



MINISTRY OF EDUCATION

In Partnership with Manpower

Teacher Performance Management:

A resource for boards of trustees, principals and teachers

★ Secondary School Teachers

★ Area School Teachers

★ Unit Holders

October 1999

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Teacher Performance Management

Contents

Foreword.....	2
1. Introduction	3
2. Performance Management	4
Additional Requirements	4
3. What are Professional Standards?	9
Staff Selection	9
Performance Expectations	9
Performance Appraisal	9
Professional Development	10
Competence Procedures	10
4. Teachers' Pay Progression	11
5. Performance Indicators	14
Developing Performance Indicators	14
6. Performance Expectations	16
Key Steps of the Process	16
7. Assessment Methods	18
8. Additional Sources of Information	20
Appendices	21
Appendix 1: Part 1 - Professional Standards for Secondary School Teachers and Unit Holders	22
Part 2 -Salary Progression Requirements for Secondary School Teachers	25
Appendix 2: Part 1 - Professional Standards for Area School Teachers and Unit Holders	27
Part 2 -Salary Progression Requirements for Area School Teachers	30
Appendix 3 Sample Performance Indicators for Secondary and Area School Teachers and Unit Holders	32
Appendix 4 Integrating Professional Standards - Case Studies	41
Appendix 5 Teacher Registration Board Requirements	45
Glossary	48

Teacher Performance Management

Foreword

Performance management, like education, is a dynamic process. The introduction of professional standards for teachers is a logical progression in an environment that demands high quality teaching and improved learning outcomes for students. The professional standards build on systems and criteria already operating in schools. They provide the basis for positive feedback and recognition of the contribution that a teacher makes to the school and the education of their students. They provide the basis for dialogue about further professional development and growth.

The introduction of the professional standards also provides an opportunity for school leaders to demonstrate that performance management is a shared responsibility, an opportunity to work as a team with teachers to define goals and expectations and agree how achievement is going to be measured. Best practice in performance management is about involving everyone in the process.

This resource has been developed to assist schools to implement the professional standards. Many principals have indicated that sample performance indicators would be useful to them in incorporating the standards. It was important that the examples were practical and realistic and could be adapted for use in any school. To this end the Ministry enlisted the help of a number of principals and teachers from a range of schools. These practitioners generously gave their time, shared their knowledge and the benefits of their experience to develop the sample indicators. The outcome is a resource that will both provide direction for many schools and allow scope for different approaches.

Performance management is not new. Many schools have already developed effective systems, including standards and indicators. While the professional standards will be a new element for some schools, for others the standards merely reflect existing practice. The introduction of the professional standards will help to ensure all teachers and school leaders are supported and recognised in their contribution to improved learning outcomes for their students.



Howard Fancy

Secretary for Education

Teacher Performance Management

1. Introduction

Performance management systems (PMS) for principals and teachers have been mandatory in all New Zealand schools since 1997. Professional standards for secondary and area school teachers and unit holders were released in June and August 1999 respectively, for schools to incorporate into existing performance management systems. From the beginning of 2000 secondary and area school boards and principals will be required to ensure their PMS includes the professional standards.

Since 1996, secondary teachers have been assessed against the criteria set out in Appendix G of the Secondary Teachers' Collective Employment Contract (STCEC). Area school teachers have been assessed against Appendix 5 of the Area School Teachers' Collective Employment Contract (ASTCEC). These criteria provided a base against which progress of teachers could be assessed for professional development, pay progression and competency purposes. The professional standards replace Appendix G and Appendix 5 of the above contracts.

This booklet provides a practical reference to assist schools integrate the professional standards into their current PMS. It builds on previous publications such as the PMS series and the booklets *Professional Standards: Criteria for Quality Teaching, Secondary School Teachers and Unit Holders, July 1999* and *Professional Standards: Criteria for Quality Teaching, Area School Teachers and Unit Holders, August 1999*.

Key features of the professional standards are described along with examples of performance indicators for clarifying performance expectations and measuring achievement. Case studies of the processes some schools are planning to use to interpret and incorporate the standards into their performance management systems are also included. Common questions about performance management and the professional standards are addressed throughout the booklet.

