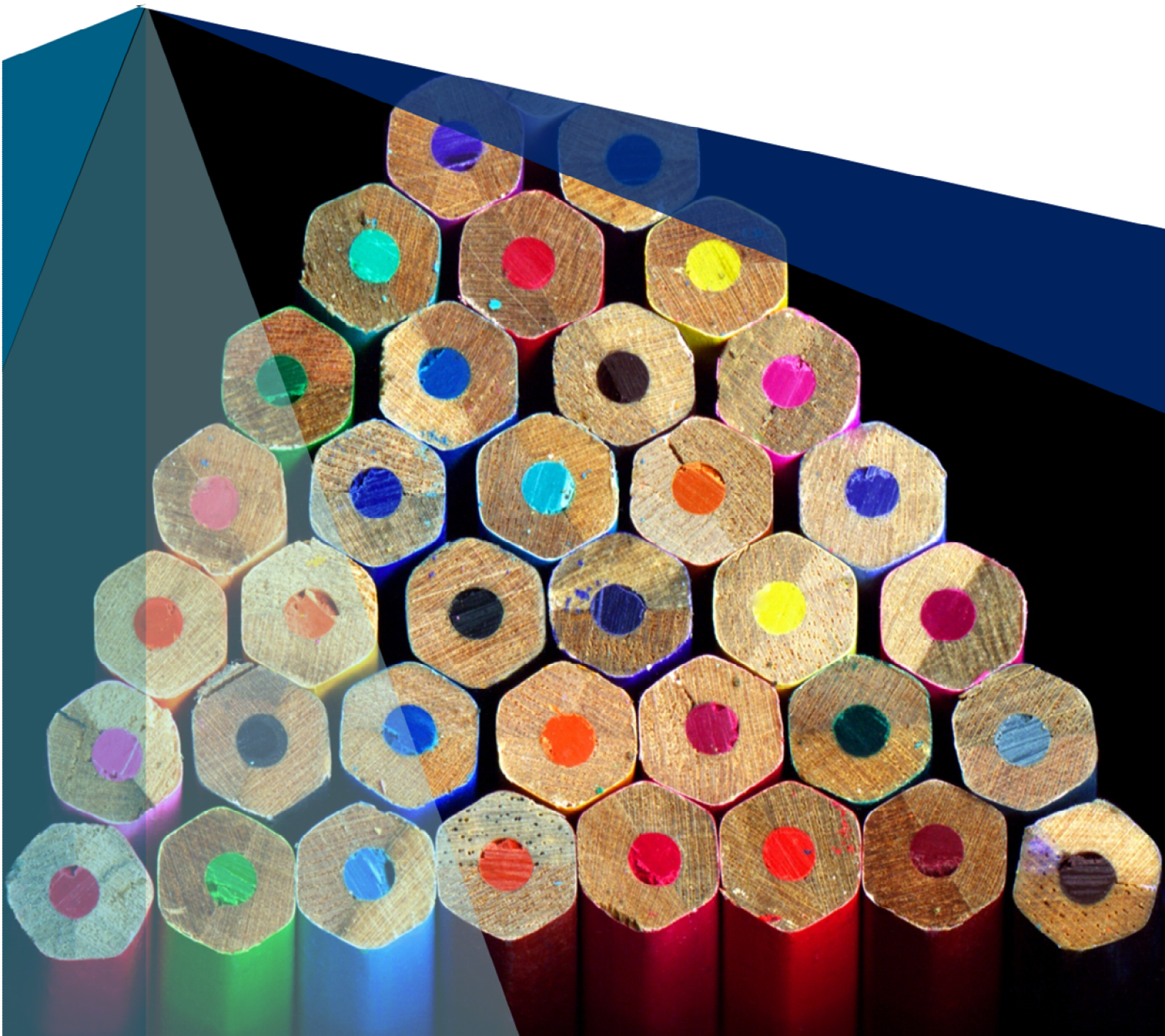


INTERNATIONAL STUDY INTO PAY AND NON-PAY CONDITIONS IN SCHOOLS

SEPTEMBER 2013



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INTRODUCTION

REMIT OF THE OME AND STRB

The Office of Manpower Economics (OME) provides secretariat support for all the Independent Pay Review Bodies, including the School Teachers' Review Body (STRB).

In supporting these bodies, one of the OME's key functions is to provide high quality research-based technical advice drawing on economic, pay, labour market, statistical and other technical data.

The STRB has received a remit¹ from the Department for Education to investigate:

- School leadership pay: how to provide a simple and flexible framework to ensure pay is appropriate to the challenge of the post and contribution to the school or schools
- Teachers' and leaders' non-pay conditions: how current detailed provisions could be simplified. How to ensure they are suited to a high status profession, give primacy to teaching and learning, do not place unnecessary burden on teachers and provide schools with flexibility

In providing recommendations on school leadership pay and teachers' and leaders' non-pay conditions the STRB would like to consider practice in other high performing education systems around the world.

This report provides the outcomes of a survey of international practice of school leadership pay and school non-pay conditions to inform the OME's recommendations to the STRB.

All information on schools included in this report, and information around school structure in different countries, is referring to publicly-funded establishments.

SELECTED COUNTRIES OVERVIEW

Mercer identified possible participant countries based on a review of OECD PISA rankings (student performance in reading, mathematics and science, see next page for details). The chosen countries therefore have high performance education systems, together with good availability of public data:

EUROPE



Denmark



Ireland



Finland



Norway



Germany



Sweden

NORTH AMERICA



Canada



USA

ASIA PACIFIC



Australia



Singapore



New Zealand



Hong Kong

EDUCATION SECTOR – KEY FACTS

Country	Overall OECD PISA score ¹			PISA Ranking	Average annual spend per student ² (USD)	Average Classroom Teacher Salary ³ (USD, 2010)
	Reading	Mathematics	Science			
Denmark	495	503	499	24	\$10,429	\$43,393 - \$50,253
Finland	536	541	554	3	\$8,068	\$30,190 - \$41,291
Germany	497	513	520	20	\$7,859	\$48,757 - \$64,901
Ireland	496	487	508	21	\$8,915	\$32,601 - \$60,758
Norway	503	498	500	12	\$12,070	\$32,629 - \$40,405
Sweden	497	494	495	19	\$9,524	\$29,091 - \$38,824
Canada	524	527	529	6	\$8,388	\$34,443 - \$54,978
USA	500	487	502	17	\$10,995	\$36,857 - \$53,698
Australia	515	514	527	9	\$7,814	\$34,257 - \$47,445
Hong Kong	533	555	549	4	n/a	n/a
New Zealand	521	519	532	7	\$6,496	\$27,923 - \$41,536
Singapore	526	562	542	5	n/a	n/a
UK	494	492	514	25	\$9,169	\$41,502 - \$73,734

¹ PISA is an international study that was launched by the OECD in 1997. It aims to evaluate education systems worldwide every three years by assessing 15-year-olds' competencies in the key subjects: reading, mathematics and science. To date over 70 countries and economies have participated in PISA. Latest report was published in 2010: <http://www.oecd.org/pisa/46643496.pdf>

² Data is an average of primary and secondary school salaries and sourced from the OECD Factbook 2011: Economic, Environmental and Social Statistics

³ Teacher salaries are given as a range between average starting salaries and salaries for teachers with over 15 years of experience. Sourced from Education: Key tables published by OECD, with the exception of the UK which was sourced from <http://www.education.gov.uk/get-into-teaching/salary/teaching-salary-scales> and represents an average of the minimum and maximum on the main pay scale and advanced skills teachers scale converted into US dollars. Salary figures are gross and countries could have significantly different fiscal arrangements that would affect net pay rates

METHODOLOGY AND DEFINITIONS

Data collection methods included personal interviews with experts in the target countries, internet desk research and a review of literature concerning school leadership. Information was gathered on two general topic areas; leadership pay and non-pay conditions, with key areas of interest under each shown below:

Leadership Pay

- Career paths for school leaders (i.e. head teachers, deputies and assistants) including any qualification/experience requirements
- Approach to, and factors used in, pay determination for different leadership roles in different types/sizes of schools
- How leadership pay arrangements relate to those for classroom teachers – transition from one to the other; salary levels relative to classroom teachers
- The *reward package* including progression arrangements (and links to appraisal), pensions, variable pay, wider benefits, etc.
- Governance arrangements (oversight of pay determination, performance management and pay progression)
- Wider regulatory accountability arrangements

Non-pay conditions

For classroom teachers, these include provisions relating to working time, protected time for planning, preparation and assessment, protection against covering for colleagues except in rare circumstances, protection against being requested to undertake a range of administrative tasks. For school leaders, provisions include a list of professional duties, including delegation arrangements, and dedicated time for carrying out headship duties:

- Provisions on non-pay conditions. In particular whether there are set limits on a) working hours b) tasks which are (and are not) appropriate for teachers c) any entitlement to time for professional development
- Protected time for certain activities, e.g. planning, assessment, training, etc.
- Provisions relating to covering for absent colleagues
- Annual leave entitlement
- Whether provisions are different for classroom teachers and school leaders
- The legal status of the provisions
- Any research on the impact of the provisions on the school workforce and/or schools' effectiveness
- Any recent history of change to such conditions

'SCHOOL LEADERS' AND 'CLASSROOM TEACHERS' DEFINED

This survey splits out the findings for classroom teachers and school leaders. To provide a comparison to positions commonly found in UK schools, a summary of each job is listed in the table below:

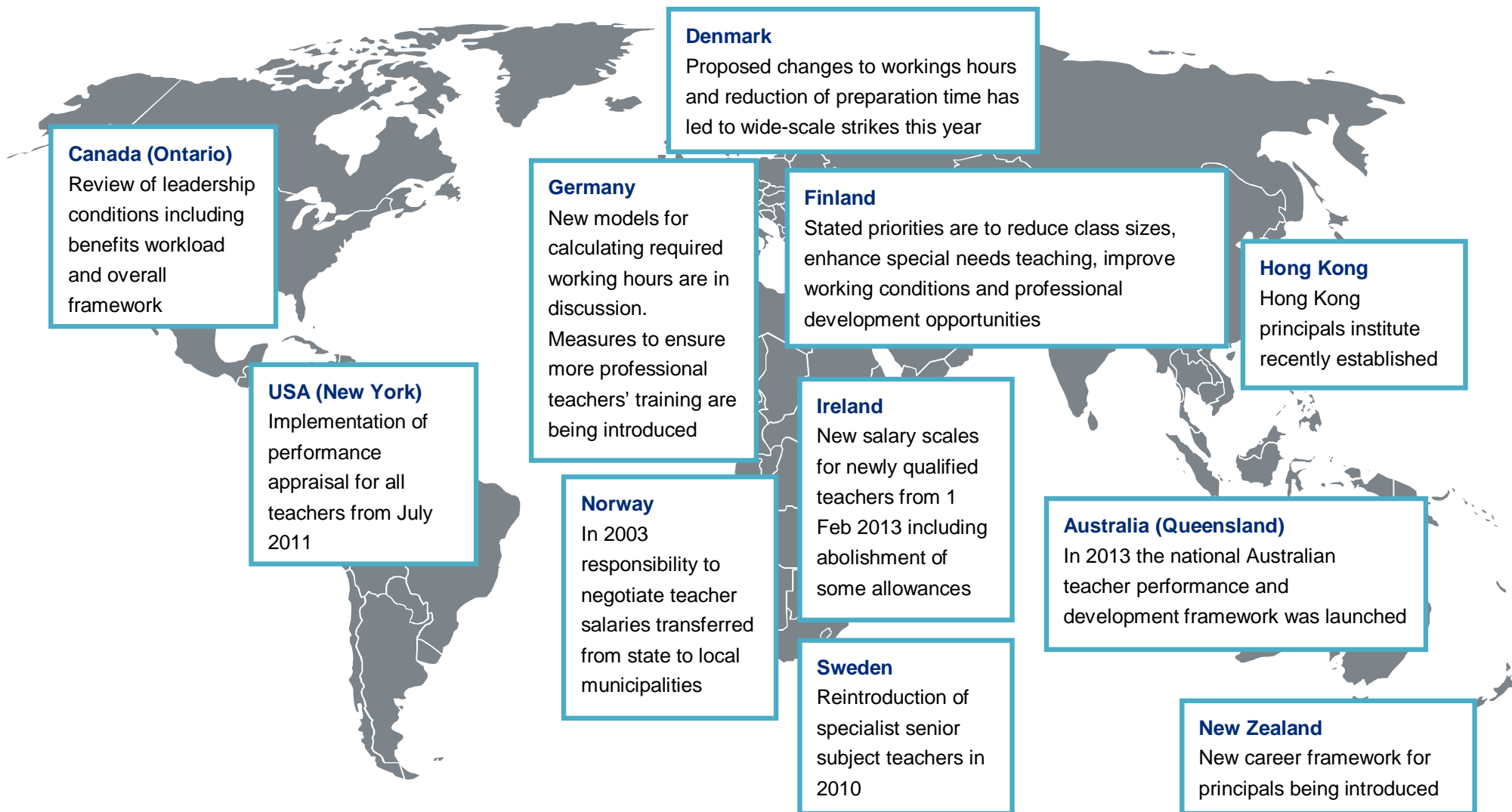
EXECUTIVE HEAD TEACHER	<p>The leader of more than one school, ultimately accountable for the schools' outcomes.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Provide overall strategic leadership and, with others, lead, develop and support the strategic direction, vision, values and priorities of the schools • Lead and manage teaching and learning throughout the schools • Lead, manage and develop the schools' workforce, including appraising and managing performance <p>In some cases, individual schools may additionally have a Head of School under an Executive Head, with the former accountable for his/her own school</p>
HEAD TEACHER	<p>The leader of a single school, ultimately accountable for the school's outcomes.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Provide overall strategic leadership and, with others, lead, develop and support the strategic direction, vision, values and priorities of the school • Lead and manage teaching and learning throughout the school • Lead, manage and develop the school workforce, including appraising and managing performance
HEAD TEACHER SUPPORTING ANOTHER SCHOOL(S)	<p>The leader of a single school, ultimately accountable for the school's outcomes. Additionally supports another school (or schools). Responsibilities include:</p> <ul style="list-style-type: none"> • Provide overall strategic leadership and, with others, lead, develop and support the strategic direction, vision, values and priorities of the school • Lead and manage teaching and learning throughout the school • Lead, manage and develop the school workforce, including appraising and managing performance
DEPUTY / ASSISTANT HEAD	<p>Plays a major leadership role under the overall direction of the head teacher in:</p> <ul style="list-style-type: none"> • Formulating the aims and objectives of the school • Establishing the policies through which they are to be achieved • Managing staff and resources to that end • Monitoring progress towards achievement of the aims and objectives <p>If the head teacher is absent from the school a deputy head teacher must undertake their professional duties to the extent required by the head teacher or the relevant body.</p> <p>Some roles come with teaching responsibilities:</p> <ul style="list-style-type: none"> • Plan and teach lessons and sequences of lessons to the classes they are assigned to teach within the context of the school's plans, curriculum and schemes of work

<p>CLASSROOM TEACHERS</p>	<p>Teaching staff responsible for the learning of a group of pupils. Duties normally include:</p> <ul style="list-style-type: none"> • Plan and teach lessons and sequences of lessons to the classes they are assigned to teach within the context of the school's plans, curriculum and schemes of work • Assess, monitor, record and report on the learning needs, progress and achievements of assigned pupils • Participate in arrangements for preparing pupils for external examinations • Whole school organisation, strategy and development • Contribute to the development, implementation and evaluation of the school's policies, practices and procedures in such a way as to support the school's values and vision • Work with others on curriculum and/or pupil development to secure co-ordinated outcomes • Promote the safety and well-being of pupils • Maintain good order and discipline among pupils • Direct and supervise support staff assigned to them and where appropriate, other teachers
<p>MIDDLE MANAGERS</p>	<p>Teaching staff (as above) with a significant formal management responsibility, e.g. for a subject department, or leading a year group, etc.</p>

SUMMARY OF FINDINGS

SUMMARY OF FINDINGS

Recent and proposed changes



Leadership pay

All countries with the exception of Sweden use incremental pay scales for teachers and school leaders. Sweden uses a system of individually negotiated pay with national minimum salary levels as stipulated in collective agreements.

The majority of the countries that use pay scales determine leadership pay on the type / size of school and seniority of the role. The least common factors that determine pay are the school budget size, used only in Denmark, and the individual's personal career path up to their appointment as a leader (only used in Singapore). There are a number of other factors applied in different combinations that are detailed in the table below.

Criteria to determine pay for school leadership positions:

Country	Type of school	Size of school	Budget	Qualification	Seniority	Length of service	Location	School performance	Career path / Individual Performance
	e.g. primary, secondary or special educational needs	Number of teachers and / pupils	Financial budget of school	Graduate / post-graduate or other qualification	Those in more senior positions are automatically paid more	Time spent teaching / working in schools	Different pay scales for different areas of the country	As rated by an official body	As measured in a performance appraisal
Denmark			✓		✓		✓		
Finland	✓	✓			✓				
Germany	✓	✓			✓	✓	*		
Ireland**	✓	✓			✓	✓	✓		
Norway	✓	✓			✓				
Canada (Ontario)***	✓			✓	✓				
USA (New York)	✓			✓	✓	✓		✓	
Australia	✓	✓			✓		✓		
Hong Kong	✓			✓	✓	✓			
New Zealand	✓	✓		✓	✓			✓	
Singapore				✓					✓

*Pay scales are determined at state level but it is not known if the differences in salary are due to cost of living or difficulty in recruiting teachers and leaders (such as is the case with Central London)

**Pay for new teachers in Ireland has changed. Detail in table relates to those teachers and leaders that qualified before 2011. Deputy principals and principals in Ireland receive extra pay when promoted to these positions. The amount is determined by type and size of school

***In Ontario, it is required that school leaders who earn over CAD100,000 have their pay disclosed via a public website. More detail can be found in the country section

Case study: Sweden's unique approach to setting leader pay

The Swedish system is based on a decentralised individualised pay scheme which replaced pay scales in 1995. Pay rates are negotiated at an individual level within central and local agreements. The aim of the new scheme was to stimulate improvement in effectiveness, quality and productivity of teachers and leaders. An additional aim was to improve the recruitment and retention of teachers.

Case study: Australia's (Queensland) technical evaluation of job sizes

Queensland uses Mercer's Job Evaluation Management System to evaluate roles in a school. This takes into account location, size and complexity of the school (e.g. remoteness, Indigenous population, behaviour, socio/economic factors, resourcing issues, curriculum, community relations, staff management). Aboriginal Community Schools are generally one level higher than other factors would indicate.

Allowances

Other published allowances that may be awarded to school leaders and teachers are detailed in the list below. This list does not include discretionary allowances that can be awarded by the governing body of a school or local education authority.

School Leaders and Teachers

- Responsibility allowance – sitting on the school board, holding evening classes (Ireland, New Zealand)
- Qualification allowance – for qualifications above the minimum required to be a teacher (Denmark; Ireland)
- School size allowance – extra pay for those working in larger schools (USA, New York)
- Location allowance – allowance for working in a remote area / area that is hard to recruit into (Finland; Ireland; Norway; Australia, Queensland; New Zealand)
- Career allowance – for those that have reached a particular career step (New Zealand)
- Native language allowance (Ireland; New Zealand)
- Travel allowance – for travel to and from work (Denmark; Australia, Queensland; New Zealand)
- Family allowance – extra allowances per child they parent (Germany)
- Non contractual working – e.g. summer schools (USA, New York)
- Allowance for roles that are difficult to fill (New Zealand)

Teachers only

- Responsibility allowance – special responsibilities such as supervision or middle management (Denmark, Finland, Germany, Ireland, Norway, Canada, USA, New York, Australia, Queensland, Hong Kong, New Zealand, Singapore)

Case study: Singapore's financial retention payments

Teachers in Singapore receive a annual payment on their behalf by the Ministry of Education into a retention fund. The fund is then paid to a teacher, provided they have continuous service, at various points in their career as a way of ensuring investment in the talent pool is maximised.

Performance management and performance-related pay

An established performance appraisal system for teachers and school leaders was evident in nine countries. Typically, guidelines for appraisals are established centrally and the process is led by the school leadership team and school board. In Denmark, Finland and Ireland there is no national requirement for performance appraisal, although practice at an individual school level may vary.

Directly linking performance-related pay for school leaders to the result of their individual performance appraisal rating is not as common as carrying out the appraisals for development purposes. Where it does exist practice varies greatly from driving progression through the pay scales (e.g. New Zealand) to an annual performance-related bonus paid out as a percentage of base salary (e.g. Singapore). In Finland, Ireland and Canada (Ontario) there is no option for performance related pay through either faster progression through pay scales or bonuses.

Shown below is a spectrum to illustrate the philosophical stance of each country in relation to performance-related pay:



Case study: Australia's financial incentives for long-term leader performance

Principals in Queensland are hired on fixed four-year contracts. Currently, 173 Principals are eligible to receive an annual bonus of AU\$20,000 subject to continually meeting performance criteria. This is paid annually and taxed – net AU\$10,000 – under the national Partnership Scheme. Progress against targets is published each year as part of the school's annual report. The future of the scheme is not entirely clear but likely to continue and The Education Department says it is "too early" to measure effectiveness and it does not apply to any other teachers.

Case study: Singapore's performance bonuses for teachers and leaders

Performance bonuses are paid annually based on the outcome of the teacher / leader's performance appraisal. This typically amounts to 10%-30% of annual base salary, with the amount varying depending on performance (from average to outstanding performers). Teachers can also be rewarded with a sum ranging from \$3,000 to \$10,000, depending on staff strength for outstanding team-based contributions to their school. The individual outstanding contribution award is at S\$1,000.

Governance

The majority of countries surveyed have centrally established but locally governed education systems. The only notable exceptions are Finland, Denmark, Hong Kong and New Zealand where processes have become more decentralised in recent years. In Denmark for example, local School Boards include parents, teachers, local community members and students. Singapore maintains its focus on building strong linkages to performance, awarding greater autonomy to schools which are regarded as high performing.

Typically, pay for teachers and leadership below principal level is decided by the principal and / or the school board. Principal pay is decided by the school board / local authority in most countries, however in some, where the management of pay is more rigid, it is decided at a centralised level.

Career paths

Case study: New Zealand's new career structure for Principals

In New Zealand, a new career structure for principals is being introduced. Principals that have served a minimum of three years, and have completed the First Time Principals Programme and participated in CDP are promoted to the 'Initial Principalship' level. After six years and meeting certain requirements, they can be promoted to the 'Experienced Principal' Level and after nine years to the 'Leading Principal' Level. An extra allowance on top of salary is paid at all levels.

Defined career paths to senior leader positions in a school were not common. Most countries require school leaders to hold a school teaching qualification (only exceptions were Denmark, Norway and Sweden). Some countries (Norway, Sweden, Canada, Hong Kong, US and Singapore) have specific leadership academies where selected high performing candidates are developed and coached to follow a school leadership career path. In Hong Kong teachers and leaders are encouraged to take part in secondments in the Education Bureau (Government Department) and likewise, employees of the Bureau are encouraged to spend some of their careers working in schools.

