Introduction
Whenever we introduce, or revise policies, or when we introduce new ways of working or deliver activities in a different way, we need to equality screen to decide if an equality impact assessment (EIA) is required. This helps us to consider the potential impact of what we do on different groups who are susceptible to unjustified discrimination and are afforded legal protection against this, whether by UK or other law. Crucially, we want to make sure that our decisions and ways of working are not going to have a negative impact on certain groups that cannot be reasonably justified, and also that we really take opportunities to advance equality of opportunity and foster inclusion.

The groups/characteristics
We particularly focus on: age, dependant responsibilities (with or without), disability (please note disabled people are hugely marginalised and discriminated against as a group, so give particular consideration to them), gender including transgender, marital status/civil partnership, political opinion, pregnancy and maternity, race or ethnic origin, religion or belief and sexual orientation. Invariably there are other areas and characteristics to consider and these can include full-time/part-time (or reduced hours) working, geographical location, tribe, language, dependent on the country we are working with.

Equality screening: is an equality impact assessment required?
A ‘yes’ answer to all the questions below means an EIA is required. A ‘yes’ answer to some of the questions, or doubt, will require a judgement to be made based on an evaluation of the extent to which what is proposed raises concerns about equality and inclusion, particularly in relation to the above groups/characteristics. If you decide that an EIA is required, please move to address the EIA questions overleaf.

If you answer ‘no’ to all of the questions, then an EIA is not required and you should include the completed section below as a record of your decision with the policy or change documentation.

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<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
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<td>A large number of people are affected</td>
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<tr>
<td>A small number who are particularly under-represented, or disadvantaged, or excluded are affected</td>
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<td>The proposed changes (if this is a change to an existing policy, function or practice) are profound</td>
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<td>The proposals will result in benefit for some people</td>
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<td>The proposals will result in disadvantage for some people</td>
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Record of Decision:
An equality impact assessment is required/not required (please delete as relevant)

Your name and location/department: Michael Little, Project Manager, Teaching.

Date: July 2012

Note: if an equality impact assessment is required, please send any relevant background documentation about the policy to the panel prior to the EIA meeting. This could include the draft policy, any background research or relevant papers.
EQUALITY SCREENING AND IMPACT ASSESSMENT

Details of the Policy, Function or Practice (referred to as policy hereafter)
Take as much space as required under each heading below.

1. Title of policy and name of policy owner

Teachers’ Learning and Performance Management

Policy owners: Anna Searle and Michael Little

2. People undertaking the EIA (strive for a minimum of 3 people with diverse backgrounds)

Preparatory work:
Mike Little, Esther Hay, Jane Franklin, Everton Merchant, Tim Phillips, Rachel Roberts, Javed Iqbal, Sheila Lumsden

Meeting on 16th August 2012
Jane Franklin, Deputy Head of Equal Opportunities and Diversity (Chair)
Michael Little, Spain (Policy Owner)
Peter Ashton, Bulgaria
Esther Hay, E&E
Susan Mawson, HR
Tim Phillips, E&E
Rachel Roberts, Manchester
Simon Schofield, P&P
Robert Taylor, Qatar
June Jackson, Note-taking

3. Background
Provide background to the policy or change, and why an EIA is required. Summarise any already apparent equality issues either addressed within the policy or to be included.

The existing Teachers’ Learning and Performance Management process focused on individual learning and the system has not been consistency implemented. The new process will retain a focus on learning and include performance management. Benefits to the business will be:

- Enhanced Teaching Quality (focusing teaching centres on Teaching Quality and achieving quality standards)
- Managing and recognising performance
- Improving management information to monitor quality and inform development priorities
- Consistency of standards
- Enhancing career support for teachers, career and talent management
- Support recruitment and identification of talent
- Consistent and transparent Teacher PM system globally which mirrors the corporate system where appropriate
Although aspects will remain the same there are changes to the Teachers’ Learning and Performance Management process that require assessment. **Key changes in the system, subject to local consultation, are:**

- The system will be on-line (similar to the Corporate on-line system)
- All centres will have an Academic Quality Plan (AQP) and teachers’ will have a minimum of one measureable learning objective that is linked to the AQP and this will be assessed and rated.
- Teacher Observations against the Teaching Skills will now be a standard part of the process and will be used to assess teacher performance as well as individual learning. These will follow a standard approach and training provided to promote consistency.
- Customer feedback will be gathered (using a standard on-line questionnaire).
- Teachers will be assessed and rated against the BC Behaviours.
- The system will provide management data at centre, regional and global level
- Light touch with start, mid, end of year meetings/reviews
- There will be a final overall summary of performance, covering what is achieved and how it is achieved, and a final rating (1-5 as with the corporate system) and this will take account of:
  - Teacher observations against teaching skills
  - The role profile
  - Learning objectives
  - Customer feedback through the standard questionnaire and other feedback
  - Behaviours in and outside the classroom
  - Work outside the classroom

The process will be supported by a Continuous Professional Development (CPD) portal for teachers and line managers which will complement and develop the existing L&D framework and corporate portal. The portal will build on the 6-stage continuing professional development framework developed for our external work in Global English. The guidance and pathways for development will also contribute to the talent management of teachers in our teaching centre network, providing training and support to line managers in effectively guiding teachers in the opportunities that the British Council offers and nurturing staff with the specialist ELT skills that are required to deliver the strategy for English in the future.