The following organisations were consulted about this publication:

Post Primary Teachers' Association, Teacher Registration Board, New Zealand School Trustees Association, Te Puni Kōkiri, Education Review Office, Secondary Principals' Association of New Zealand, New Zealand Area Schools' Association, Te Akatea, Te Runanga Nui o Nga Kura Kaupapa, Association of Proprietors of Integrated Schools, New Zealand Intermediate and Middle Schools Association, State Services Commission.

Teacher Performance Management

2. Performance Management

The objective of performance management in schools is to:

- improve learning outcomes for students by improving the quality of teaching and leadership
- integrate policies, practices, standards and procedures that link the goals and objectives of the school and staff
- set agreed performance expectations and the processes for measuring performance against those expectations
- focus on the professional development of every teacher.

Boards of trustees are currently required to have a performance appraisal process that specifies the:

- person(s) responsible for implementing the appraisal policy
- process to be followed to appraise teacher performance
- process for dealing with disputes
- policy on confidentiality.

Similarly, boards of trustees must also ensure that the appraisal process includes:

- identification of the teacher's appraiser, in consultation with the teacher concerned
- a written statement of performance expectations, in consultation with each teacher
- identification of development objective(s) in the performance expectations, as well as the assistance or support to be provided
- observation of teaching (for those with teaching responsibilities)
- teacher self-appraisal
- an annual appraisal with a written report, in consultation with the teacher.

Additional Requirements

The new secondary and area teachers' collective employment contracts and promulgated individual employment contracts mean that a school's performance management system must now include:

- the appropriate level of professional standards as part of the performance expectations for each teacher
- annual assessments against all professional standards at the appropriate level
- progression for teachers who meet the professional standards to the next step in the salary scale (teachers will continue to be assessed against the appropriate level of professional standards when they have reached their base scale maxima).

The intention of performance management in schools is to deploy staff skills, knowledge, training and talent in a way that maximises the learning outcomes for students. Effective performance management enables boards of trustees to have confidence that all staff are meeting the educational needs of their students and the goals of the school. Principals are now required to more systematically define, support and assess staff performance, and to link staff efforts to the overall direction of the school. Individual

Teacher Performance Management

staff will know what is expected of them, the support available to them to meet those expectations, how their performance will be monitored and assessed, and how they can further develop their skills.

Effective performance management occurs in supportive working environments where there is a high level of communication and trust. It is not about setting people up to fail by setting unrealistic goals, or surprising staff at the end of a performance period with tasks and responsibilities they should have achieved but were not aware of, or unreasonably justifying why a remuneration increment should be withheld.