Case study: USA's (New York City) development and recognition programmes for high performers

The Lead Teacher Programme offers high performing teachers the opportunity to take on a leadership role either within their school or a new one. Lead Teachers spend 50% of their time in the classroom and the remaining 50% of their time providing professional development and support to teachers and it can be seen as a pathway to an assistant principal or principal position. They receive an allowance on top of their salary to account for the extra responsibility.

In the Executive Principal Programme, Principals are selected by the Chancellor and agree to a 3-year assignment to serve in high-needs schools. Those chosen to participate will receive a \$25,000 annual salary enhancement which is pensionable. At the conclusion of the 3-year assignment, the principal may seek to continue in his/her current assignment or accept a new one. Additional time as an Executive Principal may be offered in one-year terms renewable by mutual agreement. The principal may also opt to return to a regular assignment in the district (or borough for High Schools) in which s/he is assigned.

Non-pay conditions

Only Canada has a specific agreement that teachers will not have to perform administrative duties. All other countries do not have an agreement in place discussing what specific tasks teachers could or could not be expected to do. Finland abolished an agreement detailing specific tasks in 1991.

The majority of countries stipulated a number of hours / days a teacher should be expected to teach for (Denmark, Finland, Germany, Ireland, Norway, Sweden, Canada, USA, Australia and New Zealand - secondary teachers only). The range of teaching hours, where it is specified is at its lowest in Norway (741 hours) and at its highest in Ireland (915 hours). Other countries disclose total working hours which include both teaching and other activities (ranging from ~1,400 in Australia to 1,793 in Germany). Often teaching time is less in secondary schools. Typically, non-teaching time can be spent at the teachers' discretion or is decided by the local authority / school board (on planning, assessment, administration, etc.). However, in some countries there are a specified number of hours per type of activity, for example in Norway and Sweden there is mandatory time that must be spent on planning and management with the remaining non-teaching time spent as the teacher wishes.

Continuing Professional Development (CPD) was actively encouraged in all countries. Teachers in ten countries (Finland, Germany, Norway, Sweden, Canada, USA, Australia, Hong Kong, New Zealand, and Singapore) have a contractual entitlement for CPD which is most commonly set at five days per year.

Case study: Denmark's removal of nationally agreed preparation time

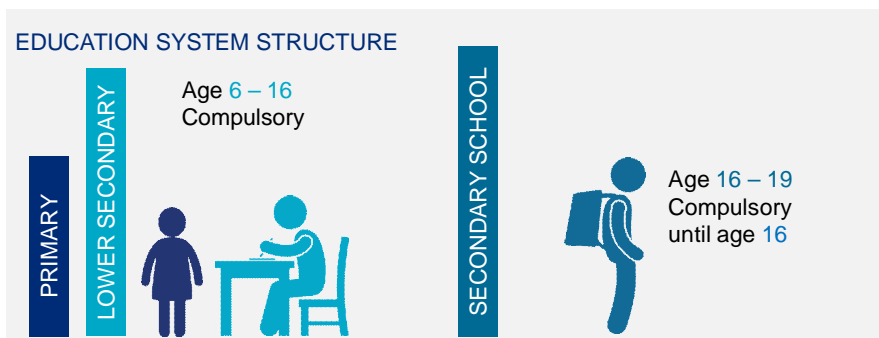
A breakdown of negotiations over the new collective agreement for teachers led to a 'lock out', meaning teachers did not teach from 2 to 25 April 2013. The breakdown was predominantly due to the change in collective agreements resulting in the individual municipality having full control of the teachers' working hours, and thus there no longer being national guaranteed time for preparation. Also at risk at the time of writing is the current option to reduce the weekly teaching time for teachers over 60 and the practice of local agreements between the teachers' union and the employers.

DETAILED FINDINGS

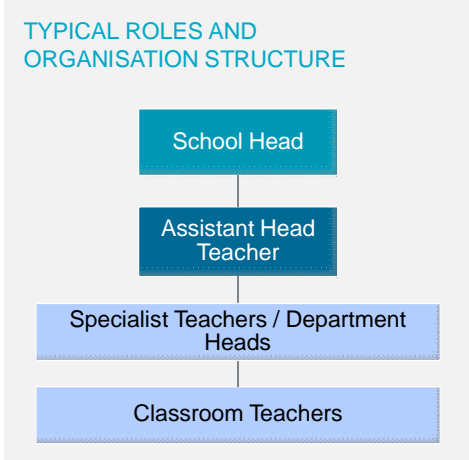
EUROPE



COUNTRY DETAIL



- RECENT / PROPOSED CHANGES**
- The government is currently proposing a 'full day school' which would see hours for which pupils and teachers are in school everyday increase
 - From 2012 schools were granted greater autonomy and responsibility to allow for education of children with special needs in mainstream schools
 - Increase of funding from 2014-2020 to provide more opportunities for professional development of teachers – a key priority is to raise the competence of teachers in public schools
 - Increased focus on career paths including a route into educational consultancy for 'beacon' teachers



? *Who sets education policy*

Compulsory education in Denmark is financed jointly by the state and municipalities. National legislation covers curriculum and staffing policies. National collective agreements define conditions of service. Teachers are employed by municipalities

? *Who are head teachers accountable to?*

The school head answers to school or institutional boards as well as the municipalities

CONTEXT

Primary and lower secondary education is compulsory in Denmark and is covered in one school for students typically aged from 6 to 16 (the Folkeskole) although compulsory schooling is bound by grades (1-9), not age. Teachers qualify after four years of training, including six months of practical training, from one of the 18 teacher training colleges that are located all over the country. Around 87% of all children attend Folkeskole. These schools are predominantly run by each of the 98 municipalities who can set their curriculum, targets and teacher pay and non-pay conditions within national guidelines. These are then implemented by School Principals and School Boards (made up of parents, teachers, community members and students). The one exception, with the purpose of ensuring more coherence in youth education, is that the government took over responsibility from the counties regarding the upper secondary schools and the higher preparatory examination courses (pre-university level of education). This report will look at the pay and employment conditions of teachers and leaders of the Folkeskoles in Denmark.

The topic of teacher pay and conditions is currently in the public eye as a breakdown of negotiations over the new collective agreement for teachers led to a 'lock out', meaning teachers did not teach from 2 to 25 April 2013. The breakdown was predominantly due to the change in collective agreements resulting in the individual municipality having full control of the teachers' working hours, and thus there no longer being national guaranteed time for preparation. Also at risk is the current option to reduce the weekly teaching time for teachers over 60 and the practice of local agreements between the teachers' union and the employers.

The employers' association, Local Government Denmark, will not compromise on their demand for a new working time agreement with no limits to teachers' working hours. At the time of writing this issue was still not resolved and thus the pay and non-pay conditions of teachers and school leaders in Denmark may be subject to major change in the coming years.

LEADERSHIP PAY

Overview of the structure of leadership and teacher pay

On 1 April 2000, a new salary system for teachers in the Folkeskole was introduced. The system consists of four parts: basic wage, function allowance, qualification allowance and result pay.

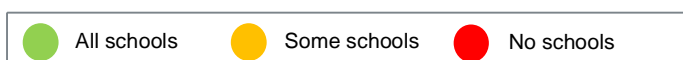
- **Basic Wage:** The basic wage covers the basic responsibilities and expectations to the position. Each salary step in the basic wage has five different pay rates depending on where in the country a teacher or school leader is employed.
- **Function Allowance:** The function allowance is given for work and responsibility areas linked to the individual position, these functions needs to be special functions beyond what is expected of the position. Functional allowance can include supervision functions, school board responsibilities and evening teaching (not exclusive list). The functional allowance is on top of the basic salary.
- **Qualification allowance:** Based on the individual teacher's qualifications and objective conditions. There is a centrally agreed qualification allowance based on experience. The qualification wage is agreed on at decentralised level (other than the allowance relating to experience).
- **Result Pay:** The result pay or bonus is for school principals and other leaders at schools. It is an optional part of the leader's salary package; it is decided by the school board if they want to offer a result contract to school leaders. The result pay is based on a so-called result contract between the school board and the leader. The contract should contain clearly defined qualitative and/or quantitative goals defined by the school board. Goals in the result contract needs to be clearly defined and be beyond what would be expected of the leader within the scope of the role and goals needs to be related to current school challenges.

Which salary step a teacher is placed on is determined by the teacher's education and number of years of experience. The salary scale is very objective in many respects, for example, a newly hired teacher with a teacher's education would be placed on step 33 and receive DKK 3,000 extra a year. After 4 years the teacher would move to step 37. The main difference between the pay for leaders and teachers is that the setup for leaders is based on negotiation between the leader and manager e.g. the principal and school board. The criteria when setting a school leader salary are more locally defined, but can include economic responsibility, level of educational and administrative responsibility and other elements which determine the weight and complexity of the role.

How does pay change?

An employee moves up a salary scale step once every four years, unless they receive a promotion. The tenure based salary scale adjustment occurs four times until the teacher reaches tenure of 12 years, thereafter the teacher remain at the same salary scale step. The base salary scales are adjusted annually based on centralized negotiations. For leaders there is a larger element of negotiation in the annual salary adjustment. Thereby the salary for leaders is more discretionary than for teachers.

Component of pay	Present?	Comments
Pension		The pension contribution is 17.3% base salary and of this 1/3 of the pension is the employee's own contribution
Travel allowance		In Denmark all employees get a tax reduction based on their distance to work, if longer than 12 km each way. Teachers receive an additional allowance if they have to travel to two teaching locations on the same day
Housing allowance		Not common, neither for teachers nor generally in the market
Extra responsibility allowances		There is guidance from the central government that service allowances should be paid for a number of tasks and responsibilities, for example, special education
Location allowance		Salary scales in Denmark differ depending on which of five areas of the country the teacher is employed in.
Other		All teachers receive life insurance



PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

There are no national requirements for teacher appraisals in Denmark. There is typically an annual or bi-annual employee development conversation with their manager, this does however not constitute an actual performance appraisal process. The teacher appraisal culture in Denmark is mainly based around self-appraisal. There is no link between this appraisal process and pay for teachers. Otherwise the performance of the teacher is mainly measured indirectly as a result of national student testing.

How is pay linked to performance?

Rewards for good performance are determined by the municipality, and leaders in secondary schools can receive a monetary award.

There is a possibility to establish a so-called result-contract with the leader at a school. Any such contract must contain concrete goals relating to the schools current challenges. All goals should be precise and transparent. The total bonus pay-out must not exceed 25% of base pay + permanent allowances. It is the school board that decides, after talks with the leader, the amount of bonus which should be paid out. It is encouraged that the institution uses result-contracts with other leaders in the school as well, but no official framework exists for this. It is however decided that the level of any result-contracts for other leaders should take into consideration their hierarchy on the organisation and should not exceed 25% of base salary +

permanent allowances. All result-contracts should be published on the institution's homepage making it available to the public. The board can also pay-out discretionary bonuses on the basis of extraordinary achievements.

CAREER PATHS

Criteria for promotion

Danish teachers work within a non-hierarchical collegiate organisation and there is no automatic promotion to a management function. Institutional managers are chosen on the basis of their qualifications and these school principals are responsible for distribution of work to school staff, curriculum, budget and decisions concerning students. There is also an increasing focus on school principals actively improving teaching standards and that teachers receive training to do so.

Teachers apply for headships on the basis of their merits and are recruited by the municipal council after being evaluated and recommended by the current school's advisory board comprising both teachers and parents. For principal positions it is not a requirement that they have teaching experience, but from review of current job advertisements it is the most typical that they would have this.

There is no compulsory pre-service training for principals, however there are some courses available such as The Lærer til Leder ('From teacher to leader') diploma programme for basic school teachers (VIA University College). New principals do, however, participate in an induction programme run by the local authority and the school which lasts 150 hours. Principals must also attend seminars and conferences relating to reforms.

Danish teachers who may want to have a leadership position can begin to understand the different components of becoming a school leader through a "taster" course offered by local school districts or municipalities. Participants take part in one or more modules of a Leadership Diploma of Education and must also conduct a project in their own school.

NON-PAY CONDITIONS – GENERAL

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	Leaders are expected to teach less on larger schools (or not at all) compared to small schools	The maximum number of weekly working hours for teachers is 37 summing up to 1680 hours yearly
Professional development	No typical practice or legal requirements	No legal requirements, this is decided and set at local school level
Planning and assessment	No typical practice or legal requirements	According to the new agreement from 2013, all hours are decided locally by the school leader

Management	No typical practice or legal requirements	-
Required to cover for colleagues	No typical practice or legal requirements	Typically substitute teachers are used in connection with sickness
Annual leave entitlement	Teachers have the same holidays as other local government employees, i.e. 6 weeks paid holidays per year. Teachers also have unofficial leave during school vacation time, this is not official vacation time, but periods with low activity for teachers	

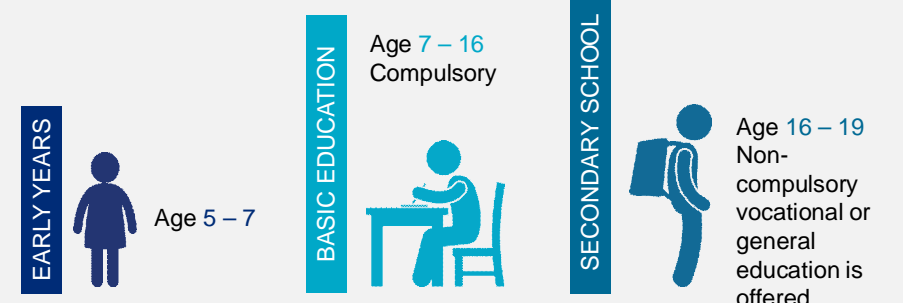
NON-PAY CONDITIONS – SPECIFIC TASKS

In Denmark, typically there is not set aside specific time for administrative tasks connected with teaching, nor is there any specific protection for doing such tasks. A teacher has a so-called “teaching factor”, which is a ratio of 1.23 for newly hired teachers and 1.14 for other teachers. The teacher would then receive 1.23 hours for every teaching hour they engage in. The additional 0.23 hours covers time used for all administrative tasks related to teaching, including parent-teacher conversations.



COUNTRY DETAIL

EDUCATION SYSTEM STRUCTURE



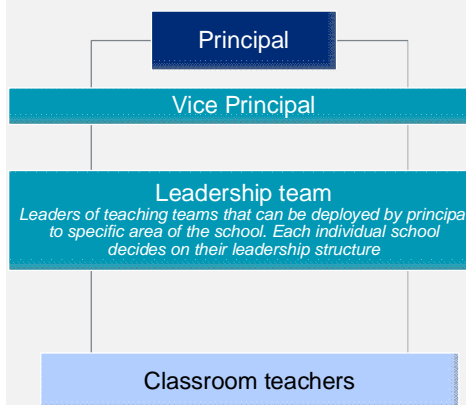
? Who sets education policy – central government or local authorities?

The education system is flexible and the administration of it is based on the principle of “Centralised steering – local implementation”. Municipalities are responsible for the provision of education and the implementation according to country-wide principals and policy. Schools and teachers enjoy large autonomy

RECENT / PROPOSED CHANGES

- In 2010 Finland started to re-design the school-leadership model to give greater autonomy to principals
- The government’s stated priorities going forward include reducing class sizes, enhancing remediation and special needs teaching, improving teachers’ working conditions, establishing new opportunities for professional development

TYPICAL ROLES AND ORGANISATION STRUCTURE



? Who are head teachers accountable to?

The local municipality, or the district principal

CONTEXT

Finland is known around the world for having a top-performing education system but that has come about after decades of ensuring education is high on the political agenda. For teachers, a Master’s degree is a requirement, and teacher education includes teaching practice. The teaching profession is very popular in Finland, and there are a high number of applicants for each teacher training place. There are two divisions of teachers - class teachers mainly work in grades 1–6 of comprehensive school (primary level), whereas subject teacher education is mainly for those teaching in grades 7–9 of comprehensive school (lower secondary level) and at upper secondary school. Teachers in Finland enjoy autonomy in the classroom and special needs education is integrated into regular education as far as possible. The role of school principals is not only as an educational leader but as a manager who is responsible for financing, personnel, and the results of their institutions.

Teacher pay in Finland is reasonably competitive but no more attractive than in many other European countries. Finland does have a very high retention rate for teachers, with about 90% of trained teachers remaining in the profession for the duration of their careers.

LEADERSHIP PAY

Overview of the structure of leadership pay

Teachers' and school leaders' salaries are agreed as part of collective agreements for state and municipal civil servants of the education sector, which are concluded at intervals of 1-3 years. The negotiations are conducted between the education trade union and local authority employers which means that the same agreement is reached centrally and locally. The size of school is used to determine pay levels in basic education schools (ages 7-16).

Minimum teacher salaries are roughly in line with national GDP per capita and teachers must work 20 years to obtain the maximum basic salary. Basic school (age 7-16) salaries are around 85%-90% of secondary schools (age 16-19).

Component of pay	Present?	Comments
Pension	-	Information not found (arrangement may exist)
Travel allowance	-	Information not found (arrangement may exist)
Housing allowance	-	Information not found (arrangement may exist)
Extra responsibility allowances	●	Reduction in teaching load or remuneration based on calculated amounts. The formulas for these vary according to responsibility
Location allowance	●	Geographical location (high cost of living, disadvantaged or remote area) 2.37 % of the basic salary
Healthcare	-	Information not found (arrangement may exist)

● All schools	● Some schools	● No schools
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PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

As legislation does not define principals' duties in detail and as local authorities have very different circumstances, there is considerable variation in principals' job descriptions and therefore what is expected of them.

There is no national requirement to carry out an individual evaluation of teachers on a regular basis. However, in some schools principals must carry out annual performance and development discussions which are more forward-thinking than a traditional development appraisal – this is decided at a local level. The Eurydice report '*Key Data on Teachers and School Leaders in Europe*' reports that around 60% of teachers

are subject to an observation by a more senior member of staff, 65% are assessed on student achievement and 25% on teacher peer review.

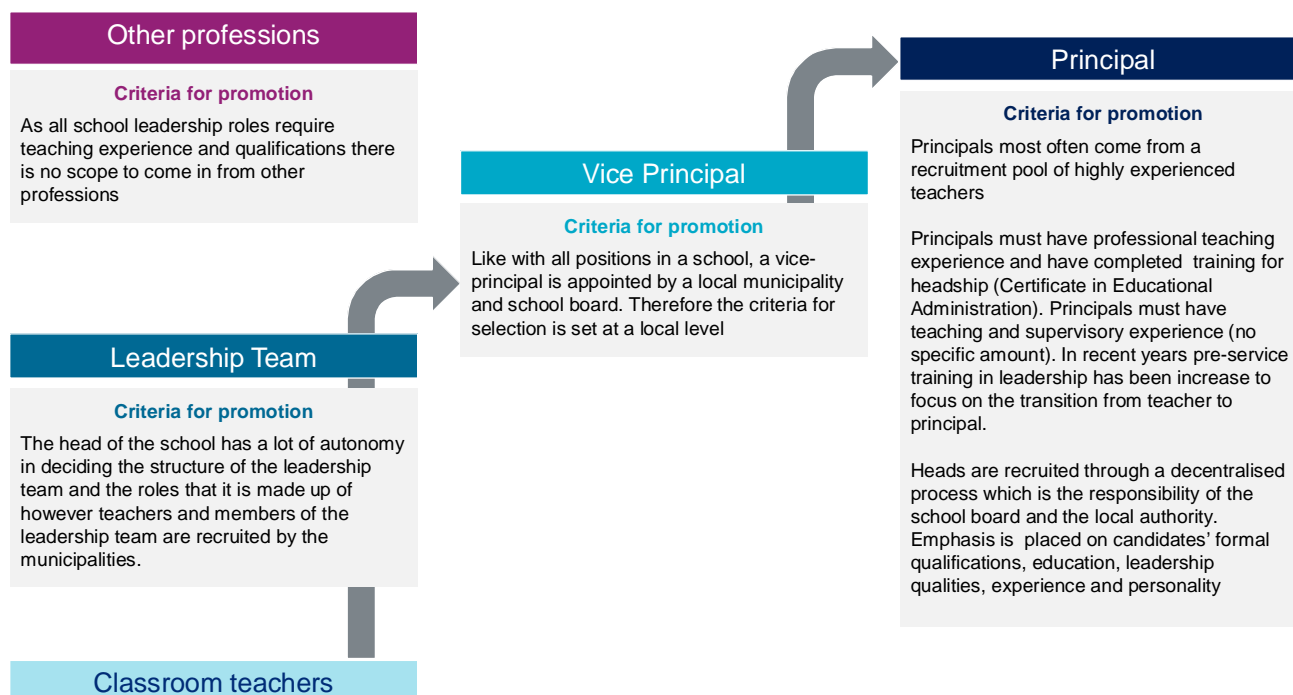
How is pay linked to performance?

There is no policy of performance pay for teachers or school leaders in Finland.

CAREER PATHS

Criteria for promotion

There are no clearly defined career paths in Finland because the system places so much emphasis on school teacher autonomy. Successful teachers may become principals, who are appointed by the local municipal authority. Principals do have financial responsibilities for the school budget, but they do not have a great deal of authority over the teachers – there is no tradition of principals observing teachers in order to evaluate them. In smaller schools, often principals have their own teaching load in addition to their other duties.



NON-PAY CONDITIONS – GENERAL

Autonomy is given to local municipalities to set non-pay conditions - the detailed task lists of school leaders and teachers were abolished as part of the 1991 deregulation process. There are some overriding principals that must be followed however, such as the requirement that each municipality funds at least three days of mandatory professional development each year, but beyond that, time spent on professional development varies widely.


Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	Those in leadership positions have reduced or no teaching hours, which is agreed at a local level and dependent on the size of school	Official teaching hours refers to hours of availability in school (31 hours per week) and overall working hours (40 hours per week) although this can vary for different subject teachers and is typically less for those that teach older age groups
Professional development	Around 60% of head teachers report that they engage in specific leadership CPD	Teachers have a professional duty to engage in CPD for 3 days per year
Planning and assessment	Set at a local level	Set at a local level
Management	Set at a local level	Set at a local level
Required to cover for colleagues	Around 40% of school leaders report covering for absent colleagues	Set at a local level
Annual leave entitlement	Information not found (arrangement may exist)	Information not found (arrangement may exist)



COUNTRY DETAIL


EDUCATION SYSTEM STRUCTURE

PRIMARY SCHOOL




Age 6 – 10
Compulsory from 6

SECONDARY LEVEL I



Age 10 – 16
Compulsory

SECONDARY LEVEL II



Age 16 – 19
Non compulsory

GOVERNANCE AND REGULATION

? *Who sets education policy – central government or local authorities?*

Administration of the education system in these areas is almost exclusively a matter for the individual states that make up Germany. The scope of the Federal Government's responsibilities in the field of education is defined in the Basic Law and includes ensuring consistency between States and setting overall policy

? *Who are head teachers accountable to?*

The local state authority

RECENT / PROPOSED CHANGES

- Competition between states to attract teachers by offering better remuneration and development (due to teacher shortage)
- Move to create more secondary schools that qualify for university
- Introduction of centralised examinations at State level and measures to ensure more professional teacher training
- New models for calculating working hours are in discussion : one proposed example for teachers is a 40-hour working week split 50% for teaching and 50% for preparation & meetings.