We hope that by implementing the system globally and introducing greater consistency of approach e.g. teacher observations, standard customer feedback, this will have a positive impact on equality issues. We also hope that the new CPD portal will have positive impact as it will give all teachers access to the same information on development and career options. Potential concerns relate to how well some of the elements will work in different cultures e.g. customer feedback.

4. **Supporting data**

   Summarise any relevant supporting data, for example any research, statistical monitoring data, staff surveys, client feedback, and consultation exercises.

At the start of the project baseline survey feedback on the current system was sought from Teachers, line managers and Teaching Centre Managers (TCMs). This showed a surprising correlation across all groups on what was seen as positive and what needed changing. Teachers and managers wanted to have an overall record of achievement and felt that the current system did not support management of performance. Highlights from the baseline survey from 587 teachers (>25% worldwide), 102 line managers, and 56 centres responded
• 70% of Ts, 75% of LMs / centre leads thought that all teachers no matter of contract type should have the same minimum standards in Teachers’ Learning and PM
• < 25% of stakeholders believe there is clear link between learning and PM in the current process
• < 20% of stakeholders believe there is a clear link between PM and recruitment in the current process
• < 50% of stakeholders feel the current process helps us manage teaching quality
• < 50% of stakeholders feel that TC priorities are incorporated into the current process
• < 40% of centre leads believe the current process provides sufficient evidence of learning, PM, other achievements and talent to support recruitment
• > 80% teachers would like their achievements recorded in learning, teaching and work done outside the classroom

The approach to developing the new system has been establish working teams made up of TCMs, Deputy/Assistant Teaching Centre Managers (D/ATCM) and Senior Teachers and HR Business Partners and HR Centres of Expertise. These teams attended workshops to develop the proposals.

Consultation has been with regions in the working groups and focus groups and surveys with line managers, teachers and centre leads and HR.

5. Panel meeting – 16th August 2012

The purpose of this meeting was to carry out an ESIA of the planned new performance management process.

The Chair confirmed that the task for the ESIA panel was to look at the draft policy and think about it from the perspective of the people in the protected equality groups, as listed in the ESIA form. The aim of the meeting was to try to make sure that within the policy and the way forward in performance management of teachers there is no potential for negative impact that might affect particular groups or, if there is, to explore whether anything can be done about that or whether it can be justified. The panel should look for any aspects of the policy that promote equality or inclusion, and identify potential additional ways of promoting equality or inclusion, alongside what is being suggested. The panel should also consider how what is proposed reflects British Council values.

The specific documentation focussed on were:

• The context and background as set out in the ESIA form
• Comparison of revised and current process
• Easy step guide to ratings
• Evaluation form (in hard copy, but also online in test format)

The Chair invited the policy owner to provide the background to the policy and process; what is hoped to be achieved from this change; to provide a steer about what the business requires and why this is happening; and to point the panel to any potential equality issues that have already been identified during the development of this policy and process.
The teaching business introduced a new system about five years ago focussing on teacher learning. This has created a quality focus on teaching, however feedback has shown that it has not helped manage performance effectively or record teacher achievements effectively. Internal research has shown that 50% of centres do not follow a consistent performance management process, and around 80% of teachers said that performance was not sufficiently recognised and they want achievements recorded in learning, teaching and work outside the classroom. In addition, the current system is paperbased and it has therefore been difficult to keep a track of what has happened in learning, and there have been no consistent outputs for recruitment purposes. This is why the process has been reviewed, aiming to keep the best of what is in the current process, but also to develop it further.

The new process will start in September 2012, and it will be a staggered roll-out regionally over the next year.

Guidance notes are being developed covering the various elements of the new system, including writing the end of year teacher evaluation form and using the career profile tool. This guidance will be widely available. Consideration will be given to how this is communicated and what training on the new system is provided to managers and teachers.

The policy owner worked through the different points, explaining the changes, following the headings set out in the document ‘Comparison of revised and current process’.

**Who is involved**

The intention of the new policy is that it will apply to all teachers, which is not the case with the current system that has been rather ad-hoc. It was considered that it was quite a risk for the business to exclude teachers who are on part-time or hourly paid contracts, as they are quite a large percentage of the teachers. In the new system, everyone who is not on an hourly paid contract should be fully on the new system. The hourly paid staff and part-time staff will also be on it, although there may be some who have a minimum level of performance management rather than the whole process. For example, there are minimum standards which operate in most contexts, although this is not consistent across the network and a decision needs to be taken about whether consistency will be required.

For example teachers on nine or fewer hours will have to be involved in observation, i.e. they are observed once or twice a year, and have three core meetings with a line manager throughout the year – at beginning, mid and end of year. There are some centres that have some unique features, such as a large number of hourly paid teachers employed. In these there is potentially a huge impact on the business and the details of the extent to which hourly paid teachers are involved will be determined locally, particularly if they are not employees.