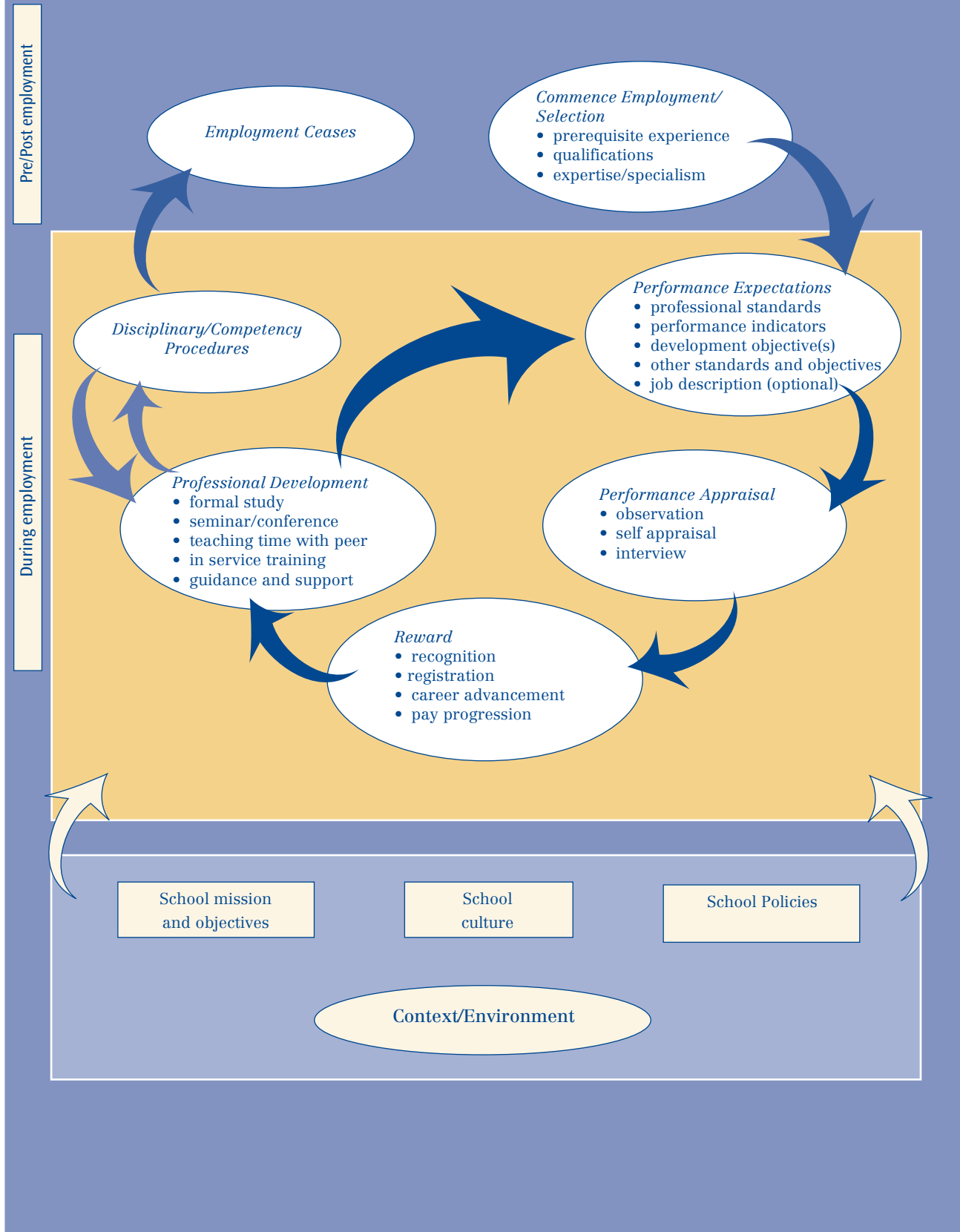
Diagram 1 shows how performance management components are related and how they apply throughout a staff member's term of employment. It gives examples of likely activities in each of these components, and acknowledges the context and environment that will make each school's performance management system unique.

Most staff will experience only those processes related to the annual performance management cycle - setting expectations, appraisal, reward (pay progression and career advancement), and professional development. This will not change. The professional standards will however, influence many aspects of performance management because they outline the expected standards of performance, are linked to teachers' pay progression and help identify areas for professional development.

Diagram 2 shows where the professional standards are likely to impact on schools' performance management systems. These implications are explained more fully in the sections that follow.