TYPICAL ROLES AND ORGANISATION STRUCTURE

Head Teacher

Deputy Head Teacher

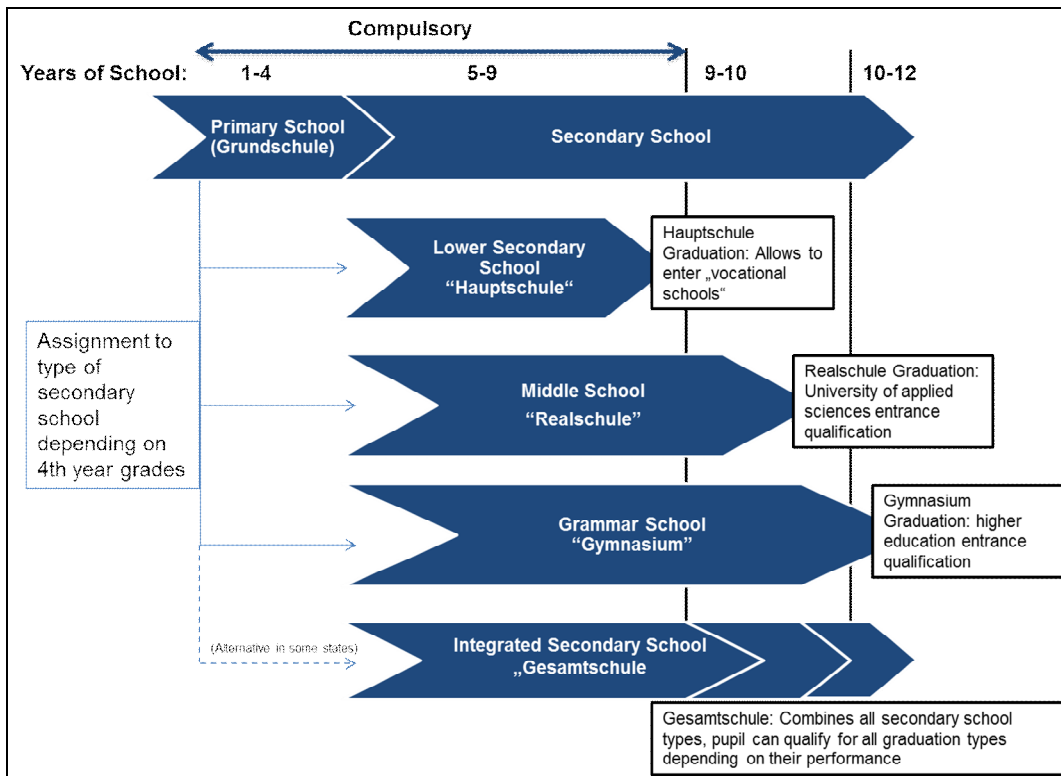
Head of Department

Classroom teachers

CONTEXT

Since 1990, the Federal Republic of Germany has been made up of 16 Länder (States) and under the Unification Treaty implemented in the same year, a common and comparable basic structure in education – particularly in the school system – was established.

Starting with the age of 6, children attend the first four years of compulsory primary school. After finishing primary school their last year's performance determines which secondary school they are admitted: Lower (Hauptschule), Middle (Realschule) and Grammar school (Gymnasium). In some regions, an integrated secondary school (Gesamtschule) is offered where differentiation takes place at a later stage. The type of school determines which kind of tertiary education is available for the student. The system is quite rigid with the pupils placed into the different types of schools based entirely on their academic performance. Nevertheless, there is the possibility to qualify for a higher level secondary school after finishing the assigned secondary school (e.g. middle secondary school after lower secondary school). More recently there has been a movement towards establishing an option for pre-university qualification at more secondary schools



LEADERSHIP PAY

Overview of the structure of leadership pay

Salaries for teachers and school leaders in Germany are bound by civil service grades (teachers share the same grades as other civil servants). The pay points differ in each of Germany's states; State law defines the specific allocation of different civil servant positions into the service grades and determines the corresponding salaries and allowances. Due to different legislations, the net income differs between states. For example, in 2010, Hamburg's teacher remuneration was approx. 5% above and Berlin approx. 8% below national average. Civil servants do not have to pay social security contributions (pension and unemployment insurance), apart from a subsidised private health insurance contribution.

Where they are placed on the salary scale depends on the type of school they work in and their job role as well as the size of the school (Gymnasium staff are graded higher than staff in elementary or lower secondary schools). In most states, there are seven salary steps at each grade and all employees move up salary steps dependent mainly on time in position and partially dependent on performance. The salary step pay increases are given in steady time periods. Depending on the state, the first salary steps takes place after each ~2 years, the middle steps grades every ~3 years and then finally every 4 years (until the highest step is reached, where the person remains if no higher position, e.g. head teacher, is vacant and applied for). These so called "Experience Times" after which a higher step is reached are determined by the respective state ministry for remuneration. The salaries per grade and step are regularly increased in line with the inflation.

On average, teachers' salaries in Germany are higher than those in other OECD countries, particularly for new teachers. Consequently, in Germany teachers' salaries compare somewhat more favourably to the salaries of other tertiary-educated workers than they do in other countries.

The table below only gives indications for the grade classification and might differ among schools







Grade	Primary school	Lower Secondary / Hauptschule	Lower Secondary School / Realschule	Lower & Upper Secondary School / Gymnasium	Other Civil Servants
A12	Teacher	Teacher	Teacher (depends on state and size of school)		Policeman
A13	Deputy Head Teacher or Head Teacher (Less than 360 pupils)	Deputy Head Teacher	Teacher	Teacher	Desk officer in a ministry
A14	Head Teacher (more than 360 pupils)	Head Teacher	Deputy Head Teacher (+ Allowance)	Senior Teacher	Commander of a battalion
A15	Head teacher if combined with Haupt- or Realschule	Head teacher if combined with Haupt- or Realschule	Head Teacher	Studiendirektor / Deputy Head Teacher (+ Allowance)	Full-time mayor in a town with up to 10,000 inhabitants
A16				Head Teacher	




How does leadership pay change?

Nobody can be promoted to a higher (civil) service grade without a change in his responsibilities or position. For a first promotion leading an extra-curricular activity is generally sufficient. A more senior promotion requires the change into a leadership position. Promotions into higher service grades are granted by the state school authority (Oberschulamt).

In the majority of States, school heads are responsible for quality, developing the school programme and steering all processes in the school. Depending on the size of the school, the difference in salary between the most senior teacher and the head ranges between 10%-26%. Similarly, many teachers, especially in primary and lower secondary schools see the high teaching load of the school heads (officially between 4-20 hours per week) as unattractive.

Other components of pay other than salary

Component of pay	Present?	Comments
Pension		All teachers are entitled to a pension and have contributions made to a pension fund on their behalf
Travel allowance		For study trips and trainings
Housing allowance		Information not found but may exist
Extra responsibility allowances		Allowances may be provided for certain extra responsibilities, such as service on committees or staff bodies or management.
Other		A special payment is often paid either per month or per year. Depending on the State, in 2011 the special payment amounts to between 30 and 65 per cent of one month's basic salary, or a fixed amount of between Euro 640 and Euro 1,000. In some States the annual special payment has been abolished; in others it has been incorporated into the basic salary.
Location allowance		Information not found but may exist although there are separate salary scales for each state
Healthcare		The state covers between 50%-80% of healthcare costs for civil servants. The remaining costs are normally covered by private health insurance, paid by the individual
Family allowance		e.g. Baden-Württemberg: EUR 234 per month for one child EU 343 with two children, up to EUR 1333

 All schools	 Some schools	 No schools
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PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

The Federal Education Department has issued appraisal guidelines for assessing teachers at public-sector schools. The basis for assessment (e.g. interview of the teacher, performance report by head teacher, and visit to lesson) must be detailed as well as the criteria (e.g. knowledge of subject, teaching record, professional conduct).

The performance appraisal process is managed mainly by the state school authority (Oberschulamt) who keeps all records relating the assessments. The Oberschulamt evaluates the teaching performance at

several fixed points of a career. The results are combined with the results of the state examination and build a grade average that is consulted prior to promotions to a higher salary scale and function (e.g. A12 to A13). Besides the possible denial of a promotion to a higher function and salary scale, an unsatisfying performance has no direct implications for the evaluated teacher due to the very high employment security for civil servants in Germany.

How is pay linked to performance?

Apart from the promotion into a higher service grade, it has been possible since 1997 to advance to the next salary step in case of consistently outstanding performance in only half the usual time (performance step). The performance step is granted to a limited amount of civil state servants per year by the school head (for teachers) and by the state school authority (for head teachers). It requires the nomination and careful evaluation of several candidates.

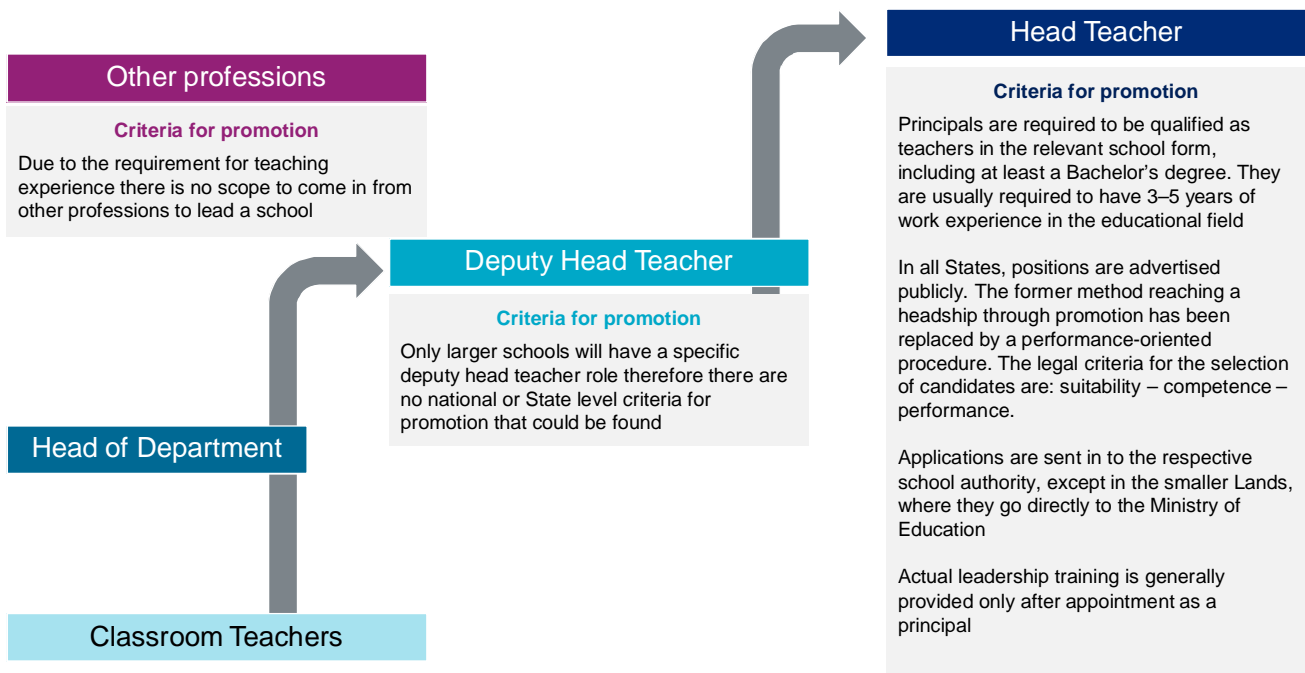
With the exception of the performance step, payment in general is not linked to performance (besides smaller exceptions in some states). A good performance has the most significant implication in the context of promotions. Over the last years several states started to link service grade promotions tighter to performance instead of years of service. (E.g. Hamburg does not determine a minimum experience time to become head teacher). The intention is to provide a more incentive-based system for motivated teachers in contrast to the former "promotion by years of service" oriented system.

CAREER PATHS

Criteria for promotion

The formal criteria and required professional experiences differ between states. As result of the recent reformation efforts, the most relevant criteria for promotion are aptitude, qualifications and record of achievement and not length of service. In Germany, the Oberschulamts prepares a proposal for selection of senior leaders in a multiphase process that involves consulting school representatives and also requires candidates to give teaching demonstrations. The selection decision is confirmed by the relevant State Ministry of Education, which usually follows unanimous proposals. Since leadership positions within the school system are only available for civil servants with a completed state examination and teaching experience, there is no possibility to come in from other professions.

A common path into leadership positions is to first take a function at the school authority Oberschulamts (e.g. examination of student teachers or in the committee for the final Abitur exams). There are special arrangements to divide the working hours between teaching and the authority function. This is a common way to recommend for a leadership position.



NON-PAY CONDITIONS – GENERAL

Non-pay conditions for teachers are agreed at a state level. Principals have a relatively high level of teaching responsibilities when compared to other OECD countries.

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	Deputy head teachers and head teachers are entitled to have their teaching hours reduced by the local authority	Teachers are required to work 1,793 hours a year, of which between 713 and 805 must be teaching time. This has increased since 2000
Professional development	Professional development for leaders varies by State. In Hessen, compulsory training is given to Head Teachers with More than 5 years' service. In Baden-Württemberg they have a module-based series of seminars (60 per year) for serving principals	The duty of teachers to undergo in-service training is expressly laid down in all Länder by law or ordinance, while it is the duty of the employers (usually the Ministries of Education and Cultural Affairs) to ensure that suitable training programmes are provided

Planning and assessment	Differs between states / Information not found but may exist	Differs between states / Information not found but may exist
Required to cover for colleagues	Almost half of head teachers report having to cover for absent colleagues (OECD report)	Differs from state to state, on average: 3hrs per week are compulsory and are not paid extra, if more hours are necessary they are extra paid
Annual leave entitlement	Entitlement to leave for teachers with civil servant status bases on general civil service regulations. Annual leave is taken during the school holidays. Holidays which extend beyond leave entitlement are used for in-service training, for preparing lessons or for other professional duties such as organisational preparations for the new school year. Days off outside of school holidays, e.g. for private matters, can be deducted from the salary	

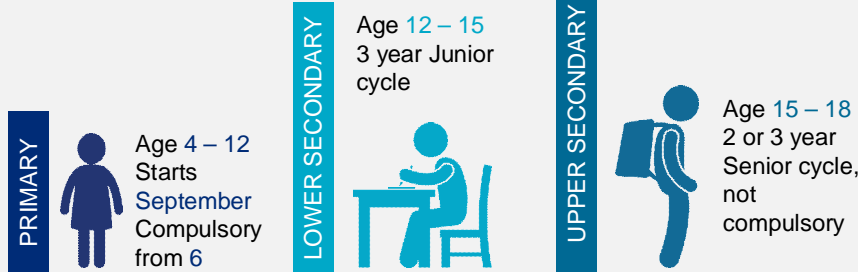
NON-PAY CONDITIONS – SPECIFIC TASKS

There is no specific agreement that was found to protect teachers from carrying out administrative duties.



COUNTRY DETAIL

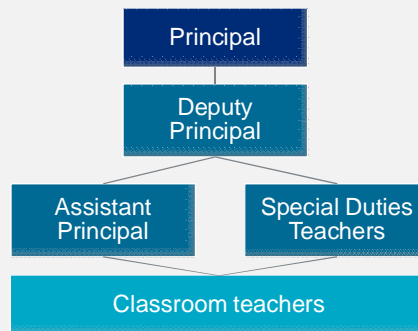
EDUCATION SYSTEM STRUCTURE



RECENT / PROPOSED CHANGES

- New salary scale and hourly/daily rates for appropriately qualified and registered New Appointee Teachers from 1 Feb 2012 (including abolishment of qualification allowances)
- School self-evaluations became mandatory as of 2012/13
- The use (and reporting) of standardised tests at three fixed points in primary schools became mandatory in 2012 and is expected to be extended to secondary schools in 2014

TYPICAL ROLES AND ORGANISATION STRUCTURE



? *Who sets education policy?*

The department of Education and Skills (DES) steers the education system. Schooling decisions are shared between the national government and School / Education and Training Boards. (Education and Training Boards manage vocational schools on a regional basis. Other schools have boards of management)

? *Who are head teachers accountable to?*

Head teachers are accountable to the Board of Management of the school/ Education and training Board

CONTEXT

The economic crisis has had a significant impact on Ireland and the education sector. There has been a substantial increase in youth unemployment and budget cuts in education. In particular, Ireland's immigrant student population and socio-economically disadvantaged students are facing academic challenges. The Department for Education is particularly aware that schools now need to deliver quality education for all students, with special attention to diversity and the most disadvantaged.

In particular, while Ireland's overall performance on the 2009 PISA assessment of 15-year-olds in reading, mathematics and science is close to the OECD average, there are large performance gaps between native and immigrant students. There have also been higher levels of dropout in post-compulsory education for socio-economically disadvantaged students.

The economic situation has led to pay reductions for teachers and new pay scales being introduced for those who became teachers in 2011 and 2012 that represents a pay cut on what they would have received had they joined the profession earlier. In addition to this, many allowances are being abolished for new teachers entering teaching after February 2012.

LEADERSHIP PAY

Overview of the structure of leadership pay






Teacher and school leader pay in Ireland is determined by a salary scale ranging from 1 (entry-level) to 25 (highest level). All teachers and school leaders are paid on the same salary scale range. They all move up one pay point per year. After 15 years' experience teachers can expect to earn among the highest salaries in OECD countries (ratio of 0.9 to earnings for full-time, full-year workers with tertiary education aged 25 to 64). However, teacher salaries have fallen considerably since the beginning of the economic crisis.

Changes to the pay scales have been introduced in 2011 and 2012. New teachers will be placed on reduced scales - those starting after January 2011 have a 10% reduction on the original pay scales, and from February 2012 a 4%-5% reduction from 2011 levels. Level of applications for teacher training courses has had a slight reduction but remains high - there are still 8-9 applicants per place.

How does leadership pay change?

School leaders in Ireland are part of the same salary 25-band scale as teachers, and their pay moves incrementally through this scale dependant on years of experience (one point per year). They receive an allowance on top of a normal teacher's salary if they are a special duties teacher, assistant principal, deputy principal or principal. For a principal, the allowance is divided into categories based on number of teachers in the school and type of school (primary / secondary). Special needs schools are classified as primary and secondary school allowances are higher.

Components of pay other than base salary

Component of pay	Present?	Comments (which schools and roles?)
Pension		From January 2013 teachers will become part of Ireland's Single Public Service Pension Scheme. The scheme provides a pension or retirement lump sum that is based on career-average pay
Travel allowance		n/a
Housing allowance		n/a
Extra responsibility allowances		Principals can receive an allowance if they act as Secretary of the Board of Management or if their school offers a part-time adult education programme (being abolished for those entering teaching after February 2012)
Other		Other allowances include qualification allowance (e.g. for a Masters degree), Island allowance, Gaeltacht allowance, teaching through Irish allowance and long service allowance. Most of these are all being abolished

		for those entering teaching after February 2012 All teachers are eligible for a payment under the supervision and substitution scheme if they agree to do things such as playground duty and agree to cover for colleagues. However, this payment will be lost for the next few years if the Public Service Stability Agreement is implemented
Healthcare	●	n/a

All schools
 Some schools
 No schools

PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

There is no formal appraisal system for teachers or school leaders. It is intended that problems relating to teaching competence are resolved, where possible, through informal means. To this end where the Board of Management has concerns that there may be issues relating to the standards of teaching of a Principal the Chairperson will discuss these issues with the Principal.

The whole school evaluation (WSE) includes an evaluation of the quality of school management, planning, curriculum and support for teachers. This process involves preparatory work and the submission of documents, a week-long school visit and post evaluation reports (verbal and written). Final reports are the posted on the DES website and are accessible to the public.

School self-evaluation has been introduced in 2012/13 and includes self-reflection by teachers. However, this is not at an individual level. Although there is no process for individual appraisal, the focus is on procedures that are in place for underperformance that aim to raise the performance of schools through performance management.

How is pay linked to performance?

Pay is not linked to performance. As stated above, school leaders in Ireland are part of the same salary 25-band scale as teachers, and their pay can move incrementally through this scale dependant on years of experience.

CAREER PATHS

Examples of the Duties of the Senior Management Team

Significant duties at principal level include:

- On-going development of school plan in consultation with staff of the school, and the Board of Management
- Drafting policies and procedures such as discipline procedures, homework policy, school calendar, admissions/enrolment policy, school environmental policy, information and communication

technology plan, gender equality plan in consultation with staff and the Board of Management and parents

- Consultation with individual members of the teaching staff in the school regarding curriculum matters, administrative policies and procedures, discipline and the provision of support and advice on such matters and promoting staff development
- Administrative duties such as the completion of data and returns to the Department of Education
- Liaising with members of the management team in the school
- Liaising with parents
- Liaising with the Chairperson of the Board of Management and other Board members regarding school policy and development
- Dealing with employment matters such as the employment of part-time and administrative staff
- Liaising with agencies such as Health Boards, Psychologists etc
- Organising of extra-curricular activities for the school
- Attendance at induction training courses and other in service courses approved by the Department of Education

Significant duties at deputy principal level include:

- Acting as Principal when the Principal is absent
- Assisting in the day-to-day running of the school
- Being responsible under the direction of the Principal for internal organisation, administration and discipline of the school

Significant duties at Assistant Principal level include:

- Year Head
- Responsibility for timetabling arrangements
- Responsibility for enrolment and monitoring of absenteeism
- Budgetary/Financial Administration Assistant
- Examinations Secretary
- Administration of School Library
- Co-ordinator of Work Experience Programmes, including placement duties

Significant duties at Special Duties Teacher level include:

- Subject/ Curricular Programme co-ordinator
- Assistant Year Head/ Class Tutor
- Co-ordination of school transport
- Supervising the maintenance of and availability of school equipment and facilities such as laboratories, P.E. halls, etc.
- Organiser/coordinator of external school visits
- State and school exams coordinator

Criteria for promotion

School leaders currently focus more on administrative than pedagogical leadership tasks. Principals must be qualified teachers and, in general, have at least five years of teaching experience (except in primary schools of fewer than 80 pupils). There is no formal requirement for leadership training, but many applicants have related diplomas (e.g. management, administration, education) and many complete non-accredited courses for school leaders.

The revised promotion procedures (2011) for appointment to deputy principal, assistant principal and special duties teacher states that the criteria for selection for primary schools are as follows:

- Length of service (30 marks)
- Knowledge, understanding and capacity to meet the needs of the job (15 marks)
- Capacity to contribute to the overall development of the school (15 marks)
- Interpersonal and communication skills (15 marks)
- Capacity to contribute to the overall organisation and management of the school (15 marks)

A system is being phased in whereby all criteria will have an equal weighting of 20 marks each. This system is also being phased in for Assistant Principal and Special Duties Teacher appointments at post-primary level.

No standard criteria for deputy and principal in post-primary, no standard criteria for Principals in primary schools. However, the development of standard criteria is under discussion between the Department of Education and Skills, teacher unions and school management bodies.