The extent to which this might disadvantage hourly paid teachers who go on to a lighter version of the system, was discussed. If they are being reviewed at the end of the year there was a question as to whether it would be fair to assess them against all the standards for the teaching role and further consideration needs to be given to this. This was important if an hourly paid teacher at a later point wanted to apply for a different job in the organisation.

It was noted that hourly paid teachers could vary the number of hours they work, sometimes working nine hours or more, others not. This could change from term to term and a decision needed to be made regarding whether their inclusion in the system was dependent on a termly arrangement or on an aggregate number of hours.
It was noted that some hourly paid teachers may not want to be on the system, in which case it was important that there was a minimum level of engagement required. This, it was considered, should be the same regardless of the number of hours worked, as the quality issue and standard required by the business was still the same, regardless of what contract they are on. On the other hand, some may want to be involved fully, and it was suggested that there was a responsibility to facilitate and manage that. The policy owner confirmed that more work is required on determining how to manage the variable hours workers and greater clarification is needed around this. There will not be many hourly paid teachers in the first stage of the roll-out, in September 2012, and therefore there is time to work on this with the centres who have the large numbers of hourly paid teachers.

There is no comprehensive equality monitoring data available yet for the hourly paid teachers globally, although this data will be available in some countries and in some regions. The view of the panel was that this was a mixed group in terms of age, gender and nationality. It was noted that this data would be available once the e-HR system is up and running.

**Academic Quality Plan (AQP)**

Although the current system includes reference to teaching centre priorities, there has been no facilitating documentation to capture the academic quality priorities for a centre. The aim of introducing the AQP, a two to three year plan, is to consistently engage teachers and teaching staff across the teaching centres in formulating what teaching centre priorities are and then having a document which is accessible to all teaching staff which highlights what those centre priorities are. The guidance which will be provided will focus on this being a collaborative process in the teaching centres, and the intention is that everyone in a teaching centre will be invited to participate in the process. This is being trialled in one centre which has taken a very collaborative approach. It was agreed that in the guidance being written there should be an emphasis on taking a collaborative approach, ensuring that everyone has the opportunity to contribute, as feasible. It was important also to stress that expectations should not be raised which are not going to be met.

The aim will be to facilitate the teachers connecting their learning to a higher level priority, which will be set out in the AQP, and which will go through the business review process and will be managed in centres. When the TCM signs off the AQP, teachers will be made aware that the plan has been to business review, and the AQP has been finalised. All teachers will have a minimum of one learning objective which should link to the AQP.

**Method of record keeping**

The change in the method of record keeping is that everything is moving from a paper-based system to an online system. There were a couple of points raised regarding this. One issue is that not all teachers use Roam freely. They may use personal e-mails for any work they do outside the office. A way to minimise the negative impact of this is that the performance portfolio for teachers is being made accessible via external internet, so there will be no need to be connected to Roam to access it. A second point was that in a few cases there may be problems with connectivity, for example in some areas of SSA. It was still possible to remain paper-based and then connect in the centre to load the information online. It was felt that the organisational upgrade to IE9 would provide a technical solution as it would be possible to work on the computer and then, the next time the computer is connected to the online system, the information would be automatically uploaded. There are a small number of staff who do not have a username and password and part of the action for the TCM is to make sure those individuals have username and passwords, even if this is just for the purposes of accessing their portfolio system.
It was agreed that consideration should be given to any alternatives for a teacher who cannot access the system, due to a disability, for example. This could be checked with the wider corporate system which will probably have already addressed this issue.

**Performance year cycle**
The performance year cycle will remain as before.

Throughout the process, the teaching skills document, will be a tool for teachers to analyse their own sub skills set and identify areas for development. This sets out what each sub skill set is and what is it not. Evidence of the latter may contribute to the ‘Essential level' not being met.

**Core meetings throughout the year**
There is no change relating to the structure of the meetings which will remain at beginning, mid and end of year.

**Pre-planning meeting**
The changes here are to include in the pre-planning meeting a discussion about the academic quality plan and a career objective.

**Learning aims**
The only change here is that there is a reduction in the minimum number – the standard is to have a minimum of one aim, but a teacher can have more. This is a change from the previous system, which varied from eight aims, downwards, and there was no standard number. As mentioned above, the learning aims will link to the AQP. This had been raised as a concern by teachers in a survey on this issue, when around 60% of teachers said that they felt that learning was not connected to centre priorities. The overt linkage to the higher level priorities is therefore important.

A question was raised as to whether it would be possible to have a learning aim which was tied to behaviours, or teaching skills, for example an aim might be: improving your rating in connecting with others. The policy owner said that the learning aim was about ‘the job’ and the focus was on what you do, i.e. teaching. So, if part of your focus is about connecting with others within your environment, which is mainly within the classroom, then there is no reason why the learning aim could not be connected with the behaviours. Indeed, behaviours, e.g. connecting with others and building good relations, could also be included in the AQP if this was a consistent centre priority.