Teacher Performance Management

Diagram 1 - Performance Management in Schools

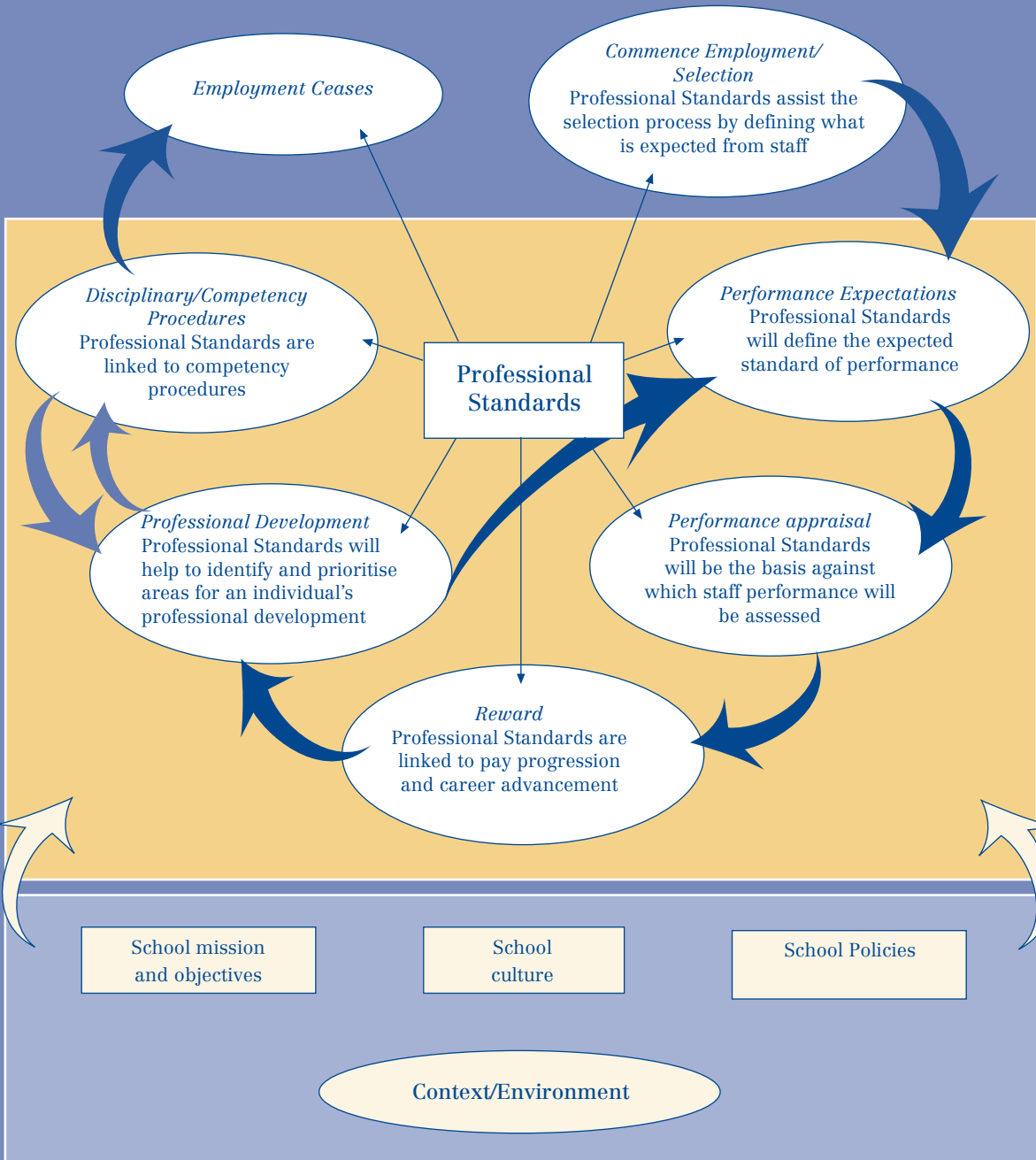


Teacher Performance Management

Diagram 2 - Integrating Professional Standards into Performance Management in Schools

Pre/Post employment

During employment



Teacher Performance Management



We currently have separate systems for development and appraisal. Should we continue to maintain these two systems now that the professional standards need to be incorporated?

Development and appraisal are both part of the performance management cycle. One system is recommended because it is simpler and potentially more effective and efficient. However, it is up to each school to decide what works best for them.

Who is responsible for the appraisal of itinerant teachers or teachers in specialist positions?

The employing school is responsible for the teacher's attestation. However, with the teacher's agreement, other options could be considered for the performance management of teachers who teach in more than one school. Options include appraisal being:

- *undertaken by the base school in consultation with client schools*
- *delegated to a client school*
- *undertaken by client schools on an annual rotational basis.*

Guidelines for the appraisal of teachers in specialist positions are outlined in the Ministry of Education booklet Performance Management Systems: PMS 5, November 1997.

Should ancillary staff be appraised?

The mandatory requirements for school PMS apply specifically to teachers. It is up to boards to decide how to manage the performance of their non-teaching employees.

Should relief teachers be assessed against the professional standards?

The professional standards apply to all teachers covered by the STCEC, the ASTCEC or the promulgated individual employment contracts. Long term relievers would normally be included in the school's performance management system and assessed against the professional standards at the appropriate level. Day to day relievers, however, receive salary increments for every 190 days of service and would not be assessed against the professional standards.

Teacher Performance Management

3. What are Professional Standards?

Professional Standards:

- describe the important knowledge, skills and attitudes that all teachers and unit holders are expected to demonstrate in carrying out their role(s)
- replace Appendix G and Appendix 5 criteria of the previous STCEC and ASTCEC
- expand the existing three key performance areas - teaching, school-wide and management responsibilities, already specified in the 1997 PMS requirements
- formalise the Government's expectations of professional performance of teachers and school managers

These standards build on existing performance management systems in schools. They have been designed to establish a consistent performance management framework that is sufficiently flexible for individual schools to adapt to their particular school climate, culture and community.