NON-PAY CONDITIONS – GENERAL

Non-pay condition	Leadership positions	Classroom Teachers	Comments
Typical teaching hours	The majority of school leaders do not regularly teach in the classroom in large schools. There are a lot of small schools in Ireland where the school leader would be teaching (around half of schools in Ireland)	Primary school teachers teach 915 hours/year on average (183 days of tuition) Secondary teachers teach 735 hours/year on average (167 days of tuition)	This is the sixth highest among OECD countries
Professional development, Planning and assessment	No protected time. Bank of hours outside of tuition time that was set aside for other purposes (33 hours in primary and 36 in post primary per year). Induction planning, PD, staff meetings, PT meetings		

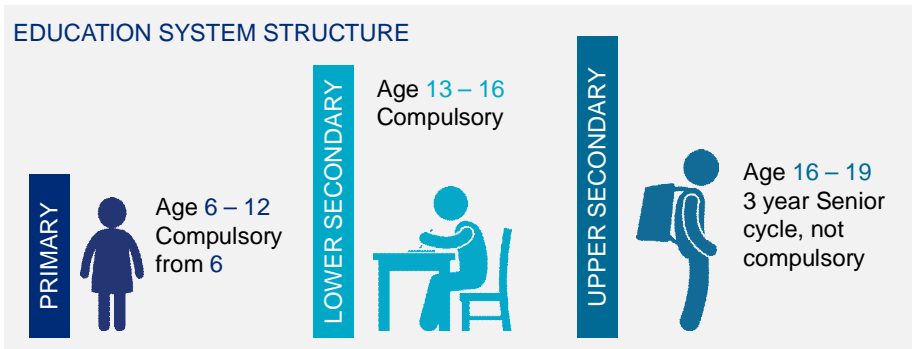
Required to cover for colleagues	Under the supervision and substitution scheme there is an obligation for 1.5 hours a week (37 hours a year) to cover for absent colleagues if needed at post-primary level. Teachers receive an extra allowance, though the payment will be withdrawn for the next few years if the Public Service Stability Agreement is implemented and the obligation will increase to 43 hours per year/ 3 hours per week. At primary level, either a substitute teacher is employed or classes are divided among the other teachers
Annual leave entitlement	There is no set annual leave allowance for teachers, though they all have the statutory entitlement of 20 days per year. Annual leave normally comprises the school holidays – teachers can't take annual leave on tuition days. Principals and deputies would often come in to do work in the holidays

NON-PAY CONDITIONS – SPECIFIC TASKS

There is no document that specifies what duties and specific tasks are expected of teachers and leaders, or what they are protected from doing, though certain duties are set out in the Education Act or have been agreed through various pay agreements. In smaller schools, of which there are many in Ireland, teachers may be expected to do these tasks.

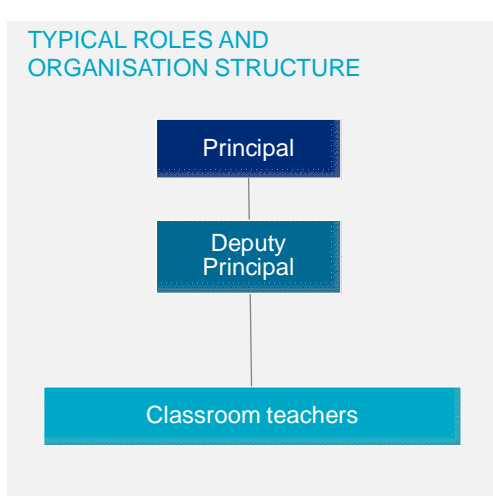


COUNTRY DETAIL



RECENT / PROPOSED CHANGES

- In 2003 responsibility to negotiate teacher salaries with the teacher's unions transferred from the state to the Association of Local and Regional Authorities meaning there is more power at a local level to determine pay and conditions
- In 2009 a national principal education program was introduced with the aim to increase quality and consistency across the country



? *Who sets education policy – central government or local authorities?*

Primary schools are predominantly 'owned' by local municipalities of which there are 430. Secondary schools are run by the 19 councils that make up Norway. The central government define overall goals, legal frameworks and structures for education

? *Who are head teachers accountable to?*

Primary school heads are accountable to the local municipality, secondary school heads to the local council.

CONTEXT

Over the past decade since the first PISA results were published Norwegian authorities have focussed on the monitoring of quality in education and spending on education remains towards the upper end of OECD countries. There is a concern about the differences between municipalities in levels of performance and there has been a concerted effort to reach a consistency across the country, which challenges the traditional autonomous view of the educational system. There is also a drive to improve the qualification of teachers and ensure there are more teachers trained in their specialist subject. Despite this there is a consensus to provide a trusting, not controlling environment for teachers and retain a degree of autonomy. The organisational structure of schools in Norway is typically flat with few promoted posts.

LEADERSHIP PAY







In Norway, there is a tendency towards a self-governing system for schools in terms of setting teachers' and school leaders' salaries although this must be within the framework of the collective agreement that applies to the particular area and type of school. Teachers' and school leader salaries depend largely on the type of position and on seniority.

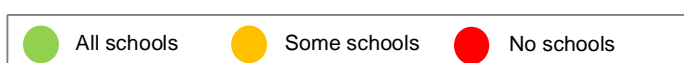
Collective Agreements consist of a basic agreement and a main collective agreement. The Basic Agreement concerns mainly participation, rights and obligations and it does not regulate wages. The General Collective Agreement regulates many factors include wages, working conditions, pension and insurance schemes. All General Collective Agreements have their individually negotiated 80 point pay scales. Collective agreements may contain any special provisions or exceptions for managers.

Teachers typically earn less than full time workers with a tertiary education. Teacher salary scales in Norway are typically flatter than those in other OECD countries and it takes around 16 years for a teacher to reach the top of the scale.

Salary for school leaders in particular depends on the role, type of school and number of pupils. Whilst a small proportion of the pay may be a result of performance, this is decided locally. School owners have some room for pay differentiation between teachers and leaders at the same level. However at an individual school level this practice is inconsistent and salary differences are thought to be largely disconnected from performance or commitment.

Wages increases are determined by taking into account the complexity and responsibility associated with the position and the employee skills. The very highest salaries will be paid only if negotiated especially due to competence.

Component of pay	Present?	Comments
Pension		All state employees are automatically members of The Norwegian Public Service Pension Fund, and teachers will remain so by special agreement even though counties and municipalities employ them
Travel allowance		Travel associated with work is reimbursed
Housing allowance		Not offered
Extra responsibility allowances		Reduction in teaching load or remuneration based on calculated amounts. The formulas for these vary according to responsibility. Teachers will be paid extra if they have specific additional tasks, such as counselling, responsibility for a group or participation in camp school
Location allowance		Geographical location (high cost of living, disadvantaged or remote area) 2.37 % of the basic salary
Healthcare		Not offered



PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

National regulations state that the process must implement teacher and school leader appraisals but it is not regulated at a state level. Employing authorities (municipalities in the case of primary schools and councils in the case of secondary schools) have the freedom to set their own frameworks for appraisal; however few have established systems in place. The most common feedback for senior school leaders is via a conversation with the school principal. There is no clear link to professional development or pay in the majority of Norwegian municipalities and councils or definition of what would constitute a high-performance teacher because of a lack of framework at a national level.

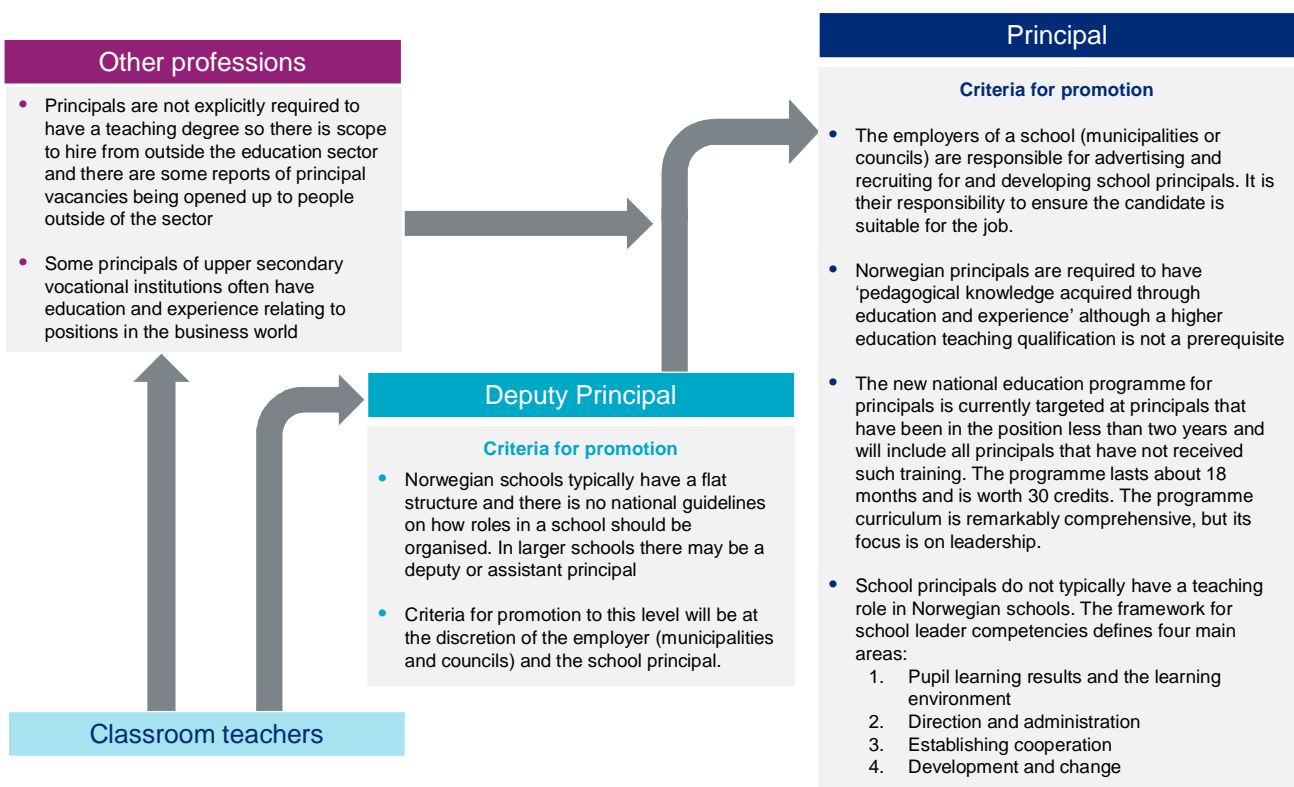
One example of an exception is the city of Oslo, which has implemented a systematic approach to appraisal with compulsory observations and student evaluations conducted for all teachers and leaders. It is hoped that the new national education programme for principals will increase confidence of principals in giving performance appraisal feedback across the country.

How is pay linked to performance?

The performance appraisal process is expected to inform professional development. It is rare that career advancement or changes in pay are direct consequences of a performance appraisal.

CAREER PATHS

The OECD reports that there is a lack of a defined career path for effective teachers into leadership positions in Norway – i.e. there are no steps for the increasing level of teacher such as expert teacher. There are few opportunities for promotion and recognition within or beyond schools. Recruitment for most positions in schools are assessed on level of education, marks obtained, and years of working practice.



NON-PAY CONDITIONS – GENERAL

Working conditions for teachers are regulated partly by law and regulations, partly by various agreements between trade unions and the government. There are agreements that apply only to teachers, between unions and the Ministry of Education and Research, negotiated as equal partners. The government decided on 31 January 2003 to transfer the responsibility of trade negotiation with the teacher organisations to the school-owners (counties and municipalities).

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	Leadership positions receive a reduction in teaching hours	Annual teaching hours differ at a primary level (741 hours) and a secondary level (654 hours). These were increased in 2005. The total time teachers are required to work over the year is 1,688 hours per year
Professional development	Not disclosed	Teachers are required to spend five days per year on CPD but typically they spend 5-10 days. Increasing funding in this area from the state government to ensure all teachers are properly qualified for their subjects
Planning and assessment	Not disclosed	Teachers have a mandatory 150 hours at school, usually 5 hours per week used for meetings, planning etc. The rest of the working time (less teaching time) is at the teacher's free disposal, at school or at home
Management	Not disclosed	
Required to cover for colleagues	For replacing teachers that will be absent for a few days or weeks, due to illness or training courses, schools usually contact a supply teacher from a list of those locally available. Depending on local labour market conditions, supply teachers may be qualified teachers that are retired, unemployed or recently graduated. Supply teachers may also be not fully qualified, with a university degree or as students. If supply teachers are not available, colleagues may have to assist	
Annual leave entitlement	Not disclosed	Not disclosed

NON-PAY CONDITIONS – SPECIFIC TASKS

There is no specific agreement that was found to protect teachers from carrying out administrative duties.



COUNTRY DETAIL

EDUCATION SYSTEM STRUCTURE

PRIMARY

LOWER SECONDARY

Age 7-16
Compulsory from 7
Swedish primary school lasts nine years and is divided into two stages: the first five years and the last four years



UPPER SECONDARY

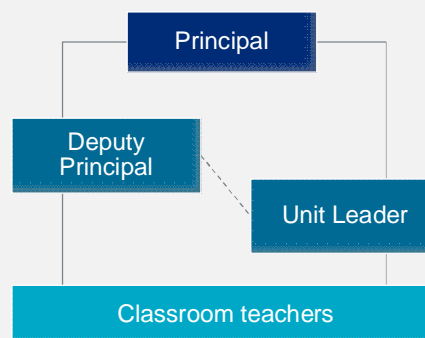


Age 16 – 19
3 year Senior cycle, not compulsory

RECENT / PROPOSED CHANGES

- In the Education Act of 2010 changes were implemented such as re-introducing senior subject teachers into the entire school system (a teacher or pre-school teacher who has passed a Licentiate or doctoral degree and has demonstrated excellent quality of teaching over a period of service of at least four years is to be appointed a senior subject teacher)
- Individualised pay was introduced in 1995

TYPICAL ROLES AND ORGANISATION STRUCTURE



? *Who sets education policy?*

National objectives and guidelines for the public education system are laid down by Government. The individual authority – a municipality or a board of an independent school may determine how its schools are to be run. Teachers and school heads are responsible for students achieving the educational standards and goals set by the national government

? *Who are head teachers accountable to?*

The local municipality board of education

LEADERSHIP PAY






Overview of the structure of leadership pay

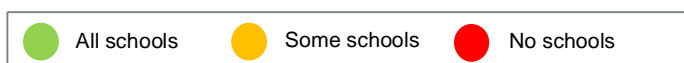
The Swedish system for remuneration of teachers is unique from an international comparative perspective in that it does not involve fixed pay scales, but is based on a decentralised individual pay scheme which replaced pay scales in 1995. Local collective agreements are agreed upon within the framework of central agreements and then pay rates are negotiated at an individual level. Currently there is no ceiling for pay but an agreed minimum salary after one year of probationary employment for newly qualified teachers. The reason for introducing a decentralised, individualised pay system was to give the employers responsibility for setting pay rates in order to stimulate improvement in effectiveness, productivity, and quality in the workplace. An important part of this reform was to improve the recruitment and retention of teachers and to link pay to performance.

Local municipalities decide on the share of the municipality budget that should be attributed to teacher and school leader pay. Usually, the School Principal is responsible for the distribution of pay in their school which often needs to be approved by the Union of Teachers. The Principal's pay is usually set by the municipality. In both cases, the factors taken into consideration when setting pay are usually decided by the school but would include experience and number of years' service. Often, the subject a teacher specialises in also becomes a factor as there may shortage of teachers in some subjects and an abundance of teachers in

another. The ultimate goal of the pay process in Swedish schools is that the closest manager of the teacher will manage the pay review process with less involvement from Unions.

The transformation of the salary system for school leaders from a centrally designed tariff system into a system of individual salaries that started in the late 1980s has led to a larger variation between salaries of school leaders. Principals of Upper Secondary schools typically earn more than those of a compulsory school. Compared to other groups of managers in the Swedish society, the average level of payment is somewhat higher than managers working for the state and municipalities, but much lower compared to managers working for private firms with comparable areas of responsibilities. Additionally, there is often not a substantial difference between a Senior Teacher's salary and a Deputy Principal's salary, meaning that often those eligible to apply for leadership positions do not.

Component of pay	Present?	Comments
Pension		Public sector pension plan
Travel allowance		At the discretion of local municipalities and schools
Housing allowance		At the discretion of local municipalities and schools
Extra responsibility allowances		At the discretion of local municipalities and schools
Healthcare		Not normally provided



PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How does leadership pay change?

Pay decisions are made by the School Principal, in the case of other teachers and Deputy Leaders, and by the Director of Education, or local municipality in the case of the School Principal. There are no national standards for pay, except for a minimum wage at which newly qualified teachers start. It is up to each municipality to make their own policy on how pay levels are decided.

How is performance managed?

As the pay system for teachers in Sweden is individually based (i.e. does not use pay scales), salaries are usually linked with objectives and performance although appraisals are not compulsory. The performance of school heads is supervised by the Schools Inspection (although they have no responsibility to hire/fire/promote staff the inspection may lead to consequences for an individual school head).

The performance of teachers and the school leadership team is assessed by the School Principal; this is usually done through an annual or biannual dialogue about the individual salary of each teacher. All teachers go through processes of goal setting and self-evaluation. Most municipalities have developed an evaluation tool which is often adapted at an individual school level – all evaluations consider local objectives and priorities (which are often filtered down from objectives of the Department for Education and Research).

How is pay linked to performance?

In the agreements between the employer's organisation (SALAR) and the teacher unions there is a clear statement that pay should link to results, however teachers are often evaluated on the basis of degrees of effort and commitment rather than in relation to what they have achieved in terms of stated objectives.

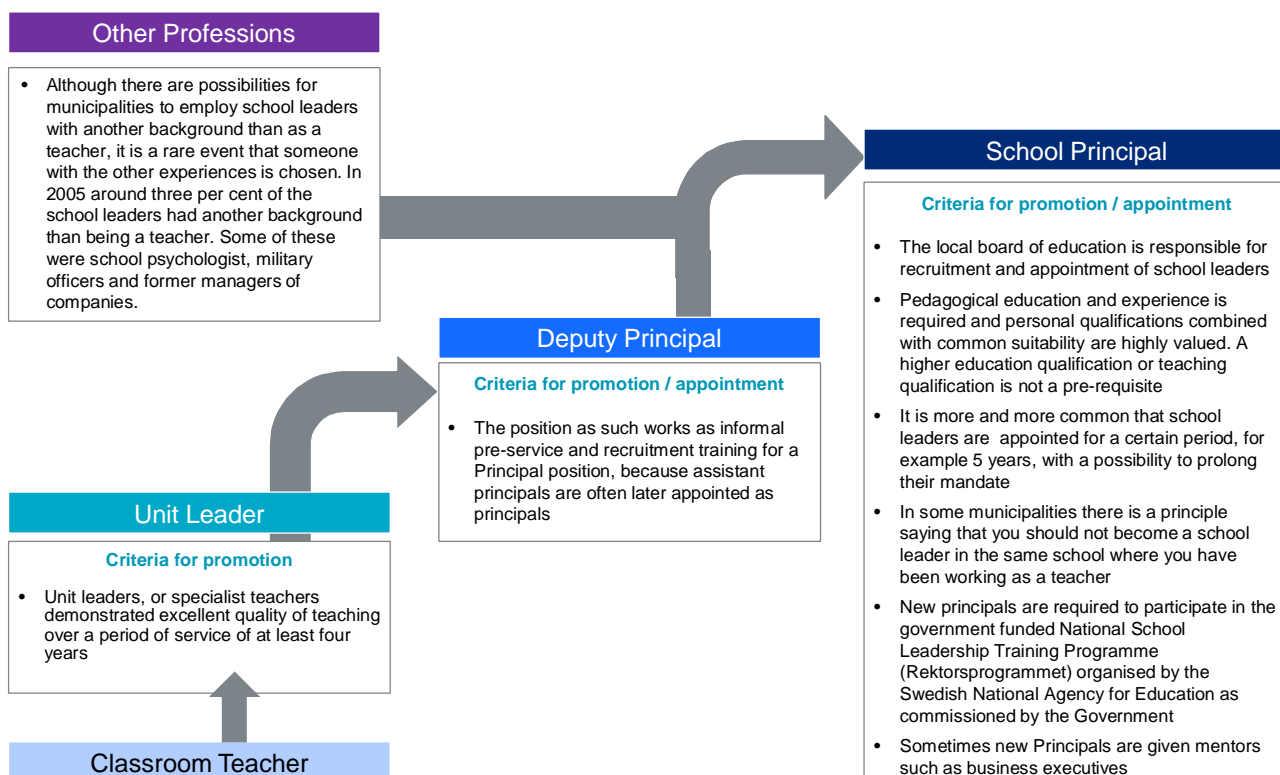
In some Municipalities, performance of teachers, leaders and schools are rated on a clearly defined 1-5 scale. If a school performs well on this scale then extra budget may be allocated for teacher and leadership pay. Individualised pay is seen by some Principals to give them a vital tool in attracting, retaining and recruiting teachers that are committed to their school. It has also made more obvious those teachers that are underperforming, and in some cases they have decided to leave the teaching profession. However, high wages awarded to new recruits often mean that rewarding top performers is more difficult. This is reflected in a recent survey conducted by Lärarnas Riksförbund that found:

- 2 out of 3 teachers do not see any connection between their performance and their salary
- 1 out of 3 teachers has had his/her wage set without a meeting for salary negotiation with the employer
- 6 out of 10 teachers were never visited by their wage-setting supervisor while teaching
- 7 out of 10 teachers had not had any communication with the school principal this semester regarding the development of the pupils' results

Cash bonuses are rare if awarded at all. A "bonus" could maybe be a Christmas staff party or something similar but it is highly unusual for class room teachers to get monetary bonuses.

CAREER PATHS

There is no pre-service training requirement for aspiring principals. In-service training is the responsibility of the schools' maintaining organisations.



NON-PAY CONDITIONS – GENERAL

In Sweden, many non-pay conditions are set at a local municipality level, especially for leadership positions. A recent survey of 869 principals (see <http://www.ur.se/Produkter/174229-Rektorerna/Rektorsbarometern/Arbetstider>) found that 67.5% work 40-50 hours a week and 24.5% work 50-60 hours. The highest ranked way that principals spend their time was administration and finance duties, followed by pupil matters and staff matters.

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	At the discretion of local municipalities and schools	Regulated working time is 1360 hours distributed over a maximum of 194 working days per year – this is made up of teaching time and protected time
Professional development	Information not found but may exist	Teachers are given protected time of 407 hours per year which can be used for preparation, follow up, contact with pupils and parents and personal development
Planning and assessment	Information not found but may exist	
Management	Information not found but may exist	
Required to cover for colleagues	At the discretion of local municipalities and schools	
Annual leave entitlement	Information not found but may exist	

NON-PAY CONDITIONS – SPECIFIC TASKS

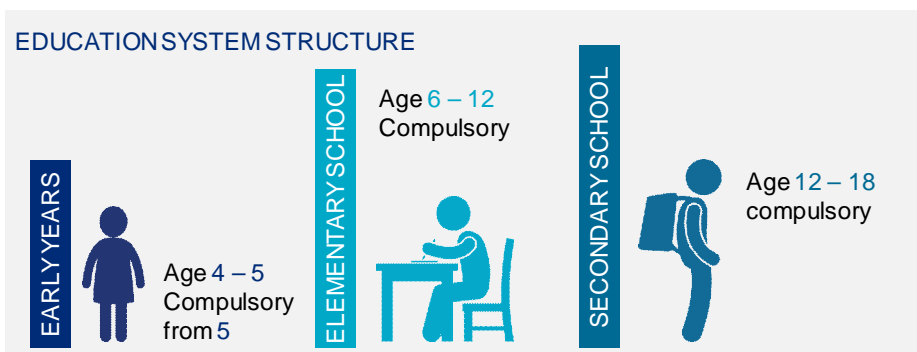
There is no specific protection for teaching staff from performing certain administrative duties; this would be under the discretion of local municipalities.