There was some discussion about the ownership of the learning aim and how compulsory it was. It was noted that a manager may want an individual to address a specific area of their work which they feel the individual needs to develop. Therefore, the selection of the learning aim, it was suggested, was not only the choice of the individual teacher, but should be decided in dialogue with the manager. Teaching style was cited as an example. If left solely to the individual, they may not identify that specific issue as a gap and therefore not select it as a learning aim. Clarification about the dialogue required to select the learning aim was required as well as ensuring that it was understood that everyone has to have a minimum of one learning aim, and indeed could have more than one.

**Career objective**
Feedback from teachers had included expressing concerns that although there was a check each year regarding their performance, there was no systematic build or link with their longer-term career. The revised process has taken this on board and introduced a new element of a non-compulsory career objective.
Response from the panel was that this was a very good development. It would be important that there were the resources and the knowledge to back it up and that, in order to ensure a consistent approach, there should be guidance for centres on how to support people to develop their career objective. The career profile tool has been developed to support learning and development of individuals along certain pathways and to help teachers analyse what their current career skillset is and identify where they want to go. To address the challenge of being consistent across centres, online resources which are accessible will be developed. It will be important to have ways of helping people understand the various learning opportunities, resources and career options and to communicate that this is a way of meeting a higher level objective of supporting teachers in their careers.

The panel noted that the career objective is excellent as an opportunity to promote equality and diversity. It was suggested that a way of monitoring access to and usage of the career profile tool would be useful as this would help identify if there are any areas where this is not being used.

An additional skills area which it was suggested could be added to the career profile tool, is ‘supporting students who have special needs’. This, it was considered, was an area where there was expertise developing within the E&E staff and its inclusion was a way of promoting equality and diversity. Since the ESIA panel meeting took place, further discussions have been held between the Diversity Unit and English & Education regarding language in this field. The term ‘special educational needs’ will be retained in our documentation because it is a term which is internationally recognised but we will also add the term ‘additional learning needs’ which is now more widely used in the UK as more positive language.

Achievements log
One of the factors which has been seen as best practice in the network has been where both line managers and line managees have captured things that happened through the year that have not necessarily been planned and which are considered to be good practice, or good achievements. In response to this, an ‘achievements log’ has been added into the system, as a non-compulsory element. The idea is for anyone who wants to collect evidence to bring to an end of year meeting, and it will then be accessible to the line manager. It will exist as an online shared between the line manager and the line managee.

There was some discussion as to whether this would be picked up in the rating, as it was purely an optional extra. The policy owner confirmed that this was not part of deciding the rating, but was an opportunity to collate information about activities that an individual has been involved in which they consider to be good practice and a good example. HR, however, commented that the additional work would be a factor in the final rating. The policy owner agreed that if the information collated in the achievements log showed that someone had done a particularly good job, then the line manager would be able to take that into account, if the achievement related to the individual’s formal work. The policy owner mentioned some examples of what these might be. These included: resolution of a complaint (dealing with a student, resulting in turning a student’s performance around; dealing with a parent complaint); taking on a project; development of some teaching materials; training delivery. It was noted that some of these things would fit into what a teacher was expected to do and some would be extra things that, if noted in the achievements log, could be recognised in the final year summary.

The guidance supplied to the line manager encourages them to look at the achievements log which can contain examples which relate to learning, teaching or work outside the classroom. It was noted that this is the only place at the moment that provides an opportunity to log
things that teachers have done outside the classroom and it was suggested that the guidance should stress this as it would help acknowledge this wider work.

The policy owner confirmed that the contents of the achievements log was not sent off as part of a job application and the only document that was sent in connection with an application was the performance evaluation.

**Observation**

It was acknowledged that observation was a widely discussed issue in teaching generally, both inside and outside the British Council. The aim is that observation should not be purely an assessment of performance but that it should contain some element of learning. The observation should produce information about how an individual is performing against teaching quality standards and teaching skills.

In the current system there is no obligatory observation, but it is recommended that this should take place. However, in a lot of centres this has not happened. As an evolution from that, the actual policy in centres varies. Currently around 50% of centres have two observations or more per year, 25% of centres have one, and 25% follow the original policy. This variation is a concern in terms of consistency.

The proposal is to move to a standardised approach, compulsory for all teachers, through two full observations per year, one before mid year and one before end of year. Additional observations are encouraged but are not compulsory. Training will be provided for observers.

One of the key concerns about observations is the consistency of them, from the teacher side and the observer side. With this in mind, a learning and development kit is being developed on management, reporting and the development of teachers through observation. People who do observations will be required to go through training based on the kit.

The policy owner explained the observation process and what is planned, following the structure of a flowchart that he had supplied to the panel. The steps are: pre-observation meeting; lesson plan; lesson; teacher reflection and prompts for reflection; post lesson discussion and summary report.

At the pre-observation meeting, the observer and the teacher would agree what support the teacher wants at different stages of the process. For example, at the lesson plan stage, when the teacher provides this to the observer, a teacher may, or may not, expect feedback. When feedback is provided this may result in the teacher making changes to the lesson plan. The process for this stage is agreed at the pre-observation meeting. In general, the onus is on the teacher to indicate if they want support. However, in cases where a teacher has less experience, or when observation is part of performance management, then more pro-active support from the manager at each stage might be provided. It was suggested that the wording ‘prompts for reflection (if agreed)’ should be changed to ‘prompts for reflection (as required)’. The policy owner suggested that an observer should have a guided feedback form to complete. They will, in any case, have a guide, with a clear set of criteria, to provide feedback in the post-lesson discussion. A further section on the flowchart is required to show this. Points from the post lesson discussion will feed into the summary report. This may lead to feeding through to a follow up observation, or the next observation in the cycle. Some detailed guidance on options for action could be provided, for example a follow-up observation, focus on a learning aim, etc.