The STCEC and ASTCEC specify that the professional standards are to be used in assessing an individual's entitlement to salary progression. The relationship between the standards and pay progression is explained further in section 4. The professional standards for secondary teachers and area school teachers and unit holders are included as appendices to this document.

The professional standards relate to aspects of the performance management process as follows:

Staff Selection

The professional standards, along with any performance indicators schools may have developed to describe the tasks and behaviours that are expected, can provide a guide on what to look for in a prospective candidate. They also give applicants a full and realistic picture of the position they are applying for and responsibilities involved.

Performance Expectations

The professional standards describe the expected standard of performance for unit holders and for three levels of teaching - beginning classroom teachers, classroom teachers and experienced classroom teachers. These levels have been designed to build on each other to recognise the development of skills as teachers progress through their careers. This also enables teachers and their managers to identify goals for professional and personal development. The professional standards are therefore a fundamental part of the performance expectations between the appraiser and the staff member. They clarify what performance and/or behaviours the school is particularly looking for.

Performance Appraisal

The introduction of professional standards means the appraisal will focus on a staff member's performance against each dimension. For teachers, this means the nine dimensions of the professional standards will form the basis of the performance appraisal. A written appraisal report is required for discussion and consultation with the teacher.

Teacher Performance Management

The appraisal of unit holders will focus on the unit holders' standards that apply to their specific leadership responsibilities. In respect of any classroom teaching duties, unit holders will also be assessed against the professional standards at the appropriate level.

Professional Development

Professional development objective(s) can now be tailored for each staff member based on their performance as assessed against the professional standards. This will also assist in prioritising individual professional development needs alongside school priorities.

Competence Procedures

The introduction of professional standards clarifies the expected standard of performance and therefore what constitutes unacceptable performance before competence procedures are commenced.

Teacher Performance Management

4. Teachers' Pay Progression

Rewarding performance and achievements is an integral part of performance management systems. Professional standards enable appraisers to clearly identify staff who have achieved the expected levels of performance.

Professional Standards:

- are linked to teachers' pay progression
- continue to apply even after a teacher has reached their base scale maximum

Assessment against the professional standards is required annually. Teachers need to demonstrate performance against all of the professional standards at their current level before they can progress to the next level on the salary scale.

The professional standards are linked to pay increases through the STCEC and ASTCEC settlements. The settlements require that, from the beginning of the 2000 school year, pay progression on the base scale will be subject to the employer attesting annually that the teacher has met the all of the professional standards at the appropriate level.

Secondary teachers who have been on the base scale maximum for 12 months or longer when the new rates are introduced on 19 April 2000 (second tranche), are required to be attested as meeting all of the professional standards at the appropriate level before moving to the new rate at the top of the salary scale.

Area teachers (H1 and H2) who have been at their qualifications maxima for 12 months or longer at 19 April 2000 (second tranche), are required to be attested as meeting all of the professional standards at the appropriate level before moving to the new rates. H3 teachers who have been at step 12 for 12 months or longer at 19 April 2000, will be eligible to move to step 13 provided they have been attested as meeting all of the professional standards at the appropriate level.

The appropriate level of professional standards will need to be confirmed between each teacher and their manager and documented. The teacher will need to demonstrate that he or she meets all of the standards at the appropriate level in order to progress to the next step on the salary scale. The employer will be required to attest that the teacher has met the standards in order for the salary increment to be paid - as was the case under Appendix G and Appendix 5.

Additional standards or performance objectives that reflect the special character of the school or an individual teacher's role may be negotiated between the principal and teacher, but these cannot be used as the basis for determining salary progression.

Salary progression requirements

Salary progression requirements for secondary teachers are outlined in Appendix 1 and for area school teachers are in Appendix 2 of this document.

Deferred progression

The STCEC and ASTCEC both provide for deferred salary progression where the teacher has not met the standards. The deferred progression requirements are also outlined in Appendices 1 and 2.

Teacher Performance Management



Does a teacher have to be assessed against all of the professional standards for each dimension?

Yes. The standards have been designed to relate to the activities that most teachers would be expected to carry out in the normal course of their work. This does not mean that a separate monitoring system has to be set up for each standard. In many cases a number of aspects of performance could be assessed concurrently. For example, a classroom observation might cover a range of standards under several dimensions.

In the rare event that a particular standard is clearly not relevant to an individual teacher's role, it is up to their manager to exercise judgement about whether or not that standard should be included.