DETAILED FINDINGS

NORTH AMERICA



COUNTRY DETAIL



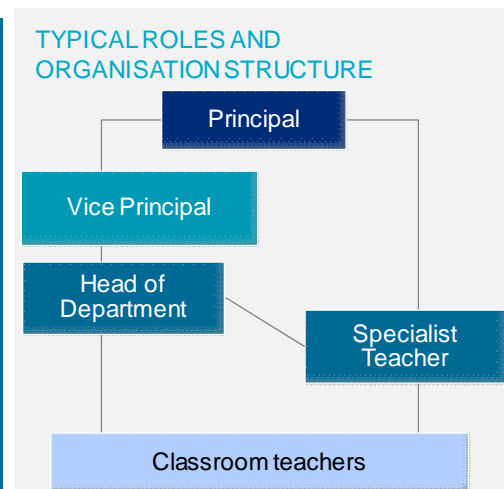
? *Who sets education policy – central government or local authorities?*

Each province has its own Ministry of Education, which is run by an elected Minister of Education which is overseen by the Council of Ministers of Education. School boards are responsible for ensuring compliance with the Ministry’s legislative requirements in the schools within their jurisdiction.

? *Who are head teachers accountable to?*

The School Board

- ### RECENT / PROPOSED CHANGES
- Conditions for Principals and Vice Principals are currently being reviewed which includes studies of workloads, creation of benefit plans and possible revisions of overall framework agreements
 - Ontario is specifically targeting an increase of specialist teachers with the aim to increase educational performance in key subject areas



CONTEXT

Since PISA was first released in 2000 Canada has remained a top-performer, with Ontario, one of the country’s most populous provinces, demonstrating particularly strong results.

In Canada, there is no federal level education ministry with oversight of the whole country. Instead, each of the ten provincial and three territorial governments is responsible for developing curriculum and determining major education policies and initiatives. This collaboration is aided by the Council of Ministers of Education, Canada (CMEC), which is comprised of each of the heads of the provincial ministries of education.

Ontario educates 40% of Canada’s five million students, and has one of its most diverse populations. Teacher education programmes are highly selective and draw from the top high school students in each province. There are clear guidelines for pay and performance appraisal set out by the Ministry of Education, for which it is each individual school board’s responsibility to implement.

Teachers unions are among the strongest in Canada. In the last 5 years the educational services industry has been comprised of approximately 72% unionized employees. This is similar to the percentage of unionized employees in the public sector as a whole. In the past several years, the teacher’s unions have been at odds with provincial governments, particularly in Ontario, where there has been an effort to freeze salaries in order to address the record government deficit by staving off cost increases. While some public

sector unions have agreed to a wage freeze until 2015, the teachers have fought hard through negotiations to continue salary increases.

A specific example of how Ontario teachers have negated union salary freezes is through “work to rule” campaigns and various strike efforts. In the past year, the Ontario Government has restricted teacher’s ability to strike and cut the number of sick days (from twenty per year to ten) and eliminated the ability to cash-out sick days upon retirement. Previously, teachers had the ability to carry-over unused sick days to retirement and then receive a cash pay-out.

Across the country there is currently a significant teacher surplus. According to labour forecasts carried out by Human Resources and Skills Development Canada, over the 2011 – 2020 period secondary and elementary school teachers will experience excess demand in the market by about 5%. The cause of this spans economic, political and social issues:

- Canada’s low birth rate is decreasing the need for schools and teachers
- Fewer teachers are retiring due to affordability of retirement and decreased value of pension due to the global economic downturn
- During “work to rule” campaigns, extra-curricular activities are eliminated (e.g., sports and arts) – as a result, students (and/or their parents) move them out of the public school system and into private schools or to other Boards where teachers are less likely to strike (e.g., Catholic Boards)
- Families are moving out of neighbourhoods where schools currently exist (due to high housing prices) to newer or less expensive neighbourhoods (typically where schools need to be built to accommodate the growing population)

LEADERSHIP PAY

Overview of the structure of leadership pay

For calculating teacher and school leader pay in Ontario, salary grade progressions are used. Within a given School Board, there will be separate scales for each union (although they are closely aligned), as well as scales for non-classroom teachers (called ‘Coordinators’ and ‘Assistant Coordinators’) who are responsible for specialized areas of education within the school or Board (e.g., Special Education). Coordinators and Assistant Coordinators may be qualified Principals or Vice Principals working in a non-leadership role.






Principals and Vice Principals are not unionized; however they are represented by a Principal’s Counsel which works as an advisory group to negotiate a pay grid with the School Board (details of which are not disclosed to the public). Although the details of the pay grid are not available, in Ontario there is a requirement for public sector employees who are paid > \$100K to be disclosed, this can be accessed at: <http://www.fin.gov.on.ca/en/publications/salarydisclosure/pssd/orgs.php?organization=schoolboards>.




Salary scales for teachers in Ontario are determined by the School Board based on academic credentials and teaching experience. Teachers are categorized into groups in the salary grid based on Certification Rating Statements (i.e., level of each individual teacher’s education from Bachelor’s degree to Honours Bachelor’s degree, Master’s degree, PhD, etc.) provided by the Teacher’s Federation and gradually move up the salary steps as they gain more teaching experience.

Canadian teachers reach the top of the teacher pay scale much more quickly than in most countries, typically only needing about 12-15 years of experience to earn the maximum salary.

How does leadership pay change?

Promotion to principal level is dependent on qualification and experience, but candidates are also assessed on a range of competencies.

Component of pay	Present?	Comments
Pension		In Ontario, teachers receive a pension based on their years of service and their best five years average salary. Annual pension contributions for teachers equal to 10.8% of pay up to \$50,100 a year and then 12.4% of any pay above \$50,100. A teacher earning \$75,000 in 2012 will contribute \$8,498 to her pension plan, while a teacher earning \$51,000 will contribute \$5,522 to his pension
Travel allowance		In Ontario, teachers who use their vehicles from time to time for school business which has been approved by the teacher's superordinate shall be reimbursed at \$0.50 per kilometre for the first 5,000 kilometres in a calendar year and \$0.45 per kilometre for subsequent kilometres travelled
Housing allowance		None
Extra responsibility allowances		Allowances are payable to teachers who hold positions of responsibility or work in Special Education. These allowances differ for each type additional responsibility in each type of school (e.g. elementary, secondary)
Healthcare		In Ontario, all teachers and school leaders receive extended healthcare benefits (100% funded by the employer), semi-private hospital healthcare benefits, dental benefits and life insurance (cover options available)

 All schools	 Some schools	 No schools
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PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

Ontario has an established performance appraisal system termed 'Teacher Performance Appraisal' (TPA) system. There is a detailed manual which provides guidance on how performance should be managed in individual schools. The TPA system has two components: one for "new" teachers and the other for "experienced" teachers but does not apply to certified teachers employed outside the publicly funded education system or to instructors in teacher education institutions.

The TPA system involves the following components for all new and experienced teachers

- **Competency statements** that describe the skills, knowledge, and attitudes that new and experienced teachers must reflect in their teaching practice
- **Classroom observation** of the teacher by the appraising principal, agreed to by both parties. Prior to each observation, the teacher and principal discuss the competencies that will be the focus of the observation
- **Appraisal meetings** that promote professional dialogue between the principal and the teacher.
- **A summative report** that documents the appraisal process. This report becomes a vehicle for teachers to reflect on the feedback they have received and to identify opportunities for growth. It also provides the means by which principals inform teachers of their TPA rating
- **A rating** that reflects a principal's assessment of a teacher's overall performance. The rating used for the first appraisal of new teachers is either Satisfactory or Development Needed. Experienced teachers are rated as either Satisfactory or Unsatisfactory at all appraisals

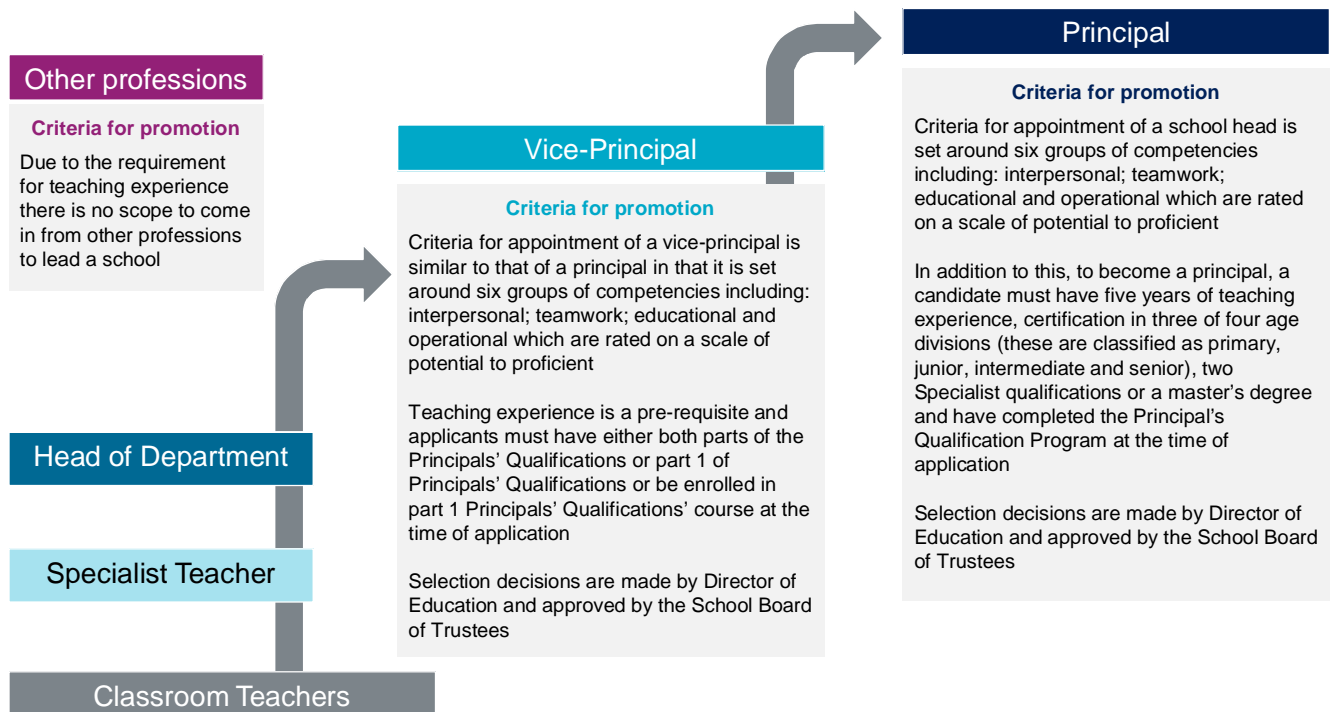
Principals are responsible for conducting performance appraisals of all teachers assigned to their school. These appraisals must be conducted in accordance with legislative and regulatory requirements, relevant ministry guidelines, and any other requirements specified by the board.

How is pay linked to performance?

In 1920 the OSSTF (Ontario Secondary School Teacher's Federation) implemented the current single schedule pay system to advocate for pay equity. This system is based on qualifications and experience and does not reward teacher performance. Still today, there is no performance-related pay in Ontario. Given the strained relationship between the provincial government and the teachers, it is unlikely that a performance based system will be put in place in the near future. However, the prevalence of performance based pay has increased in other areas of the public sector, in particular the health care sector (which is also publicly funded).

CAREER PATHS

Successful teachers may be promoted to department head and can take part in professional development and training to take on leadership roles in the school and the school system later in their careers. There are many resources to help senior teachers assess their readiness to apply for a principal or vice-principal position. They are encouraged to review the Principal/Vice-Principal Selection Process Rubric and use the six identified Leadership Competencies to record specific examples that show they have demonstrated each competency in action at a school, Family of School (FOS), and/or system-wide level. Once appointed they must participate in a compulsory induction programme. School boards overtly plan for leadership succession. The process of attracting and preparing the right people begins before there is a vacancy to be filled. Mentoring is available during the first two years of practice for principals, vice-principals, supervisory officers and directors. Principals and vice-principals are required to maintain an annual growth plan, and their performance is appraised every five years, based on student achievement and well-being.



NON-PAY CONDITIONS – GENERAL

In Ontario, Collective Agreements between District School Boards and the Teacher's Federation sets out in a legal framework pay and non-pay conditions.

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	Principals typically do not have teaching responsibilities. Vice Principals may have teaching responsibilities depending on the size of the school (e.g., school may not require a full-time Vice Principal, so the role may be 50% Teacher and 50% Vice Principal)	Exact teaching hours depend on the Board and union. In Ontario, a typical teacher has classroom time of 1500 minutes per week (25 hours) and 300 minutes of preparation time
Professional development		The Annual Learning Plan is a document that experienced teachers are required to prepare and update each year. It provides a vehicle for the teacher's professional learning both during the appraisal year and in the intervening years between appraisals. The budget for professional development for teachers is included in the budget provided by the Board In Ontario, teachers receive 4 "Professional Development Days"
Planning and assessment	Not applicable	Every full-time teacher's timetable should include an amount of assigned preparation time equal to one credit course (in the case of secondary education)
Required to cover for colleagues	Principals and Vice Principals may have to cover for absent teachers "in a pinch"; however this is not common practice. More commonly, Principals may have to cover for other Principals (at other schools)	Teacher absences are typically managed through supply/substitute teachers. However, in cases where a supply teacher is not available, teachers may have to cover classes for others. In Ontario, teachers are reimbursed for their time in the form of time in lieu within 14 days
Annual leave entitlement	Principals and Vice Principals typically work the week before and after school starts; however, this schedule is not	In Ontario, the school year runs from the first Tuesday in September through to the last Friday in June. Teachers receive holidays through the year (Christmas break and March break – both approximately 1 week), in addition

	In addition to times when the school is closed, leadership typically receives between 3 and 8 Lieu Days	to sick days (10 per year – non-bankable) and make take voluntary leave up to 5-days un-paid
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NON-PAY CONDITIONS – SPECIFIC TASKS

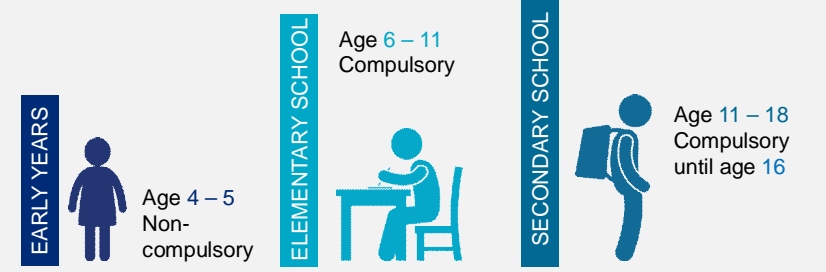
Task	Leadership positions (separated if necessary)	Classroom Teachers	Comments (including legality)
Bulk photocopying	●	●	Collective agreements in Ontario state that “No teacher shall be required to perform as part of that teacher’s regular duties any duties normally and regularly performed by secretarial or custodial staff”
Producing standard letters to send to parents	●	●	
Producing class lists	●	●	
Preparing classroom displays	●	●	
Analysis of attendance figures and management of attendance issues	●	●	
Setting up IT equipment	●	●	
Stocktaking	●	●	
Taking note of meetings	●	●	
Management of data in school management systems	●	●	
Supervise other members of staff	●	●	
Contribute to recruitment	●	●	Principals, in collaboration with the School Board will recruit members of staff
Take part in, and manage performance appraisal system	●	●	Principals are responsible for managing the performance appraisal process
Communicate with parents	●	●	

● All schools	● Some schools	● No schools
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COUNTRY DETAIL

EDUCATION SYSTEM STRUCTURE



GOVERNANCE AND REGULATION

? *Who sets education policy – central government or local authorities?*

Individual schools in New York are governed primarily by a district and board of cooperative educational services (BOCES) which looks after all schools in that district and ensures schools adhere to state and government educational policies

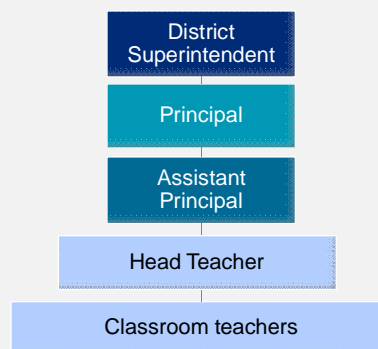
? *Who are head teachers accountable to?*

School principals are accountable to a District Superintendent

RECENT / PROPOSED CHANGES

- From July 2011 all teachers are subject to a performance appraisal
- One of the important changes in the current collective bargaining agreement between the United Federation of Teachers and the Department of Education is the creation of an open market hiring process that will increase opportunities for teachers and other current staff applying to seek positions in different schools throughout the system

TYPICAL ROLES AND ORGANISATION STRUCTURE



CONTEXT

The United States education system has a strong tradition of local control - major decisions around how and what students are taught and how schools and districts operate are made at a local district level. The Federal Education Department provides some funding and oversees the system, producing policies and legislation that local education boards must adhere to such as 'No Child Left Behind'. This report focuses on the New York City district.

Whilst the United States has enjoyed a history of high performance in their education system, more recently other countries have caught up – especially in the area of tertiary education. The U.S. is the only country where attainment levels among those just entering the labour market (25-34 year-olds) do not exceed those about to leave the labour market (55-64 year-olds). In response to this President Obama has set a target for the country's education professionals to have the highest proportion of university graduates by 2020 which has a knock on effect for teachers and school leaders across the country – for them to be better prepared, supported, evaluated and developed so that all students have access to effective teachers and leaders. President Obama has also set in place initiatives (e.g. The American Recovery and Reinvestment Act) to ensure that all students in the United States have access to effective teachers and leaders, with better preparing, supporting, evaluating, and developing teachers across the country.

The middle and senior leadership team in a school may include a chairperson / head teacher for major programmes e.g. mathematics and curriculum coordinators to allow teaching staff to focus on teaching and related work.

LEADERSHIP PAY






Overview of the structure of pay

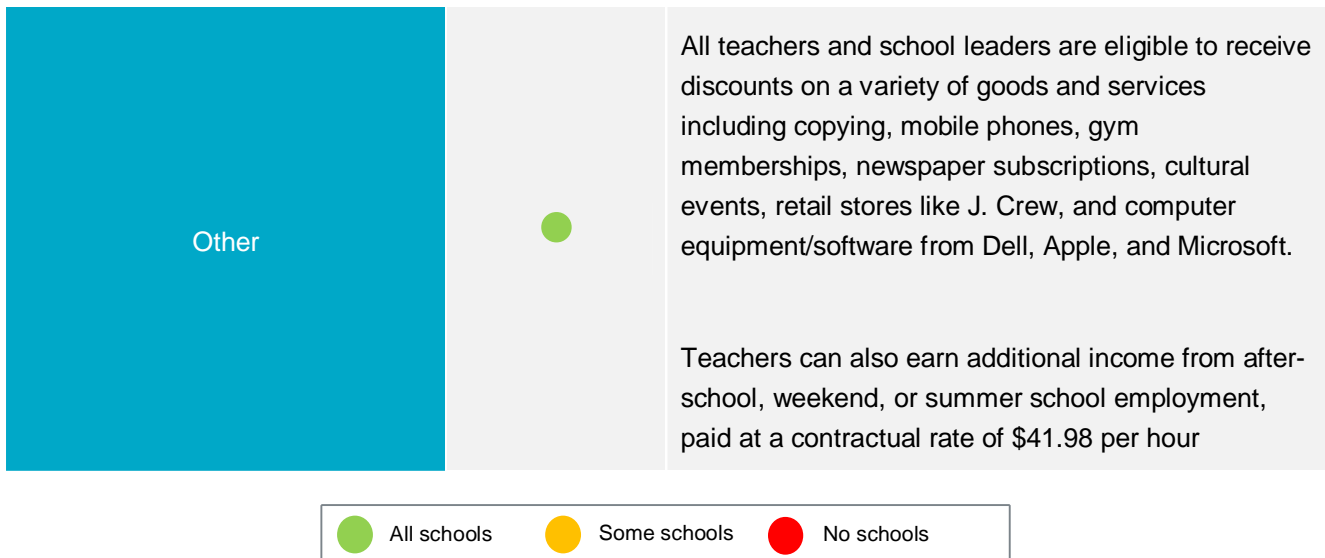
Both teachers and school administrators are unionized, and the teachers union is vocal and powerful. Salary scales are negotiated through collective bargaining and the union covers the entire New York City system. Basic salaries are set for teachers by taking into account prior teaching experience as well as undergraduate and graduate education. NYC teachers earn more based on experience, which translate to salary steps, and education above a bachelor's degree, which equate to salary differentials. The pay levels are set at a city-wide level. Twice each year, employees will automatically advance to the next salary step until they reach the salary step for five years' service from which they will move up according to the number of years' experience.

Leadership pay

School leaders are unionised and subject to collectively bargained pay scales between the School District Authority and the Council of Supervisors and Administrators. Leadership pay is set based on qualifications and experience, but also adds on allowances to account for school size, the performance of the school (and whether the school leader is eligible for individual performance increases (if they are judged to be in the upper quartile of principals or assistant principals). There are different pay scales for high schools, middle schools, primary schools and special needs schools. School leaders move up the pay scales based on number of years' experience and when they reach the top of the scale, receive extra payments for more than 22 years' service.

Components of pay other than base salary

Component of pay	Present?	Comments
Pension		Teachers become members of the Teachers' Retirement System (TRS), which provides an allowance in retirement funds based on years of service. Membership is mandatory and contributions are at a rate of 4.85% of gross salary. Teachers and school leaders can also contribute to the Tax-Deferred Annuity Programme (TDA), a voluntary savings plan, in order to augment retirement savings.
Travel allowance		Not typically available
Housing allowance		Not typically available
Extra responsibility allowances		Available to lead teachers (see below)
Healthcare		Teachers and leaders can select from a variety of health insurance plans and will also receive dental, vision, and prescription benefits through the United Federation of Teachers (UFT) Welfare Fund.



PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

All teachers and school leaders (those defined as providing instructional services or pupil personnel services) have their performance reviewed annually. This is the responsibility of the governing body of the district, but must comply with guidelines set by the NYC Department for Education. Evaluating teacher performance is a hot topic in the U.S. and teachers unions typically oppose linking pay to performance as it is viewed as potentially biased given their concerns about flawed evaluations and retribution.