The output of the observation is a summary report by teaching skills. It will highlight each of the five teaching skills and indicate the level an individual is expected to perform at (captured
by the role profile), and then how well they are performing at that. This will say whether the individual teacher needs development in a specific skill area, or if they are a good performer, or a strong performer. The summary report will focus on the core teaching skills and the text will be pulled automatically into the teaching section of the performance evaluation.

Guidance for observers should include how good equality and diversity practice is followed within the observation process and the summary report writing, drawing on good practice in the organisation.

**Mid year review**
There is a requirement for a mid year review and this is not a change from the previous system. What has changed is that teachers are not just expected to review only their learning, but to reflect on learning, teaching, the overall job and its specific requirements.

The mid year review should result in a provisional rating.

There was a question as to how the proportions of ratings compared with the rest of the organisation and it was confirmed that there is no ‘bell curve’ in use for the teacher performance evaluation system. If, for instance, it was felt that there was a greater likelihood of getting a ’strong’ rating as a teacher than the rest of the organisation, or vice versa, then this would be relevant, and potentially unfair on a teacher should they apply for a post in a different part of the organisation. In relation to this, it was suggested that there should be a moderation of the ratings in each centre across different job types and there was some experience in the organisation of doing this that could be drawn on. The policy owner said that a consistent approach was aimed for, and moderation would take place at the end of the year rather than mid year.

**End of year review**
The end of year is all about the teacher and their reflections. At this point it is expected that a teacher will have identified and delivered on some learning aims, possibly have developed a career objective, and have had two observations which have generated reports setting out strengths and weaknesses and areas for development. They may have recorded in the achievements log any unplanned achievements and learning which have happened during the year. Also at this stage there is an expectation that customer feedback would be available, providing comments on teacher performance. What that looks like and how it will operate is in development. There may also be positive evidence that the line manager has collected from other colleagues, peers and other managers.

There was some detailed discussion about customer feedback. The policy owner began by explaining that this is a change and there has to date been no consistent collection of customer feedback, nor has it fed into performance management before. Currently data is collected for teaching centres for the purposes of the scorecard from a small sample and it is not possible to get a report back on any individual class. The change is that the scorecard questionnaire will move from being paperbased to be fully automated. All students and customers will be sampled every year at set points throughout the year. Based on that information, which will cover some core areas, such as teaching quality, to what extent they are making progress, etc., the information gathered will feed back into a report which is provided down to a class level. This will mean that there will be information from a group of students, or a composite of all the classes that a teacher teaches, on what they are saying about that teacher. A line manager would receive that report, which would be brought to the mid or end of year performance evaluation conversation. It was noted that customer feedback may already have been discussed with the teacher during the year. There will be no direct correlation between the feedback and what goes into the performance evaluation.
This is because there are all sorts of factors which feed into what students feed back. The conversation with the teacher would focus on why customers are saying what they are.

There was some discussion about customer evaluation and metrics and concern was expressed not to try to combine customer feedback with performance evaluation. Broadly speaking, there are two main reasons for collecting data from customers. One is for monitoring performance and the other is for getting customer feedback. It is difficult to collect the data for two purposes from one exercise. In general, it was suggested, the purpose for data from customers being collected affects the results - if staff are aware that they are being assessed from the customer feedback that has been found to influence results.

The policy owner confirmed that, in relation to the survey of customers in the teaching centres, staff would likely not be aware of the exact time when the exercise was being carried out, but they would be aware that data was being collected at some point. This is an area to take forward. One of the reasons that the scorecard option is being pursued is that a) the management and administration of sampling of customers is a big task for teaching centres and b) there has been a refocusing of part of the scoreset on teacher performance. An alternative approach which was considered was to have a discrete questionnaire on customer experience, around specific teaching skills, which would correlate directly with performance. However, it was decided that that would lead to over-sampling, resulting in confusing the customer.

The scorecard approach has not been trialled yet as part of evaluating teacher performance. Set backs have meant that the live survey system will not be available until the new financial year i.e April 2013. There was discussion about whether this first stage could be treated as a ‘pilot’ before release. The policy owner confirmed that once the first stage was in place, then at that point there will be scrutiny of the data to see how it can be used effectively in performance management conversations. It was noted that, as a general rule, an optimistic response rate was 20% response. This would therefore need to be reflected on, to ensure that this does in fact provide the customer feedback required for teacher evaluation. In addition, it was noted that, generally, the people who respond to this type of questionnaire are the people with extreme views, either positive or negative, and results tended therefore not to be a balance of what the class in general feel.