Can a teacher who is making rapid progress or who has prior experience achieve accelerated progression through having more than one assessment during a year?

No, salary progression is part of an annual cycle and cannot be accelerated.

Can a teacher regress on the salary scale, for example a teacher who has reached their base scale maximum but does not maintain a high level of performance?

No, regression cannot occur. A high level of performance is expected of teachers who have reached the top of the salary scale. A teacher whose performance has deteriorated should be provided with support and development opportunities. Where a teacher does not meet development objectives and performance is of significant and ongoing concern, competence procedures may be considered.

How can a teacher be expected to meet the standard for Contribution to Wider School Activities if family commitments limit the time available for co-curricula activities?

The professional standards are deliberately broad to allow schools to interpret them in a way that reflects their own goals and expectations. "Wider school activities" can cover a broad range of activities, including sharing knowledge, developing resources, participating in cultural events, coaching sports or cultural groups. Many of these activities would occur within the normal working day.

What happens if a teacher's performance is generally satisfactory, but they are experiencing some difficulties with one or two standards?

Consideration should be given to the significance of the problem, for example whether the teacher is finding it difficult to meet individual standards or, in fact, a whole dimension. The teacher's response to the problem, for example working steadily towards improving performance, should also be taken into account. Clearly a temporary lapse in performance would not justify an unsuccessful assessment against the standards.

It is possible that a teacher could be assessed as having met the standards overall, with any areas of difficulty identified as priorities for future development. However, if there is significant concern, salary progression should be deferred until performance has improved. In such cases managers will need to exercise their professional judgement, taking into account the school's policies and procedures.

Teacher Performance Management



What happens if a unit holder meets the teachers' standards at the appropriate level, but does not meet the relevant unit holder standards?

Progression on the salary scale depends upon meeting the teachers' standards at the appropriate level, therefore salary progression would not be affected. However, the teacher should be provided with guidance and support to improve their performance against the relevant unit holder standards.

5. Performance Indicators

Performance indicators provide a way of assessing the extent to which the professional standards have been met. Assessment can take a variety of forms but is typically about gathering evidence that a level of performance has been achieved.

Generic sample indicators have been developed for teachers and unit holders in consultation with schools. The sample indicators and guidelines for their use appear in Appendix 3. The examples demonstrate how professional standards can be translated into measures of performance that are meaningful to schools, and do not reduce roles to a series of mechanical tasks.

Performance indicators will:

- clarify what staff have to do to demonstrate their performance against the professional standards
- help appraisers systematically observe and gather evidence of performance so that decisions about staff achievements are made as fairly and objectively as possible
- enable professional standards to be implemented in a robust and consistent way
- allow schools to apply the professional standards in a way that is consistent with their culture and climate.

The use of indicators is not a requirement, but they are strongly recommended to ensure all parties are clear about when a staff member's performance meets the appropriate level of professional standards.

Developing Performance Indicators

Performance indicators are developed by examining the objectives, inputs, activities and outcomes of the school's strategic plan and programmes. Developing indicators requires the school to:

- identify key aspects of performance (that can be verified)
- determine what information is needed to assess performance against each of the professional standards or set of standards within each dimension
- decide how performance is to be assessed - the assessment method(s)
- design methods for collecting the performance information.

Indicators should be used to assess each dimension of the professional standards. Most dimensions include two or more standards, and it would be reasonable to expect an indicator for each standard. The final number of indicators, however, must be feasible in terms of ease of implementation, and time and cost of data collection.

Principals and teachers will already possess the knowledge required to generate the indicators. Staff involvement in the development process is strongly recommended. This will ensure the indicators are accurate, understood and accepted by all staff. Some ways to approach this are:

- staff and senior management meet and agree on a process for developing performance indicators
- staff are asked to each contribute a short list of things they feel most demonstrate that a teacher is doing their job well. These are pooled and categorised under the professional standards

Teacher Performance Management

dimensions. This list is then divided up by dimension and allocated to small groups of staff who refine their portion of it. Each group's work is collated and distributed, and a final meeting is held to comment and agree on the indicators

- senior management prepares a draft list of indicators, which is presented to staff for comment. The indicators are debated and modifications are made, based on the feedback. The final indicators are agreed by staff
- teachers join groups based on their level of experience ie, beginning classroom, classroom or experienced classroom teachers. Each group nominates a representative. The groups develop indicators appropriate to their level of teaching, and the representatives meet to discuss, collate and refine the results into a final draft. This draft is provided to staff for comment and agreement
- the principal and a small group of teachers collaborate with other local principals and teachers to share resources and ideas to develop indicators
- sample performance indicators in this booklet form the basis for a staff discussion where the most appropriate indicators are selected and customised to suit the particular objectives and characteristics of the school.