Appraisal ratings, or the possible outcomes of appraisals are set by the state and teachers are rated highly effective, effective, developing and ineffective

The official criteria that teachers are assessed on (how their performance is measured) includes but is not always limited to an evaluation of the following:

- **Content knowledge;** the teacher shall demonstrate a thorough knowledge of the subject matter area and curriculum
- **Preparation;** the teacher shall demonstrate appropriate preparation employing the necessary pedagogical practices to support instruction
- **Instructional delivery;** the teacher shall demonstrate that the delivery of instruction results in active student involvement, appropriate teacher/student interaction and meaningful lesson plans resulting in student learning
- **Classroom management;** the teacher shall demonstrate classroom management skills supportive of diverse student learning needs which create an environment conducive to student learning
- **Student development;** the teacher shall demonstrate knowledge of student development, an understanding and appreciation of diversity and the regular application of developmentally appropriate instructional strategies for the benefit of all students
- **Student assessment;** the teacher shall demonstrate that he or she implements assessment techniques based on appropriate learning standards designed to measure students' progress in learning and that he or she successfully utilizes analysis of available student performance data (for example: State test results, student work, school-developed assessments, teacher-developed assessments, etc.) and other relevant information (for example: documented health or nutrition needs, or other student characteristics affecting learning) when providing instruction

- **Student growth;** the teacher shall demonstrate a positive change in student achievement for his or her students between at least two points in time as determined by the school district or BOCES, taking into consideration the unique abilities and/or disabilities of each student, including English language learners. For purposes of this subdivision, student achievement means a student's scores on State assessments for tested grades and subjects and other measures of student learning, including student scores on pre-tests and end-of-course tests, student performance on English language proficiency assessments and other measures of student achievement determined by the school district or BOCES to be rigorous and comparable across classrooms
- **Collaboration;** the teacher shall demonstrate that he or she develops effective collaborative relationships with students, parents or caregivers, as needed, and appropriate support personnel to meet the learning needs of students
- **Reflective and responsive practice;** the teacher shall demonstrate that practice is reviewed, effectively assessed and appropriate adjustments are made on a continuing basis

How is pay linked to performance?

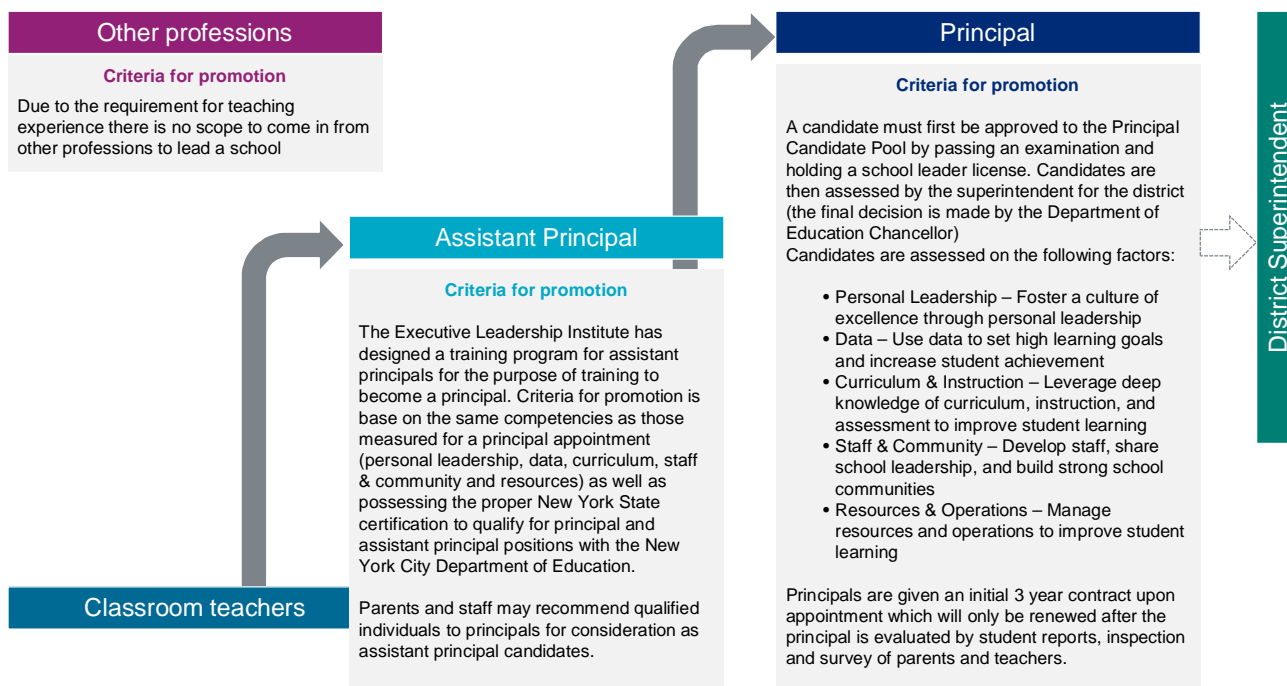
Teachers in selected high need schools who raise student achievement may be eligible for a performance bonus of up to \$3,000. Other than this, there are a few specific performance related pay programmes in New York State, for example in New Jersey, but the practice is certainly not system wide. These 'pilot' programmes are seen to be a way of testing the practice of performance pay before any broad roll out.

School leaders are eligible for a performance increase on their base salary if they are judged to be performing in the top quartile of their peers. This increase can be up to USD 25,000. The main points for measuring performance for the salary increase is outstanding student achievement and other criteria as decided by the superintendent and chancellor of the district.

CAREER PATHS

Candidates for principal and assistant principal positions must possess a certificate for eligibility for a supervisory placement. The New York City area has an abundance of college and university programmes that offer programmes that lead to certification as a school leader as well as several alternative certification programmes. The Hiring Manager (Superintendent for principal vacancies and principal for assistant principal vacancies) must follow prescribed regulations when recruiting for leadership positions. Once in the senior leadership team, school leaders in New York City may attend the Executive Leadership Institute and become a member of the Council of School Supervisors and Administrators to continue their professional development and receive support in the running of their school. Mentoring is a statutory requirement for all new assistant principals and principals. Assistant principals may also attend the Advanced Leadership Programme for Assistant Principals.

New Leaders is a national non-profit national organization that develops school leaders tracks its success based on student achievement. New Leaders provides professional development for successful teachers and assistant principals interested in improving their leadership skills. The aim is to create a pathway to school leadership for effective teachers and other top instructors who may not have considered the job.



The Lead Teacher Programme

The Lead Teacher Programme offers high performing teachers the opportunity to take on a leadership role either within their school or a new one. Lead Teachers spend 50% of their time in the classroom and the remaining 50% of their time providing professional development and support to teachers and it can be seen as a pathway to an assistant principal or principal position. They receive an allowance on top of their salary to account for the extra responsibility.

Eligibility Guidelines:

- Current NYC district tenured teachers, with at least 3 years of successful teaching experience
- Teachers with at least 1 year of successful adult leadership experience, including formal and informal roles
- Record of successfully impacting student achievement and working with high-need students
- Record of creating model classroom learning environments
- Proven ability to work cooperatively and effectively with colleagues
- Proven ability to create and nurture a professional learning community

Executive Principals

In the Executive Principal Programme, Principals are selected by the Chancellor and agree to a 3-year assignment to serve in high-needs schools. Those chosen to participate will receive a \$25,000 annual salary enhancement which is pensionable. At the conclusion of the 3-year assignment, the principal may seek to continue in his/her current assignment or accept a new one. Additional time as an Executive Principal may be offered in one-year terms renewable by mutual agreement. The principal may also opt to return to a regular assignment in the district (or borough for High Schools) in which s/he is assigned.

NON-PAY CONDITIONS – GENERAL

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours	The work day is 7 hours 15 minutes excluding lunch. No disclosure on whether school leaders are required to do any teaching. The collective agreement specifically states that the leadership team should not be required to do supervisory duties such as playground supervision	The number of daily periods of classroom instruction for a teacher should not exceed five. The rest of the teachers time is to be used for other duties such as planning and assessment
Professional development	Each school district and board of cooperative educational services (BOCES) must adopt a professional development plan. This is to ensure that all teachers and school leaders participate in substantial professional development in order that they remain current with their profession and meet the learning needs of their students	It is written into the Part 100 Regulations of the Commissioner of Education that teachers should complete 175 hours of professional development every five years
Annual leave entitlement	The annual leave entitlement is 27 days per year and is accrued at a rate of 2.25 days (2 days-1 hour-45 minutes) on the 16th day of each month while in active status	

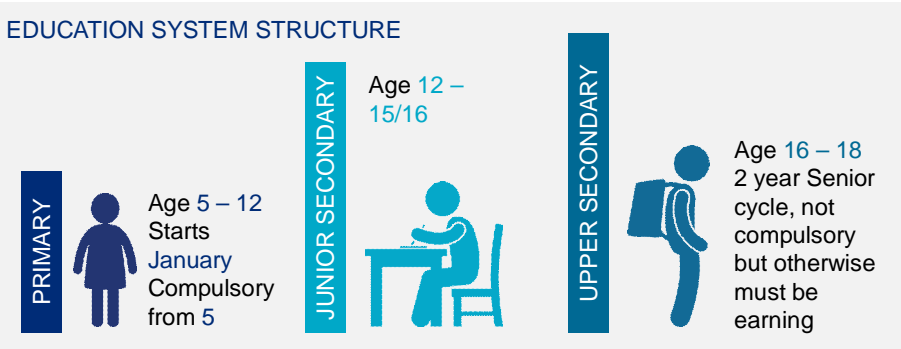
NON PAY CONDITIONS – SPECIFIC TASKS

There is no specific protection for teaching staff from performing certain administrative duties. There are, however, members of staff employed such as administrative staff, IT / AV specialists and classroom aides in the majority of schools and it is assumed that they would perform such duties.

DETAILED FINDINGS ASIA PACIFIC



COUNTRY OVERVIEW



GOVERNANCE AND REGULATION

? *Who sets education policy – central government or local authorities?*

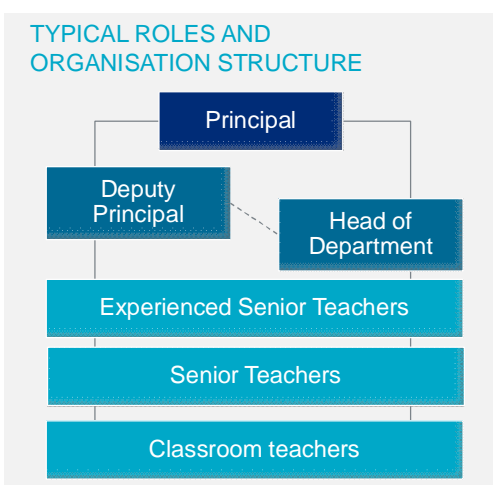
The Australian Government works with state and territory governments to fund school education, set education policy, and develop school curriculum however each state has autonomy to set their own policy

? *Who are head teachers accountable to?*

Head teachers report to a regional director of schools that acts as a representative from the state government education department

RECENT / PROPOSED CHANGES

- In 2013 The National Australian Teacher Performance and Development Framework was put in place. The Framework outlines the critical factors for creating a performance and development culture in schools, including essential elements that should be present in all Australian schools
- The Gonski reforms, if adopted, would mean a change in how schools are funded in Australia (see context section below)



CONTEXT

The Education system in Australia is currently undergoing significant change. While Australia remains a high achieving nation in education, overall performance has fallen in the last decade. It is proposed by some that the money to schools is distributed is not efficient, effective or fair.¹

To address these issues, the Federal Government wishes to introduce further major reforms accompanied by significant funding increases to both Independent and State schools under what is termed “the Gonski reforms”. The Gonski Review, which has led to the proposed reforms, was the most comprehensive investigation of the way schools are funded in almost 40 years. Headed by business leader David Gonski, the review found too many schools did not have the resources needed to give every child a high quality education. It proposed additional funding should be invested in local schools in ways that help students learn such as more individual attention, extra specialist teachers and additional training and support for teachers. The political challenge is that, constitutionally, the States and Territories are responsible for education and the Federal Government has not signed Gonski agreements with three: Western Australia, Queensland and the Northern Territory. It is proposed currently that the Gonski reforms will not be implemented unless all States agree. In addition to this, a Federal election has been called for September 2013 and if opposition was to win Government the situation may change, although they have said their policy supports the new funding arrangements.

¹As reported on the Gonski reforms website: <http://igiveagonski.com.au/what-s-gonski/>

Additionally, the debate on teacher performance has been running strongly in Australia for several years. The primary argument is that if teachers are measured on their performance, in terms of outcomes against national standards, then they should be rewarded financially. Opponents argue that the real issues are the need to improve training and more rigorous classroom discipline. On the other hand, the unions argue for reduced class sizes. Victoria is the only state where performance pay is being used across the board.

In terms of Governance, a couple of States, particularly Western Australia, have gone down the path of greater autonomy for (state-operated) school Principals, giving them the authority to employ and dismiss staff and giving them increased budget autonomy. The Western Australian government claims it is working well, and there seems to be some proof of that, but the concept is opposed by the unions. The Independent Public Schools concept, which gives Principals autonomy in HR, finance and facilities through a one line budget, now applies in most jurisdictions in varying forms and is well accepted. Queensland has 26 schools currently on these arrangements and expects to have 60 next year. While Principals can appoint staff, they cannot terminate but they now have more confidence in the system's willingness to act on poor performers. A recent OECD confirms greater autonomy being granted to schools in Australia with the results that schools make 49% of decisions around policy, curriculum, staffing, etc. with the state making 51%.²

There are some differences between the States and Territories in Australia but they are more differences of degree rather than substance. In that respect, we have chosen to specifically focus on Queensland, however any major differences between the States and Territories to do with the issues of school leaders and teacher pay and non-pay conditions will be outlined in the following pages.

² OECD (2013), Education Policy Outlook; Australia, OECD Publishing, Paris

LEADERSHIP PAY

Overview of the structure of pay in schools

In Australia, three salary scales are used for each of the three levels of teaching positions in a school:

- Classroom Teacher
- Department Head / Head of Curriculum
- Deputy Principal, Principal (single school and multi-school)

In Queensland, four year trained teachers are paid a salary increment after the completion of each subsequent twelve months satisfactory service (starting from band 2 step 1, see image below). Increments are then based on length of service, satisfactory performance and Continuing Professional Development (CPD).

Pay levels for each of the salary scales are set at a state level and pay can be taken as cash or a combination of cash and benefits through salary sacrifice (e.g. to buy work-related laptops, iPads, etc. before tax is taken). Pay levels are determined by the state government through enterprise bargaining process with industrial union groups. Salary increases vary across the country. Queensland and New South Wales currently locked in around 2-3% for next 2/3 years, whereas Western Australia and Victoria running at around 4% and Northern Territory 3%.

Leadership pay

The classification structure to which a school leader is assigned depends on the scope of the role and / or the band at which their school is placed in. For example, Deputy Principals would be assigned to a pay grade dependent on the size and location of the school and move through the pay points once every two years subject to satisfactory performance. If a school leader is promoted to a more senior position, their position on the salary scale will change to reflect the size and scope of the new role.





Banding, and therefore pay scales for employees at that school are worked out by using Mercer's Job Evaluation Management System. This takes into account location, size and complexity of the school (e.g. remoteness, Indigenous population, behaviour, socio/economic factors, resourcing issues, curriculum, community relations, staff management). Aboriginal Community Schools are generally one level higher than other factors would indicate.

A Senior Teacher will be paid approximately 75%-90% of those in the Department Head / Head of Curriculum level. A Deputy Principal will be paid at a similar level to a Senior Department Head / Head of Curriculum but have less teaching time and more administration responsibilities. A principal will be paid between 120% and 160% of a Senior Teacher's salary.

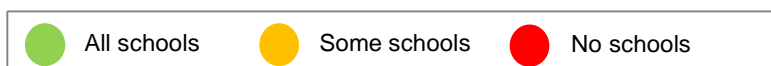
How does leadership pay change?

Employees in the Department Head / Head of Curriculum stream will progress through their classification structure (increasing the pay point level they are at) on the basis of one increment every two years.

Employees at the Deputy Principal level will also progress through their classification structure (increasing the pay point level they are at) on the basis of one increment every two years. On appointment to Principal level, employees will be assigned to a new salary grade and work their way through pay points after every two years' service. Employees in the top stream are also subject to a formal appraisal process that links to performance related pay.

Component of pay	Present?	Comments
Pension		All workers in Australia must be enrolled in a superannuation plan into which a minimum of 9.5% of base salary is paid in annually by the employer (if the current government is re-elected, will rise to 12.5% by 2019)
Travel allowance		Paid if a teacher is transferred by the department on the condition that they remain in the new location for a minimum of three years
Housing allowance		Locality allowance is a payment made to staff employed in a range of identified locations. The allowance is paid to offset the extra costs associated with living in remote localities and may vary based on location. Departmental housing allowance may also be provided in these relocation circumstances where there is a recognised shortage of private rental housing or to ensure that employees have access to a standard of housing that is commensurate with local community standards. Rent must be paid for departmental housing
Extra responsibility allowances		A fortnightly allowance (1% of fortnightly salary) is paid on top of salary for those teachers and school leaders working in schools for

		children with special educational needs and schools serving indigenous communities. Teachers who work in with children with special educational needs receive an additional allowance
Healthcare	●	Private healthcare cover is not provided
Other	●	Those in remote locations are also entitled to participate in the Remote Area Incentive Scheme (RAIS). Benefits are provided to compensate for the costs of travel and essential items and as an incentive to remain in rural and remote locations for longer than the minimum required service period. Incorporated within this scheme is entitlement to Compensation Benefit, Incentive Benefit, Special Incentive Benefit, additional Emergent Leave entitlement within a RAIS location, Identified Location Incentive and benefits in Identified Indigenous Communities



PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

There is a mandatory performance appraisal system in place in all schools in Australia. Usually appraisals are conducted annually but this may vary. The performance of School Principals and Executive Principals is managed by state education authorities whilst the performance of Deputy School Principals and other members of the teaching staff is evaluated by the School Principal.

While school principals' performance appraisal processes are undertaken by state-level jurisdictions, the National Professional Standard for Principals and the Australian Charter for Professional Learning of Teachers and School Leaders provide national guidance in the form of an online tool. This promotes specific measures of: general leadership; pedagogical leadership; organisation development; school climate; community relations; evaluation and accountability; resource management; interpersonal skills and school performance in relation to strategic plan.

Appraisal uses a variety of sources: dialogue with evaluators; school leader self-appraisal; school visit; student outcomes; parent surveys. For deputy school principal's dialogue with school principal; school leader self-appraisal and staff surveys are used.

Appraisals of teachers and school leaders result in a rating score and a professional development plan. Appraisal results may influence access to career development opportunities and permanent salary increment.

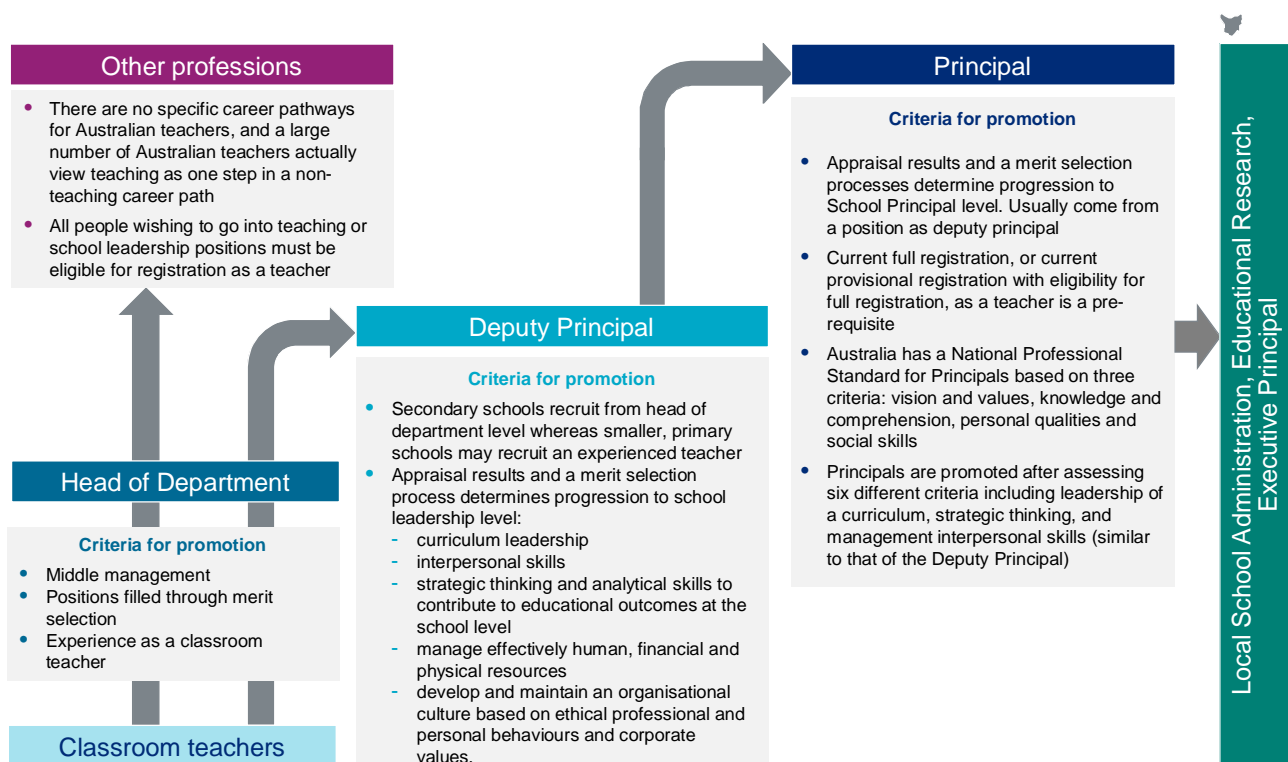
Under the Great Teachers = Great Results initiative (not currently in place but to be introduced) standards of school teachers and school leaders will be addressed using benchmarks and this will be used to identify high performing teachers leaders and principals. This process will be managed at a school level.

How is pay linked to performance?

Appraisals of teachers and school leaders may lead to promotion result in pay increases. Currently, 173 Principals are eligible to receive an annual bonus of AU\$20,000 subject to continually meeting performance criteria. This is paid annually and taxed – net AU\$10,000 – under the national Partnership Scheme. Progress against targets is published each year as part of the school’s annual report. The future of the scheme is not entirely clear but likely to continue and The Education Department says it is “too early” to measure effectiveness and it does not apply to any other teachers.

CAREER PATHS

Most of those who obtain promotional and school leadership positions are internal to the department. Panels involved in the selection process tend to favour recent relevant state school experience in Queensland. There have been attempts to widen the recruitment pool but largely school principals come from the teaching profession.



Teacher Type	Average Number of Years' Service
Principal	9.69
Deputy Principal	7.11
Head of Department	9.14
Classroom Teacher	2.83

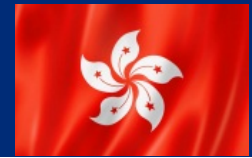
NON-PAY CONDITIONS – GENERAL

Non pay conditions are protected by Awards (Industrial Commission Awards have the force of law) and Public Service Directives.