There were felt to be some concerns around customer feedback exercises and equality grounds. For example, the potential for negative feedback about a teacher because of their sexual orientation, if that is markedly different from the culture that they are operating in. It could also be around other equality issues and a negative perception of a teacher because of issues including disability, gender, native/non-native (teacher of English), transgender, race or religion or other equality areas. In effect, this is potentially an opportunity for a group, a class, to give negative feedback about a teacher because of a particular characteristic. It was important that the system was rigorous enough to be confident that any negative feedback related to a view on teaching quality and was not for another reason.

It was noted that children are not surveyed in the same way as adults, i.e. it is their parents who provide the feedback. For teachers who only teach young learners, the feedback will be from the children’s parents rather than the children themselves.

The system for customer feedback will be online, and therefore responses will be dependent on people who have computers and are online. The policy owner is awaiting the final version, but confirmed that the system does rely on someone having internet access. It was suggested that people could be offered the option of doing it in the centre.
**Performance evaluation**

The policy owner clarified that the project scope did not include linking teacher performance evaluation ratings to pay.

In the document ‘Easy step guide to rating’, in relation to teaching skills and behaviours, in the ‘Setting expectations’ section it is noted that a teacher should be assessed at ‘Essential level 1’. However this requirement can be changed, i.e. revised upwards, according to the centre. On the one hand, this is good as it gives flexibility locally, and on the other hand it is not very good for globally mobile teachers. A teacher who is applying for another post from a centre where everything is rated at 1, and they are meeting or exceeding expectations, may be competing with somebody else coming from a teaching centre where the manager has set Level 2 as the standard for all of their teachers. Someone from that centre may not have been doing as well, but in terms of recruitment the latter may be preferred because they have been working to Level 2. Allowing centres to set inconsistent levels was, it was considered, disadvantaging globally mobile teachers.

A wider point than this evaluation is the need to have different ways of assessing teachers according to their amount of experience. It was noted that a whole range of teachers – newly qualified, developing and very experienced – would be assessed on the same criteria and there was some concern about this as, it was felt, a teacher with a much greater amount of experience would be expected to perform at a different level from a newly qualified teacher, for example. This was considered to be a wider point for consideration and action beyond the scope of this performance evaluation exercise. However it was suggested that Susan Mawson was to take this forward.

There was some clarification needed as to whether the aim was to have a global standard or an individual standard. The policy owner understood that the aim was to have a global standard across the world, to get consistency of experience. Because of different levels of experience, it was unclear if it was possible to compare ‘like with like’ in the final rating. Some will, in addition, be working to ‘more demanding’ or ‘most demanding levels’ but all will be assessed against the ‘Essential level’. It was recommended that the guidance is very clear that all teaching staff will be assessed on ‘Essential level’, but they may also get feedback if they have shown that they have worked to a ‘more demanding’ or ‘most demanding’ level. In addition, moderation of ratings at end of year would, it was felt, give an extra layer of protection against inconsistent ratings by different line managers in an office and would mitigate the risk of inconsistent treatment between the teaching centre and other parts of the office.

Guidance will be in place and follow corporate norms for the process should a performance improvement plan (PIP) be required. This will include both when a PIP should be initiated, its nature, and training on evaluating performance against a PIP.

An area of some concern was the ‘teaching technology’ skill. Some of the things that are assessed, for example students using resources outside the classroom, and teachers using IT available in the centre, means that this is potentially disadvantageous to people who are in situations where these skills are more difficult to apply, because they work in centres where people don’t have any access, or have limited access to the internet outside the classroom, and also people who work in very small centres which do not have all the resources. Guidance should be clear that this may in some circumstances be recorded as ‘not appropriate’.

The question was raised as to what the potential impact was for people who may have maternity leave, or sick leave during the reporting year. Dates would be slightly different,
because the teaching staff have different performance from other types of roles in the organisation, but the principles applied in other parts of the organisation would be the same. This needed to be clear in the guidance, to ensure consistency across the organisation.

It was recommended that the system which is developed for the teaching staff should look as similar as possible to the system that non-teachers use. It was pointed out that the look of the final summary, and the way that it is presented is, however quite different from the corporate system. It was considered important that there was wide understanding of the differences between the two systems. It was also important that the rating was, and was perceived to be, equivalent to all other jobs, i.e. that are they being assessed in the same way for the same standards. Skills would be different, but behaviours ought to be exactly the same. This was important for any teacher looking to apply for a different type of post and further thought needed to be given to this.

The focus on consistency, on recording achievements widely in achievement logs, and the intention to bring it close to the corporate system, were felt to be strongly in line with the values.

It was important, it was considered, when staff apply for other jobs that it is not just their recent work experience and performance that is taken into account. This wider experience would not be available through their evaluation, which would be based on what an individual has demonstrated in a given period. This was a wider point for the use of performance evaluation reports generally, not just for teaching staff. Although the evaluation would be used for recruitment purposes, it was noted that there was an opportunity to show wider skills in the CV application, which was important in particular for those who had not progressed in a linear way, but had done different things in the past, accumulating different skills and knowledge at a variety of points.

A broader discussion about age and career development in the organisation and how staff are managed and motivated as they get older was a point for consideration in the organisation as a whole.
6. Identification of potential negative impact and opportunities to promote equality

Identify areas of concern, discuss them and identify what can be done to address them. Identify too any changes that could be made to enhance equality and support inclusion. Include an additional row for any overall points if relevant. 