Appendix 4 contains case studies demonstrating how two schools developed indicators and integrated the professional standards into their performance management systems.

Performance indicators should be documented and incorporated into the performance management system. Indicators should be reviewed from time to time to ensure they are still relevant and appropriate.

Teacher Performance Management

6. Performance Expectations

A written statement of performance expectations must be completed by the appraiser and each staff member each calendar school year. These statements may be referred to as performance agreements or performance plans.

The performance expectations must now include the following elements for each staff member:

- the professional standards
- a professional development objective(s).

Other elements that can be included are:

- performance indicators appropriate to the staff member for demonstrating achievement of the standards
- additional objectives or standards based on individual need, school priorities, and/or performance concerns.

A job description may also be attached.

Key Steps of the Process

The following is the usual process, however schools may adapt it as required.

- 1. Preparation of Statement of Expectations** - At the beginning of the performance management cycle, usually in January/February. The appraiser and staff member discuss and agree on professional development objectives, and any additional objectives, incorporate all of the professional standards at the appropriate level (including any performance indicators), document the agreement and then set the agreement in motion.
- 2. Interim Appraisal** (optional) - Usually towards the end of the second term. Its purpose is to monitor progress against the professional standards and any additional objectives to highlight successes and address any concerns. Interim appraisal also provides an opportunity to discuss and record any changes to the agreed performance expectations. This review may involve observation of teaching, an interview and preparation of an interim report.
- 3. Final Appraisal** - Usually towards the end of the fourth term, or it may coincide with the staff member's anniversary date. The appraiser and staff member meet to discuss the teacher's performance over the year. The teacher must have completed a self-appraisal. The discussion should focus on the performance expectations, i.e. each dimension of the professional standards (including indicators), development objectives and other objectives or standards. Evidence of performance and information that demonstrates achievement needs to be produced, including observation of teaching. Discussion will also cover what needs to be addressed in the following year in terms of further professional development.

Note: The process described highlights the formal aspects of performance management systems. In reality, there should be ongoing opportunities for discussion, observation and feedback between staff and their appraiser during the regular activities of the school.

Teacher Performance Management



Information about professional standards sometimes refers to assessment against the *appropriate* or *relevant* standards - what does this mean?

These terms generally refer to the appropriate or relevant level of the professional standards i.e. beginning, classroom or experienced teacher. In some contexts however, the terms might refer to a set of standards e.g. the secondary teachers' standards. For unit holders the appropriate or relevant standards are those which relate to their specific responsibilities (unit holders carrying out teaching duties will also be assessed against the professional standards for teachers at the appropriate level).

Our kura kaupapa Māori expects a high level of competence in Te Reo, knowledge of the Treaty of Waitangi and Māori protocols from all teachers. Can we assess all of our teachers at the experienced classroom teacher level of the professional standards that are specific to Māori?

Yes, you can assess performance against a higher level of standards or additional standards that reflect your school's specific requirements. However, standards that vary from the prescribed professional standards (for each level of teaching) cannot be linked to pay progression.

Most of the teachers in our school are non-Māori and we have very few Māori students. Under these circumstances how can non-Māori teachers be expected to meet the Māori components of the professional standards?

Every teacher has a significant influence on the experiences of Māori students within their school. Teachers also have an important role to play in encouraging non-Māori students to respect Māori culture, for instance in pronouncing Māori names and words correctly and developing an understanding of Māori protocols. Guidance, support and advice on good practice in teaching Māori students needs to be available to all teachers and the inclusion of professional standards specific to Māori will help ensure that this occurs.

Should each teacher have a development objective for every standard?

No, that would not be feasible. As part of PMS requirements, boards must ensure that each teacher has at least one development objective during the annual appraisal cycle. It is expected that assessing performance against the standards will enable clearer identification of areas for development.

Teacher Performance Management

7. Assessment Methods

A variety of methods can be developed for assessing or measuring a staff member's performance. Assessment methods must include observation of teaching (for those staff with teaching responsibilities), self-appraisal, and an appraisal interview where the teacher has the opportunity to discuss their achievement of performance expectations and development objectives.