Non-pay condition	Leadership positions (separated if necessary)	Classroom Teachers	Comments (including legality)
Typical teaching hours	Deputy Principals have 0.1 of a teaching load, Heads of Departments 0.6 and Principals 0.0	Standard duty time of a teacher is 25 hours per week, 8.30am-3.30pm. Lunch break of 45 minutes	Daily maximum is 7 hours and minimum is 3 hours for teachers
Professional development	Protected time and funding for CPD	Protected time and funding for CPD	Six days a year are “student free days” that are used for development
Planning and assessment time	-	Termed Non-Contact Time. 3.5 hours per week for secondary teachers and 2 hours a week for primary and special educational needs teachers	-
Management	Curriculum Coordination Time is allocated to primary and special educational needs schools	-	-
Required to cover for colleagues	-	-	-
Annual leave entitlement	Teachers and school leaders are entitled to full pay over the Easter, Winter and Spring Vacation (usually 10 working days) as well as the Summer Vacation (28 working days). Protected by law.		All school workers are also entitled to long service leave after completion of 10 years’ continuous service

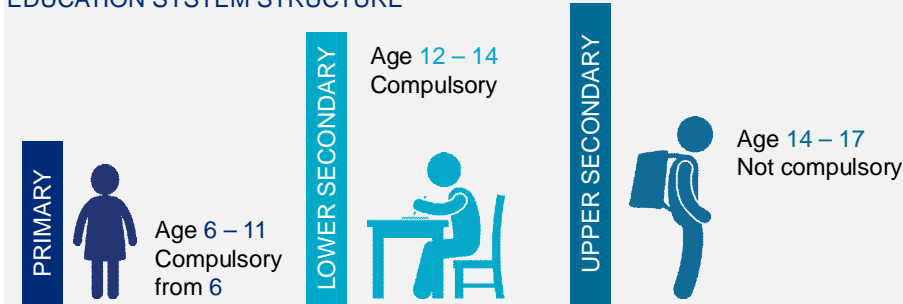
NON-PAY CONDITIONS – SPECIFIC TASKS

In Queensland, 22% of total staff comprises teacher aides and administrative support staff and, generally speaking, they would carry out administrative functions although there is no specific legislation.



COUNTRY OVERVIEW

EDUCATION SYSTEM STRUCTURE



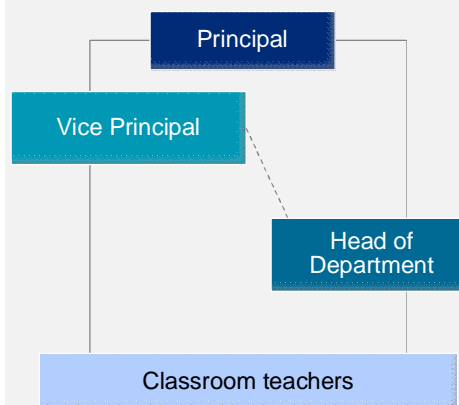
? Who sets education policy – central government or local authorities?

The Education Bureau oversees education policy in Hong Kong. Most schools have a School Management Committee to oversee operations of the school made up of community, teacher and parent representative and the principal of the school

RECENT / PROPOSED CHANGES

- The structure of the education system has recently changed at from a British style system to a system with primary, middle and upper schools
- The Hong Kong Principals' Institute was recently established which provides training for current and prospective school principals

TYPICAL ROLES AND ORGANISATION STRUCTURE



? Who are head teachers accountable to?

Head Teachers report initially to the Management Committee and Regional Education Offices (REOs)

CONTEXT

Hong Kong has made major changes to its education system since 1997. As part of these reforms, the structure of the system has changed from a British style system to a lower secondary (3 years), upper secondary (3 years) and degree (4 years) system. In addition, the policy of 'School Based Management' represents the decentralization of decision-making from the Education Bureau (EDB) to schools regarding personnel procedures, financial matters and the design and delivery of curriculum. Schools must still satisfy the government regulatory requirements and the Codes of Aid (COA) but with the implementation of school-based management, management committee as the employer of all school staff, exercises greater autonomy and responsibilities in personnel matters.

The schools provided by the Hong Kong Education Department (EDB – Education Bureau) can be divided into three main groups: government schools; subsidized (aided) schools, which are usually administered by charitable bodies; and private schools run by different organizations where admission is more often decided by academic merit (schools such as DBC and DGS are example of these types of schools). This study will focus on all types of non-independent schools.

School structure in terms of roles and leadership team is prescribed by the EDB. A table with the number of classes contained within a school details what rank the principal should be at, whether there should be a deputy principal and how many senior teachers should be employed.

LEADERSHIP PAY

Overview of the structure of pay in schools

Throughout their careers, teachers' salaries reflect their level of experience and education as they move up set salary scales. Where a teacher or school leader is placed on a salary scale is assessed by school administrators before being approved by the Education Bureau (EDB).






There are different pay scales in Hong Kong for each type of school and a separate pay scale for special educational needs schools. Those salary scales are further split into those for 'basic rank' teachers and those for 'promotion rank' teachers.

Teachers' salaries are commensurate with those of other professional positions in Hong Kong. Those teachers and leaders who are willing and capable of taking up extra teaching or non-teaching duties are paid extra allowances.

Leadership pay

Teachers directly appointed to promotion ranks, the leadership section of the Master pay scale, will be remunerated at the minimum point of the appropriate scale. The appropriate scale is determined by the rank of leader they are, which is determined by school size. They will then move up the scale to higher pay points dependent on and additional qualifications they receive and their experience.

Elements of pay other than base salary and allowances

Component of pay	Present?	Comments
Pension		All residents in Hong Kong receive employer contributions into the Central Provident Fund equivalent to 5% of base salary
Travel allowance		Not normally provided
Housing allowance		Not normally provided
Extra responsibility allowances		Provided if a teacher takes on extra responsibility e.g. special educational needs teaching in a mainstream school
Healthcare		Not normally provided



All schools



Some schools



No schools

PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

Schools are required to have a formal performance management system in place. In consultation with staff, schools aim to develop a fair and open appraisal system that serves to evaluate the strengths and weaknesses of staff and identify corresponding professional development needs. This can take on the form of an accountability model (usually using a rank score and directly linking to promotion) or a developmental

model (using descriptions or performance rather than rank) or a combination of both. The appraisal of the school head is conducted by the School Management Committee and the appraisal of the vice-principal will be conducted by the principal. However, it is not necessary for the appraiser to be of a senior rank. If the objective of the appraisal is to improve teaching methods and skills, schools may allow teachers to pair up voluntarily to observe each other's lessons and be the appraisers of their counterparts.

The appraisal should focus on the following items:

- Teaching and teaching-related duties
- Non-teaching duties
- Professional and personal competence

Each teacher should have a job description outlining his/her responsibilities and scope of work. This can serve as a reference in deciding the areas of appraisal.

Performance is measured against specific targets set at the beginning of the year by using lesson observation, self-appraisal, lesson plans, portfolios, and student achievement or student surveys.

How is pay linked to performance?

Because salary levels in the education system are relatively rigid, principals use promotion as the primary incentive to ensure teacher performance. It is up to the school to decide whether to build a tight or loose connection with the performance management process and pay. Some schools may rely mainly on the performance appraisal results for staff promotion exercises and disciplinary procedures while others use them as a reference only for the two purposes. However, the system is designed to enable better reward for top performing teachers.

CAREER PATHS

Teachers' career prospects depend on which pathway into teaching they take. A teacher who holds a teacher's certificate or the status of a qualified teacher based on their performance on the Non-Graduate Teacher Qualifications Assessment may be promoted to the level of Assistant Principal once he or she possesses the appropriate experience (typically several years of teaching followed by several years of experience as a senior teacher) and any necessary additional training.

In addition to traditional career paths, teachers may temporarily transfer to the EDB, and likewise, EDB employees may take temporary non-teaching positions in schools.

Appointment of a school principal or a teacher on a promotion rank (senior teacher / middle management) is first approved by the school's management committee and then by the EDB.

NON-PAY CONDITIONS – GENERAL

In all letters of appointment for teachers and school leaders the following are key elements:

- Salary scale, incremental date and payment of salary
- Description of duties
- Staff benefits such as provident fund and leave provisions
- Absence from duties
- Standards of professional conduct/ code of conduct
- Policy on staff performance management
- Future promotion prospects
- Other employment conditions, including language proficiency requirement for English/ Putonghua teachers, degree and teacher training qualifications for Chinese and English Language teachers and Certification for Principals for school principals

Non-pay condition	Leadership positions	Classroom Teachers	Comments
Typical teaching hours	Information not found but may exist		
Professional development	There are no hard and fast requirements for professional development	The Education Bureau (EDB) encourages teachers to improve their practice through “professional development activities” for an official target of 50 hours per year	The government is now in the process of imposing a salary cap on teachers who refuse to undergo government-mandated professional training in their first five years of service
Planning and assessment time	Information not found but may exist		
Management			
Required to cover for colleagues			
Annual leave entitlement	May enjoy school holidays subject to there being no operational needs		

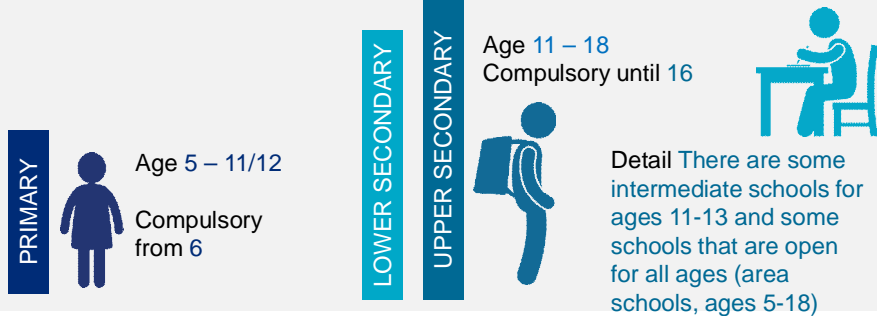
NON-PAY CONDITIONS – SPECIFIC TASKS

Specific protection for teachers from doing specific administrative duties was not found but may exist.



COUNTRY OVERVIEW

EDUCATION SYSTEM STRUCTURE



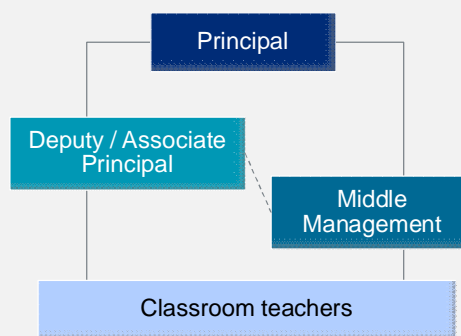
? Who sets education policy?

The government sets education policy and the Ministry of Education develops it. The Ministry oversees the education system, develops curriculum and assessment standards for students and teachers, intervenes in instances of school failure, provides funding and leads cross-government initiatives. Schools are governed by a Board who are largely autonomous

RECENT / PROPOSED CHANGES

- Primary principals have had a new career structure introduced. This is based on professional criteria describing the progression of skills, knowledge and experience a principal brings to their leadership at different stages of their principalship, and an associated allowance. The implementation of the career structure replaces the Experience Payment

TYPICAL ROLES AND ORGANISATION STRUCTURE



? Who are head teachers accountable to?

The elected Board of Trustees of a school

CONTEXT

New Zealand is identified by the OECD as having one of the most autonomous education systems in the world. Autonomy came with the education reforms of 1989, when the shift of employer responsibility was made from the Ministry of Education (MoE) to Boards of Trustees in a programme of reform known as “Tomorrow’s Schools”. The intention of these reforms was that control of schools should be in the hands of the communities that they serve. Boards of Trustees were legally delegated the responsibility to recruit, manage and dismiss staff in their schools, including the Principal. The MoE provides funding to schools and negotiates collective employment agreements which cover teaching and leadership roles. While there are national standards of education, and a curriculum that schools must deliver (the “what” is mandated), the “how” is left in the hands of the schools.

The terms of employment for most teachers and leader are documented in the various collective employment agreements. The Secretary of the Ministry of Education negotiates all collective employment agreements with the unions. All teachers and principals who are members of the union are parties to this agreement. Teachers and principals who choose not to be members of the union, will for the most part be on individual employment agreements, the terms of which will be the same as those in the collective agreement. Should schools wish to negotiate an individual employment agreement with a staff member, they will be required to

get the concurrence of the Secretary. Only a small proportion of staff are employed on an individual agreement of this nature. Employment agreements are negotiated nationally.

There is no “typical” structure to schools in New Zealand. It is up to individual schools to decide what structure best enables them to serve their students and community. While schools will be led by Principals, the structure of the teaching staff may vary greatly with some schools being very hierarchical, and others not. Secondary schools tend to be structured along pedagogical lines, according to the subjects they offer (e.g. with Department Heads for each subject area - a Head of Science, English etc. reporting to the Principal) with primary schools more commonly structured according to the level of the students (with Heads of Junior, Middle and Senior syndicates reporting to the Principal). Whether a school has a Deputy Principal, Associate Principal, etc. will depend on the discretion of the Board of Trustees.

LEADERSHIP PAY

Overview of the structure of pay in schools

Pay for teachers in New Zealand follows salary scales that are set by the Ministry for Education. Within each salary scale, salary steps are used. The point at which a Teacher enters the salary scale depends on their qualifications (see table below). The primary, secondary and area Teachers’ Collective Agreements all have different salary scales meaning there is a difference in pay for primary schools (lowest levels of pay), area schools (middle level of pay) and secondary schools (highest levels of pay) although the structure is the same.

Salary Scale	Percentage of Teachers	National Qualification Level	Example of Qualification
One	10%	5	Diploma in professional cookery
Two	3%	6	Advanced Trades Certificates
Three	25%	7	Bachelor of Teaching
Four	44%	8	Honours Degree
Five	4%	9/10	Masters Degree / PhD

Allowances are paid in addition to salary and are made up of units to reward management responsibilities, role-related responsibilities and other incentives. Units can be awarded for the purposes of management, responsibility, recruitment, retention and/or reward. The employer (school boards of trustees) consults with its teachers in determining a policy to decide the use of units at its school. In addition there are allowances for teachers in some schools that are geographically isolated or hard to staff, and management allowances which differ according to the sector.

For all teachers in New Zealand, apart from the type of school (which determines the salary scale) and allowances granted, pay level is dependent on qualifications and experience.

Most teachers move up one salary step each year until they reach the maximum salary step for their qualification. Across the base salary scales for primary, secondary and area teachers, the smallest increment

is 2.94%; the largest is 10.71%. Over 99% of eligible teachers (teachers who have not reached their top step in the base salary scale) get an increment each year once they have been assessed against the performance standards in their employment agreement (by their board of trustees or principal). Changes to salary bands are negotiated by unions and the government and usually reflect inflation.

Within New Zealand, teacher's pay compares favourably to other professions (average teacher pay plus allowances is NZD 71,000 p/a which is well in excess of the national average salary which is around NZD 57,000 p/a). New graduate salaries are NZD 47,000 which compares favourably to other professions.

The most significant change in teacher pay has been the shift to a base scale plus units approach as described above. This change was made in the 1990's and provides schools with more flexibility to structure the school in a way which best meets the individual school's needs. Prior to this approach, schools were allocated and funded for particular roles.

Leadership pay

Whilst middle and senior managers of a school will be paid on the teacher salary scale, with additional units of allowances for extra responsibilities, Principals' remuneration is separate. A principal's remuneration includes the U Grade rate (see table below), a staffing funding component, the decile payment (where applicable), the payment for Leadership and Realising Youth Potential (where applicable), the High Priority Principals' Allowance (where applicable) and the Secondary Principals' Career Allowance (where applicable). The Board of Trustees also has the option of awarding extra allowance units if appropriate.

There is no formal link between the pay of a school leader and others in a school, other than that articulated in the collective employment agreements. It is therefore a matter of negotiation between the Ministry and the Unions, and then implemented by the Boards of Trustees depending on the size and needs of the school.

Principal pay scale, secondary schools (effective 8 Apr 2014)

U Grade	Number of pupils	Rate (NZD 2012)
1	1-50	\$76,177
2	51-100	\$84,538
...
15	2201-2400	\$144,219
16	2401+	\$147,687







The staffing-based component is calculated according to whether the school has less than 13 staff or less (NZD 709 for each teacher + NZD 2,760) or more than 13 staff (NZD 140 per teacher + NZD 10,545).




From 10 November 2014 Principals will also receive an allowance of up to NZD 9,500 if they reach the top of the Principal career structure (a 'Leading Principal'), as assessed by their performance appraisal.

How does leadership pay change?

Middle and senior leaders of a school will move up salary scales dependent on qualifications and experience. They can also receive extra allowances if they have additional responsibilities or simply to reward and retain high performers. Principal pay will change dependent on the number of pupils and staff they have in their school. Like middle and senior managers, Principals can also be awarded extra allowances if the Board of Trustees feels it is appropriate.

Elements of pay other than base salary and allowances

Component of pay	Present?	Comments
Pension		<p>Teachers may choose to join KiwiSaver and receive employer contributions in accordance with the scheme rules (currently set at 3% of gross earnings)</p> <p>Separately, teachers may be members of a number of schemes that are now closed to new members. These include:</p> <ul style="list-style-type: none"> Teachers Retirement Savings Scheme and State Sector Retirement Savings Scheme – the employer matches a teacher’s contribution up to 3% of the gross salary. Teachers can elect to make voluntary contributions in excess of their subsidised contribution The Government Superannuation Fund – the employer contribution is either 10.7% or 7% of the gross salary National Provident Fund – the employer matches the teacher’s contribution up to 3% of the gross salary.
Travel allowance		Reimbursement for travel may be made in some circumstances. In some situations, where a teacher is being promoted and is transferring to a role outside of their home district, the Ministry will make some contribution towards transfers and removals
Housing allowance		Although some schools may own a house, where this is provided to a teacher or principal, they must pay market rent for this
Extra responsibility allowances		Yes, all teachers and school leaders may receive allowances for extra responsibility (see pay section above)
Healthcare		Not provided
Other		For example, teachers in the Chatham Islands (a remote NZ island with a very small community) are provided with some additional allowances as an incentive to take those roles. It would not be possible to recruit or retain in that location without those additional benefits.

 All schools
  Some schools
  No schools

PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

Teacher and school leader performance appraisals are mandatory and require that professional standards, as set by the Secretary for Education, are assessed. Responsibility for staff performance management is usually delegated to the principal. School leaders therefore have a pivotal role in establishing the school conditions for teacher appraisal. The NZTC (New Zealand Teachers Council) has regulatory and professional leadership functions in relation to teacher performance management.

The components of an appraisal policy as mandated include:

- The appraisal must be conducted at least once within a 12-month period
- Specifying the person/s responsible for the implementation of the appraisal policy
- Specifying the process
- Including a statement on confidentiality
- Specifying how any dispute will be dealt with
- Results in an annual appraisal report
- A professional development orientation

Performance is defined by each individual school and Board of Trustees but has a link to the Professional Standards documents, which is separated for primary, secondary and area schools. For the Principal, these include measures of professional leadership, strategic management, staff management, relationship management and finance / asset management. Suggested guidelines by the New Zealand School Trustees Association (NZSTA) state that each objective could be rated using a four point scale: exceeds job requirements; meets job requirements; room for improvement and unsatisfactory.

Quality of teaching is monitored by the Education Review Office (ERO). However ERO does not have the same powers as Ofsted (e.g. it cannot close a school). These powers are retained by the Ministry and the Board of Trustees.

How is pay linked to performance?

There is no national performance related pay for teachers in New Zealand. However, payments for recruitment, retention and responsibility (3R payments) can be made to teachers and leaders, which can be seen as a link between pay and performance. Boards may make these payments from their operational funding to individual teachers, with the objective of enhancing educational outcomes. The 3R payment is NZD 2,750 for primary and up to the value of NZD 4,000 for area and secondary teachers. Teachers may be allocated more than one payment. In addition, the Board has the discretion to remunerate over and above the base salary through the “concurrency” of the MoE. The employee unions have traditionally been opposed to performance based pay, as they are strongly in favour of an egalitarian approach which provides predictable outcomes for their members, and where there is minimum discretion built into pay decisions.

CAREER PATHS

Under the Education Act, all teachers must have (or be eligible) for registration with the Teachers Council. Therefore, all school leaders have a teaching background. Any leaders recruited from outside the profession will have previously been a teacher.

There is not one defined career path for school leaders. Given the diversity of schools in NZ, the career path for a leader may be varied. It is up to the Board of Trustees to decide whether the career and experience of a

candidate for a leadership role is suitable for that role. While all teachers (including Principals) are required to be registered teachers, there are no defined requirements for leaders around qualifications and experience. For example, a teacher may progress into a Principal role (of a small school) relatively early in their career, then move from there into a Deputy Principal role (of a larger school, which may be a career progression) and so on. Career progression may also be measured in terms of other attributes such as relevant experience, philosophical outlook and experience e.g. a teacher in a Maori immersion school (where only Maori language is spoken) may move into a Maori language teaching role in an English speaking school, etc.

There are not many private schools in NZ (in comparison to the size of the public school sector) nor are those schools large. This means that the proportion of teachers moving from the private to public systems is small. Turnover and churn in the NZ education system currently is low (which is consistent with other sectors and a symptom of the economic environment where there is uncertainty about job and financial security).

There is on-going conversation in the sector about career pathways for teachers and principals and a new career structure for Principals is currently being introduced:

Stage	Service criteria	Professional criteria
1 – Initial principalship	Minimum of 3 years continuous service as a principal in a New Zealand State or State Integrated Secondary School	<ul style="list-style-type: none"> • Meeting the requirements of the performance review/agreement (as in clause 4.1 and 4.2) • Completion of the First Time Principals' Programme (or similar) • Participation in a professional learning and development plan which may involve (but is not limited to) mentoring, professional supervision, study or a professional learning and development project aligned with school goals.
2 – Experienced principal	Minimum of 6 years continuous service as a principal in a New Zealand State or State Integrated Secondary School	<ul style="list-style-type: none"> • Meeting the requirements of the performance review/agreement (as in clause 4.1 and 4.2) • Participation in a professional learning and development plan that demonstrates professional growth, including pedagogical leadership. This could be through further tertiary study/qualifications, a sabbatical project or professional learning project in own school context.
3 – Leading principal	Minimum of 9 years continuous service as a principal in a New Zealand State or State Integrated Secondary School	<ul style="list-style-type: none"> • Meeting the requirements of the experience principal (as above) • Contribution to or leadership of a learning or professional community that contributes to the wider education sector

NON-PAY CONDITIONS – GENERAL

Part of the collective agreements between the Ministry of Education and individual teachers define non-pay conditions such as maximum teaching hours and annual leave. There is flexibility for each school to decide their policy within this framework.