Take as much space as required for each category discussed.

<table>
<thead>
<tr>
<th>Equality categories</th>
<th>Summary of key issues</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Potential for negative impact</td>
</tr>
<tr>
<td>Age</td>
<td>None identified</td>
</tr>
<tr>
<td>Dependant responsibilities (with or without)</td>
<td>None identified</td>
</tr>
<tr>
<td>Disability (physical, mental, learning, sensory)</td>
<td>The system may not be able to be accessed by a teacher because of a specific disability.</td>
</tr>
<tr>
<td>Gender including transgender</td>
<td>See point re customer feedback below</td>
</tr>
<tr>
<td>Marital status/civil partnership</td>
<td>None identified</td>
</tr>
<tr>
<td>Political opinion</td>
<td>None identified</td>
</tr>
<tr>
<td>Pregnancy and maternity</td>
<td>Potential for negative impact of little evidence available for assessment.</td>
</tr>
<tr>
<td>Equality categories</td>
<td>Potential for negative impact</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>Race or ethnic origin</td>
<td>See point re customer feedback below</td>
</tr>
<tr>
<td>Religion or belief</td>
<td>See point re customer feedback below</td>
</tr>
<tr>
<td>Sexual orientation - lesbian, gay, bisexual, or heterosexual</td>
<td>See point re customer feedback below</td>
</tr>
</tbody>
</table>

British Council values

| Any additional equality grounds and/or any examples of combined grounds including but not limited to full-time/part-time (or reduced hours) working, geographical location, tribe, language, dependent on the country the policy applies to. | There is potential for a negative impact on hourly paid teachers if they are only assessed on some of the standards of the teaching role. This was important if an hourly paid teacher at a later point wanted to apply for a different job in the organisation. | Offer hourly paid teachers the option of being on the full system. |

There were felt to be some concerns around customer feedback exercises and equality grounds. For example, the potential for negative feedback about a teacher because of their sexual orientation, if that is markedly different from the culture that they are operating in. It could also be around other equality issues and a negative perception of a teacher because of issues including disability, gender, native/non-native (teacher of English), transgender, race or religion or other equality grounds. In effect, this is potentially an opportunity for a group, a class, to give negative feedback about a teacher because of a particular characteristic. Any customer feedback system used needs to be rigorous enough, in its design and/or analysis and use of data, to be confident that any negative feedback relates to a view on teaching quality and not for another reason. |

Introduction of the career objective as a non-compulsory element. This will help increase wider access to career and development opportunities for all.
### Summary of key issues

<table>
<thead>
<tr>
<th>Equality categories</th>
<th>Potential for negative impact</th>
<th>Opportunity to promote equality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>In the customer feedback exercises, offer the option of completing the questionnaire in the centre, which will provide access for those who are not online.</td>
</tr>
</tbody>
</table>

### 7. ACTION PLAN

Please itemise any agreed actions:

*Add more rows for further action points as required.*

<table>
<thead>
<tr>
<th>Action</th>
<th>Person responsible</th>
<th>Target date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Ensure that guidance on the new system is widely available. Consider how it will be communicated to managers and teachers and what training on the new system is provided.</td>
<td>Michael Little – coms plan in place for TC stakeholders, resources and training built for go live and key steps in the process for first region rollout EA</td>
<td>End Sept</td>
</tr>
<tr>
<td>2. Decide if minimum standards should operate across all teaching centres.</td>
<td>Michael Little - HR workgroup to focus on implications and minimum standards</td>
<td>End Dec</td>
</tr>
<tr>
<td>3. Provide guidance on the extent to which hourly paid teachers are involved will be determined locally. Decide whether their inclusion in the system is dependent on a termly arrangement or on an aggregate number of hours.</td>
<td>Michael Little , work group as above</td>
<td>End Dec</td>
</tr>
<tr>
<td>4. Decide whether hourly paid teachers will be assessed against all the standard for the teaching role. Consider offering the option of being involved in the full system.</td>
<td>Michael Little , work group as above</td>
<td>End Dec</td>
</tr>
<tr>
<td>5. Check that the equality monitoring data for hourly paid teachers will be included in the new e-HR system.</td>
<td>Susan to raise with HR team</td>
<td>End Sept</td>
</tr>
<tr>
<td>6. Ensure that the guidance for the Academic Quality Plan has an emphasis on taking a collaborative approach, ensuring that everyone has the opportunity to contribute, as feasible. Expectations should not be raised which are not going to be met.</td>
<td>Michael Little - done</td>
<td>End Dec</td>
</tr>
<tr>
<td>7. Inform the CMs that they need to provide usernames and passwords to any staff who currently do not have them. These will be needed even if this</td>
<td>Michael Little - done</td>
<td>End Dec</td>
</tr>
<tr>
<td>Action</td>
<td>Person responsible</td>
<td>Target date</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>is just for the purposes of individuals accessing their portfolio system.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Clarify in the guidance that the learning aim will be decided in a dialogue between the individual teacher and their manager. It should be clear that a minimum of one learning aim is required, however there could be more than one.</td>
<td>Michael Little - done</td>
<td></td>
</tr>
<tr>
<td>9. Ensure that there is guidance for teaching centres on developing ways of helping teachers understand the various learning opportunities, resources and career options. Communicate that this is a way of meeting a higher level objective of supporting teachers in their careers.</td>
<td>Part of planning training for LMS / teachers. Development with next steps CPD Michael Little in collaboration with Jon Gore</td>
<td>December 2012</td>
</tr>
<tr>
<td>10. Monitor access to and usage of the career profile tool, aiming to identify if there are any areas where this is not being used, or groups that there is limited take-up from.</td>
<td>As part of build , ML to put in project scope</td>
<td>October for initial scope</td>
</tr>
<tr>
<td>11. Add a further skills area, ‘supporting students who have special/additional learning needs’, to the career profile tool.</td>
<td>Michael Little - done</td>
<td></td>
</tr>
<tr>
<td>12. Stress in the guidance that the achievements log at the moment is the only place that provides an opportunity to log things that teachers have done outside the classroom. This should clarify what type of activities logged could be taken into account in deciding the rating, and which would not be taken into direct account in this way.</td>
<td>Achievements also logged at mid and end of year review. ML – Guidance on this achievements log fact sheet rating guidance is clear about what is factored</td>
<td>Done</td>
</tr>
</tbody>
</table>
| 13. Make the following amendments to the observation process:  
  - in the observation flowchart, change the wording ‘prompts for reflection (if agreed)’ to ‘prompts for reflection (as required)’  
  - design a guided feedback form for use by observers  
  - add a section to the flowchart showing an additional step showing the provision of feedback – this may lead to feeding through to a follow up observation, or the next observation in the cycle  
  - provide in the guidance a range of details about options for action, for example a follow-up observation, focus on a learning aim, etc.  
  - provide guidance on how good equality and diversity practice is followed within the observation process and the summary report writing, drawing on good practice in the organisation. | Michael Little -  
  - Done  
  - Done  
  - Done  
  - Check in training materials  
  - Get input form Jane on this – Susan to follow up |                      |
<p>| 14. Consideration should be given to having moderation of the ratings in                                                                                                                                                                                              | To feed in to development of moderation | March 2013           |</p>
<table>
<thead>
<tr>
<th>Action</th>
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<th>Target date</th>
</tr>
</thead>
<tbody>
<tr>
<td>each centre across different job types, to aim for consistency. Any moderation system should draw on good practice used in the organisation as a whole.</td>
<td>approach – ML</td>
<td></td>
</tr>
<tr>
<td>15. Consider the impact of allowing centres to set different levels of skills, given the potential disadvantage to globally mobile teachers. Or potential to have standards in place for different experience, qualifications and roles across network</td>
<td>Review planned to inform policies on influence of experience and qualifications on teaching skills set</td>
<td>October end</td>
</tr>
<tr>
<td>16. As there are situations where there is limited equipment and therefore the technological skills area may be more difficult to apply, consider including in the guidance that this area in some circumstances may be recorded as ‘not appropriate’.</td>
<td>Explore issues through SSA introductory training and at that point outline any possible action points</td>
<td>Nov</td>
</tr>
<tr>
<td>17. Ensure that it is clear in the guidance that the principles which are applied in other performance evaluations in the organisation relating to staff who have been on maternity leave, or on sick leave, would be the same, ensuring a consistent approach.</td>
<td>Yes agreed</td>
<td></td>
</tr>
<tr>
<td>18. Give further thought to any differences in the look and structure of the performance evaluation reports for teachers compared to those for other staff in the organisation. It is important that the teacher rating is, and is perceived to be, equivalent to that of all other jobs.</td>
<td>ML – consultation done with PM team</td>
<td></td>
</tr>
<tr>
<td>19. A wider point than this evaluation is the need to have different ways of assessing teachers according to their amount of experience and this should be raised separately from this ESIA as it is beyond the scope of this exercise. The point noted was that a whole range of teachers – newly qualified, developing and very experienced – would be assessed on the same criteria and there was some concern about this as, it was felt, a teacher with a much greater amount of experience would be expected to perform at a different level from a newly qualified teacher, for example.</td>
<td>Link to 15 Susan to take forward as consultation</td>
<td>October</td>
</tr>
<tr>
<td>20. A wider discussion about age and career development in the organisation and how staff are managed and motivated as they get older is a point for consideration in the organisation as a whole and should be raised separately from this ESIA.</td>
<td>back to HR and EO&amp;D – Susan Mindful as we develop CPD framework.</td>
<td></td>
</tr>
</tbody>
</table>
8. ANY SUMMARY COMMENTS

The Chair noted that several points relating to the equality categories had been raised, including some opportunities to promote equality. She confirmed that panel members could come back with comments after this meeting. In addition, they would have an opportunity to comment on the draft report.

9. RECORD-KEEPING

This document should be retained by the department for monitoring purposes. Please arrange for a copy of the report to be entered onto the diversity intranet site by e-mailing it to ESIA@britishcouncil.org

Signed off by policy owner:

Name: Michael Little

Position: Project Manager, Teachers’ Learning and Performance Management

Date: Oct 2012