Non-pay condition	Leadership positions	Classroom Teachers
Typical teaching hours		For secondary teachers, there is a maximum number of contact hours (20 hours out of a total of 25 timetabled student contact hours). For primary teachers, no such restriction exists however the contract indicates the following: "The normal hours of work for employees should as far as practicable however not exceed 40 hours per week Monday to Friday"
Professional development		Protected CPD time varies from region to region. Primary teachers receive one hour of "Classroom Release Time" per week (or ten hours per term). This is typically used for professional development purposes. The collective agreements allow Boards to require teachers to attend school on a number of days when the school is not open for instruction, for the purposes of professional development. Schools also use "teacher only days" to provide for professional development
Planning and assessment time		The remaining five non-contact hours can be used for planning, administration, professional development or other activities. Some schools allow for more than five hours non-contact time. This is at the discretion of the school
Management		
Required to cover for colleagues	This will vary school by school. Most schools tend to use relief teachers to cover absences and will have a ready network of relief teachers to draw on for that purpose. Costs associated with relief teachers are most often funded from the operational budget of the school, unless a teacher is away for more than 7 days, when the school can then access the central relief teachers scheme provided by the Ministry	
Annual leave entitlement	Principals are entitled to 25 days paid annual leave per annum. Annual leave shall normally be taken when the school is closed for instruction. Such leave should be taken at a time or times agreed with the Board	Holidays days are calculated at the rate of 30% of the school days in the year (comprises all paid service including weekends and statutory holidays). There is some flexibility in primary schools for the Boards to decide on annual leave whereas the secondary school agreements are more prescriptive

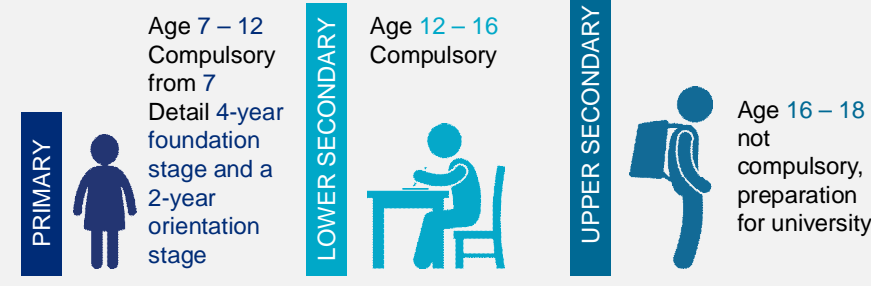
NON-PAY CONDITIONS – SPECIFIC TASKS

There is no specific protection and will depend on a number of factors: the resourcing available at the school, the inclination of the particular teacher and ultimately whether the Board protects teachers at the school or not.



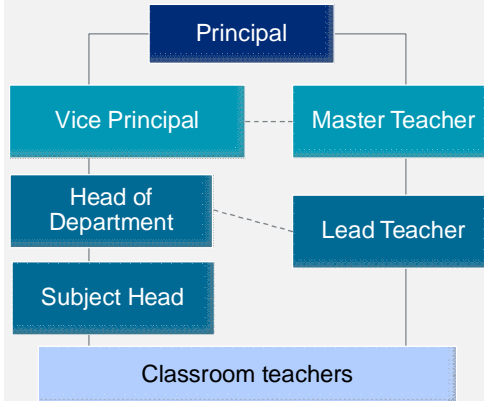
COUNTRY OVERVIEW

EDUCATION SYSTEM STRUCTURE



RECENT / PROPOSED CHANGES

TYPICAL ROLES AND ORGANISATION STRUCTURE



? *Who sets education policy – central government or local authorities?*

The Ministry of Education (MoE) determines all national education goals and curriculum guidelines, and is responsible for hiring teachers directly from the National Institute of Education. Certain top performing schools are designated as “autonomous.”

? *Who are head teachers accountable to?*

The Cluster Head for their local school area who reports to the MoE

CONTEXT

The Singapore government has overhauled the education system in the last 50 years from a country with low rates of literacy to one of the highest performing education systems in the world as ranked by OECD.

Teaching and working in the education sector in Singapore is well respected – Singapore recruits its teachers from the top third of high school graduates which ensures a high-calibre cohort each year. Only one out of eight applicants for admission to their teacher education programmes is accepted, and only after a gruelling application process. During their training, teacher candidates receive a monthly stipend equivalent to 60% of a starting teacher salary, and their tuition is covered by the Ministry of Education. However, once they have completed training, teachers must commit to three full years on the job.

Teachers and school leaders in Singapore are well paid and Singapore also has a system of generous bonuses that boost teachers’ salaries by tens of thousands over the course of their careers. Average salaries are equivalent to that of engineers and accountants in the civil service.

Currently, most schools have a group of executive and administrative staff who perform critical manpower, finance and other corporate functions in schools. These members of staff are headed by Administration Managers and Operation Managers and support the Principal to ensure that schools operate smoothly and effectively.

LEADERSHIP PAY

Overview of the structure of pay in schools

Teacher salaries are based on teaching experiences and academic qualifications however, salary increases due to promotion are determined on competence and engagement in the work of the school. Pay rates are set by the Ministry of Education.

Initially, teachers are paid a monthly salary which depends on the result of their teaching degree (pass: SGD 2,880, pass with merit: SGD 3,010, honours: SGD 3,160 – SGD 3,310). There are only four steps along the classroom teacher career ladder. On top of base salary, all teachers are entitled to a variable bonus dependent on performance, and an Annual Variable Component (AVC) at the end of the year. The quantum of the AVC varies from year to year depending on Singapore's economic performance.

In addition, the CONNECT Plan remunerates teachers on top of their salaries and bonuses. A sum of SGD 3,200 to SGD 8,320 (depending on number of years an individual has taught for) will be set aside yearly for each teacher. At various defined points a teacher's career—with intervals of three to five years—payments will be made to the teacher in the range of SGD 15,200 to SGD 36,100. This is seen as a retention tool and ensures that the attrition rate for teachers in Singapore is kept low – currently at around 2.4%.




Leadership pay




A teacher moves to the senior teacher salary schedule based on merit - defined as good performance as measured in the performance appraisal process and reliable service. Excellent and experienced education officers can be promoted to the senior education officer (SEO) grades where there are the SEO1, SEO1A1 (master teacher), SEO1A2 (school leader). Exceptional senior education officers who are usually superb school leaders or leaders in the ministry can rise to the super-scale grades starting from H, G, F and so on. The highest ranking education officer is the Director-General of Education who was recently promoted to super-scale grade C.

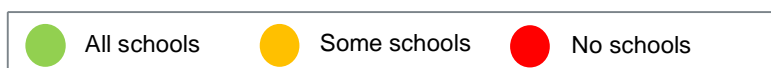
How does leadership pay change?

Teachers' and leaders' pay depends in part on where they are on the various career ladders available to them (leader path, master teacher or specialist career path; more information in section below). Promotion up these career ladders depends entirely on demonstrated performance and demonstrated potential as well as participation on continuing professional development (CPD) courses such as the school leadership academy course for future principals. As progression in career and salary depends predominantly on performance appraisal, the direct reporting officer and the principal will have sign off on promotions for school staff, and the cluster head of schools / Ministry of Education for any promotion of a senior leader.

Elements of pay other than base salary and allowances

Component of pay	Present?	Comments
Pension		CPF Contribution is only for teachers who are Singapore Citizens/Singapore Permanent Residents which amounts to around 13% of gross monthly salary (however contribution rates differ depending on the age of the employee)
Travel allowance		Not typically provided
Housing allowance		Not typically provided

Extra responsibility allowances		Provided
Healthcare		Medical benefits provided under the Medisave-cum-Subsidised Outpatient (MSO) Scheme. Dental Benefits amounting to 50% of outpatient dental expenditure per visit will be subsidised subject to a maximum of \$70 per annum
Other		Use of Government chalets at low rates: teachers can apply to stay at the government holiday chalets at Loyang and Changi in Singapore, and at Fraser's Hill and Cameron Highlands in Malaysia



PERFORMANCE MANAGEMENT AND PERFORMANCE RELATED PAY

How is performance managed?

All teachers and leaders in Singapore take part in an annual appraisal process in which teachers are evaluated in key areas, including work in the classroom and the contributions they make to the school and community. This is termed the Enhanced Performance Management System (EPMS). The outcomes of the performance appraisal include financial bonuses, awards and recognition at national level.

The Performance Management Process involves the three main phases of planning, coaching and evaluation. The appraisal process is led by the reporting officer who, with the education officer (the employee being appraised), come to a joint understanding of the goals that need to be attained on an individual basis. If the education officer is a teacher, the reporting officer will be the head of department. If the education officer being evaluated is a head of department, the reporting officer will be the vice-principal. If the education officer is a vice principal or principal, the reporting officer will be the cluster superintendent.

Performance targets are separated into two key areas (the “what” and the “how” of performance). Under section one which focuses on key result areas, the targets can fall in five major categories:

- Holistic development of students through quality learning, pastoral care and well-being, and curricular activities
- Contribution to school
- Collaboration with parents
- Professional developments
- Other targets not within the first four areas

Section two consists of the teaching competency model, with its specific competencies, the targets and ratings for each level of the particular career path. Teachers at higher stages of their career are expected to perform at higher levels, for example, a Master Teacher is expected to perform at levels 4 or 5 whereas a Senior Teacher is expected to perform at level 3. The teaching competency model encompasses one core competency and four broad competency clusters. The core competency is “Nurturing the Whole Child”. The other four major competency clusters are “Cultivating Knowledge”, “Winning Hearts and Minds”, “Working with Others” and “Knowing Self and Others”. There are four points on rating scale, ranging from “Not Observed” and “Developing” to “Competent” and “Exceeding”.

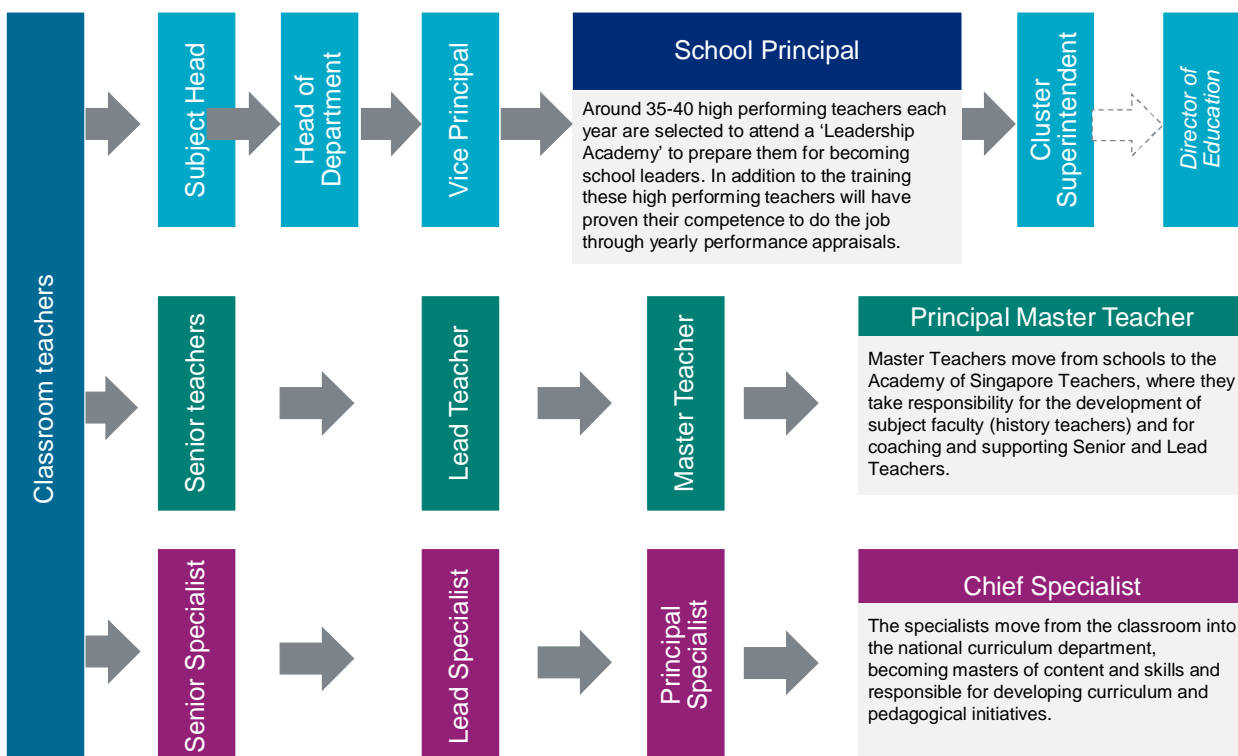
How is pay linked to performance?

Performance bonuses are based on Singapore's teacher appraisal system and paid annually based on the outcome of the teacher / leader's performance appraisal. This typically amounts to 10%-30% of base salary for both groups, with the amount varying depending on performance (average to outstanding performers). Teachers can also be rewarded with a sum ranging from \$3,000 to \$10,000, depending on staff strength for outstanding team-based contributions to their school. The individual outstanding contribution award is S\$1,000. No information could be found to confirm whether awards are available for middle / senior leaders.

CAREER PATHS

There are three directions a teaching career can take in Singapore as defined in the "Education Service Professional Development and Career Plan" (Edu-Pac). Teachers will be assessed early into their careers and put on the teaching track, the leadership track or the specialist track. In the teaching track, teachers work their way up to becoming Principal Master Teachers. In the leadership track, teachers can be promoted from a leadership position within the school all the way up to the position of Director-General of Education. In the specialist track, teachers are focused on research and teaching policy, with the highest level position being Chief Specialist. The career structure is flexible and allows officers to move across different tracks, so long as they meet the criteria and requirements of the job on the track they wish to enter.

Training on a particular career path often involves promotion to department head at a young age, recruitment to several academic and administrative committees, stints at the Ministry of Education and a six-month executive leadership course at the National Institute of Education (NIE). There is no scope to come from other professions into a principal or teaching role however most schools have an executive and administration function, and in some cases a vice principal (administration) would look after the non-pedagogical side of the school and report directly to the principal.



NON-PAY CONDITIONS – GENERAL

Non-pay condition	Leadership positions	Classroom Teachers	Comments
Typical teaching hours	Information not found but may exist		
Professional development	CPD is supported and encouraged - there are a variety of professional development opportunities for teachers including the Skilful Teacher Enhanced Mentoring Programme, Teacher Work Attachment and teacher-led workshops. All teachers are entitled to 100 hours of CPD annually which can occur during school hours with resources provided for relief teachers. Teachers could also claim up to S\$400 or S\$700 per year, depending on their years in service, for learning and development related expenses		
Planning and assessment time	Information not found but may exist		
Management			
Required to cover for colleagues			
Annual leave entitlement	The school year is from January to December each year. There is a total of 12 weeks of school holidays a year. Teachers may be called up for duty during the school vacation but normally are not required to work		

NON-PAY CONDITIONS – SPECIFIC TASKS

Specific protection for teachers from specific administrative duties was not found but may exist.

APPENDICES

APPENDIX A: SURVEY QUESTIONS

Pay and career paths

- ? What career path would be typical for teachers and leaders?
 - Typical number of years' service
 - Qualifications required
 - Experience required / typical experience
 - Recruitment pool (private or state)
- ? Do you recruit school leaders from outside the teaching profession?
- ? How is the level of pay determined for teachers and school leaders? (Include information relating to factors used e.g. number of pupils, geographic location, experience, pupil background, previous performance, grades, etc.)
- ? Who determines pay levels for teachers and leaders – governors, local authorities or central government?
- ? Who determines pay increases – governors, local authorities, central government, or school leadership team?
- ? What pension arrangements are provided?
- ? What non-cash benefits are provided?
 - Healthcare
 - Travel / car allowance
 - Housing allowance
 - Other
- ? Is there a performance appraisal process?

If yes:

 - How is performance defined and measured?
 - If performance targets are set, are these at school, leadership team or individual level?
 - Is the performance appraisal process linked to changes in pay?
 - Who manages the performance appraisal process?
- ? Is there performance related pay?

If yes:

 - What conditions are applied?
 - Is this pay consolidated into the annual salary or paid as a one-off lump sum?
 - If performance related pay is used, does this increase the effectiveness of the school leaders?

If no:

- What arrangements are there for pay progression and recognising high performance?
- ? How does the pay for leaders link to the pay of other teachers in the organisation?
- ? How would pay transition for a teacher being promoted to a leadership position?
- ? What are salary levels relative to classroom teaching positions?
- ? What regulatory bodies is this role accountable to? E.g. UK teachers are regulated by Ofsted
- ? Have the pay arrangements changed in the last 5-10 years? If yes - have the changes improved the effectiveness of school leaders?

Non-pay conditions

- ? Are there set limits on working hours for classroom teachers and school leaders?
 - If yes, what are the limits?
- ? Is there any time dedicated to professional development for classroom teachers and school leaders?
 - If yes, how many hours / days per year?
 - Is this provision protected by law?
- ? Are teachers / leaders routinely performing administrative tasks such as bulk photo copying, producing standard letters, making classroom displays, etc.?
- ? Are there any tasks that teachers / leaders are protected from routinely undertaking?
- ? Do classroom teachers have any protected time for:
 - Planning
 - Assessment
 - Training
 - Other protected time
 - If yes, is this protected time a legal requirement?
 - Do school leaders also have protected time?
- ? Are school leaders required on occasion to cover for absent colleagues? If so, what are the parameters?
- ? What is the annual leave entitlement for classroom teachers and school leaders?
 - Is this entitlement protected by law?
- ? Are there any non-pay conditions not covered in earlier questions?
- ? Have the non-pay arrangements of teachers or school leaders changed in the last 5-10 years?
 - If yes, is there any evidence of the impact of these changes?

APPENDIX B: SOURCES USED

Websites

Information on several countries

The Centre on International Benchmarking: <http://www.ncee.org/>

OECD: <http://www.oecd.org/education/>

EURIPEDIA, The European Encyclopaedia on National Education Systems:
<https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php>

Individual countries

Denmark

The Danish Ministry of Education: <http://eng.uvm.dk/>

The Danish Union of Teachers: www.dlf.org

The Danish Teacher Trade Unions: www.dlint.org

Finland

Finish National Board of Education: <http://www.oph.fi/english>

Ministry of Education and Culture: <http://www.minedu.fi/OPM/?lang=en>

Germany

Federal Ministry of Education and Research: <http://www.bmbf.de/en/>

Ireland

The Department of Education and Skills: http://www.education.ie/en/Circulars-and-Forms/Active-Circulars/cl0028_2011.pdf

<http://www.education.ie/en/Education-Staff/Information/Payroll-Financial-Information/Salary-Scales/Rates-applicable-to-personnel-appointed-before-1-January-2011-Circular-0004-2010-.pdf>

<http://www.education.ie/en/Schools-Colleges/Services/Quality-Assurance/SSE-Primary-and-Post-Primary/School-Self-Evaluation.html>

Norway

Ministry of Education and Research: <http://www.regjeringen.no/en/dep/kd.html?id=586>

Union of Education Norway: <http://www.utdanningsforbundet.no/skjulte-sider/Supportmeny/English/>

Sweden

Ministry of Education and Research: <http://www.government.se/sb/d/2063>

The Swedish National Agency for Education: http://www.skolverket.se/om-skolverket/om-oss/in_english

Canada

Council of the Ministers of Education: <http://www.cmec.ca/299/Education-in-Canada-An-Overview/index.html#02>

Ontario Ministry of Education: <http://www.edu.gov.on.ca/eng/>

Toronto School Board: <http://www.tdsb.on.ca>

<http://www5.statcan.gc.ca/cansim/a05>

<http://www23.hrsdc.gc.ca/.4cc.5p.1t.3onsummaryd.2tail@-eng.jsp?tid=58>

<http://www.otpp.com/corporate/about-teachers>

http://www.thestar.com/opinion/editorialopinion/2012/01/21/merit_pay_for_teachers_is_worth_a_look.html

USA

NYS Education Department: <http://www.nysed.gov/>

NYC Education Department:

<http://schools.nyc.gov/Offices/DHR/CareerOpportunities/Careers+in+School+Leadership>

Australia

Education Queensland: <http://education.qld.gov.au/>

<http://education.qld.gov.au/hr/recruitment/role-descriptions/schools/teaching/stream-3-princ-nps-111165.pdf>

Hong Kong

Education Bureau: <http://www.edb.gov.hk/en/>

New Zealand

Ministry of Education: <http://www.minedu.govt.nz>

Singapore

Ministry of Education: <http://www.moe.gov.sg/initiatives/compulsory-education/>

Teachers' Union: http://www.stu.org.sg/faq_tenure.htm

Publications

Information on several countries

Eurydice (2012) Teachers' and School Heads' Salaries and Allowances in Europe, 2011/12

Trade Union Committee for Education (2012), ETUCE School Leadership Survey Report

Finnish National Board of Education (2012), International survey on Educational Leadership: A survey on school leader's work and continuing education

OECD (2012), Education at a Glance 2012: OECD Indicators, OECD Publishing.

Ontario Ministry of Education (2010), Building Blocks for Education: Whole System Reform.

Schleicher, A. (2012), Ed., Preparing Teachers and Developing School Leaders for the 21st Century: Lessons from around the World, OECD Publishing.

Individual countries

Denmark

Danish Government (2012) How to Make a Good School Better: an improvement of the standards in the Danish public school

OECD Review on Evaluation and Assessment Frameworks for Improving School Outcomes (2011), Country Background Report for Denmark

Finland

Finnish National Board of Education (2012) Changing School Management Status Review

Germany

Authoring Group Educational Reporting (2012), Education in Germany 2012. An Indicator Report

Otto, K. (2007) Civil Service Salary System in Germany and Recent Reform Trends

Ireland

Drea, E. & O'Brien, J. (2012). Defining the Role of the Primary Principal in Ireland. Dublin: Hay Group

OECD (2012), Education Policy Outlook: Ireland, OECD Publishing.

Norway

OECD (2011), OECD Reviews of Evaluation and Assessment in Education: Norway, OECD Publishing

Canada

Collective Agreement between The Toronto District School Board and The Ontario Secondary School Teachers' Federation for the 2008-2009, 2009-2010, 2010-2011 and 2011-2012 school years

Good Governance: A Guide for Trustees, School Boards, Directors of Education and Communities

Resume Resource Package for the Applicants to the Principal / Vice Principal Selection and Promotion Process

Teacher Performance Appraisal: Teacher Requirements Manual 2010

USA

Agreement between THE BOARD OF EDUCATION of the CITY SCHOOL DISTRICT OF THE CITY OF NEW YORK and COUNCIL OF SUPERVISORS AND ADMINISTRATORS OF THE CITY OF NEW YORK LOCAL 1, AMERICAN FEDERATION OF SCHOOL ADMINISTRATORS, AFL-CIO

C-30 REGULATION GOVERNING THE SELECTION, ASSIGNMENT AND APPOINTMENT OF PRINCIPALS AND ASSISTANT PRINCIPALS

Australia

Australian Institute for Teaching and School Leadership (2012), Australian Teacher Performance and Development Framework

Department for Education, Training and Development: Conditions of Employment documents

Department of Education Training and Development: Teachers' Certified Agreement 2010

OECD (2012), Education Policy Outlook: Australia, OECD Publishing.

Hong Kong

Education and Manpower Bureau (2013), Teacher Performance Management

Education Bureau (2010), Guide to Salary Assessment for Aided Primary Schools

Education Bureau (2010), Guide to Salary Assessment for Aided Secondary Schools

Education Bureau (2012), School Administration Guide (2012/13 school year)

OECD (2012), Shanghai and Hong Kong: Two Distinct Examples of Education Reform in China, OECD Publishing

New Zealand

Ministry of Education (2008), New Zealand Education System: An Overview

Ministry of Education (2011), Ministry of Education Positioning Paper: Assessment [Schooling Sector]

Ministry of Education (2012), Leading from the Middle: Educational Leadership for Middle and Senior Leaders

OECD (2012), Education Policy Outlook: New Zealand, OECD Publishing

Primary Principals' Collective Agreement –2013-2016

Secondary Principals' Collective Agreement –2013-2016

Singapore

Kim-Eng Lee, C. & Ying Tan, M. (2010). Rating Teachers and Rewarding Teacher Performance: The Context of Singapore. (Paper presented at APEC Conference on Replicating Exemplary Practices in Mathematics Education, Koh Samui, Thailand, 7-12 Mar. 2010)

Sclafani, S. (2008). Rethinking Human Capital in Education: Singapore as a Model for Teacher Development. Washington D.C., Chartwell Education Group



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