Other methods of assessing performance include:

- peer appraisal, where colleagues are asked to provide feedback on an individual's performance
- parent feedback, either formal or informal
- student feedback, either formal or informal
- students' performance results
- documentary evidence, for example unit or lesson plans, assessment records, resources.

Assessing performance accurately and fairly requires:

- **Having rigour in the assessment process.** This does not mean assessment needs to be complicated or time consuming, but an element of planning is required. Essentially rigour means having a clear idea about the performance expectations and standards against which the assessment is made. For example, asking a staff member to assess their own performance without providing a framework for that assessment would be less valuable than asking them to comment on their performance against the goals they agreed to in their performance expectations.
- **Matching the method of assessment with what is being measured.** Some aspects of performance clearly lend themselves to certain methods of assessment. For example, assessing ability in the development and appropriate use of teaching resources would most obviously be done through observation. Achieving a good fit between what is being measured and the method of assessment will improve the chances of efficiently collecting valid performance information.
- **Using a variety of assessment methods.** The requirements for teachers already stipulate that three methods of assessment are used in assessing performance - observation of teaching, self-appraisal and an appraisal interview. Other methods of assessment may also be appropriate to ensure a complete picture of an individual's performance, depending on the way that your school has decided to assess performance against the professional standards.
- **Agreeing the methods of assessment in advance of the appraisal.** As suggested earlier, it is useful for the staff member and appraiser to agree on the assessment methods that will be used, when performance expectations are discussed at the beginning of the year.

Practical decisions will need to be made when selecting and developing the method of assessing performance, to balance the accuracy of the performance information, with the time and effort it takes to collect the information.

Teacher Performance Management



Do we need to set up a separate monitoring system for each professional standard?

No. It should be possible for several aspects of performance to be assessed simultaneously. For example, classroom observation might encompass teaching techniques, student management, recognition of diversity, and effective communication. It is important that appraisal methods are realistic, feasible and clearly defined at the beginning of the performance management cycle.

Teacher Performance Management

8. Additional Sources of Information

The following sources of information may be helpful:

Ministry of Education booklets:

Performance Management Systems: Performance Appraisal, PMS 1, February 1997

Performance Management Systems: Performance Management: Issues for Rural Schools and Small Schools with Teaching Principals, PMS 2, March 1997

Performance Management Systems: Teacher Registration, PMS 4, July 1997

Performance Management Systems: Appraisal of Teachers in Specialist Positions, PMS 5, November 1997

Professional Standards: Criteria for Quality Teaching, Area School Teachers and Unit Holders, August 1999

Professional Standards: Criteria for Quality Teaching, Secondary School Teachers and Unit Holders, July 1999

Other sources:

“Performance Management in Schools,” *New Zealand Education Gazette*, 12 December 1996

Secondary Teachers Collective Employment Contract 16 June 1999 - 30 April 2001

Area School Teachers Collective Employment Contract 30 June 1999 - 30 April 2001

Handbook: The Registration of Teachers in Aotearoa New Zealand, Teacher Registration Board, 1997

The Capable Teacher, Education Evaluation Report, Number 2, Summer 1998, Education Review Office.

New Zealand School Trustees Association Advisory Service

Ministry of Education Performance Management website

Appendices

The appendices that follow contain sample performance indicators that have been developed in consultation with principals and teachers from a range of selected schools. Schools may use or adapt these examples when considering how to develop indicators or modify existing performance measures. It should be noted that:

- indicators are not compulsory
- the sample indicators are guidelines only
- the number of indicators used, if any, is a school-based decision
- indicators should be reviewed from time to time

Appendix 1 Part 1

Professional Standards for Secondary Teachers - Criteria for Quality Teaching

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Professional Knowledge	<p>Beginning Classroom Teachers have not yet attained full registration. They are working with the advice and guidance of the school towards gaining the expected skills and knowledge of the Classroom Teacher.</p> <p>are expanding knowledge, with advice and guidance in:</p> <ul style="list-style-type: none"> the practical application of curriculum, learning and assessment theory current issues and initiatives in education, including Māori education 	<p>Classroom Teachers have taught for at least two years, have attained full registration and display a high level of competence in the performance of their day-to-day teaching responsibilities.</p> <p>are competent in relevant curricula demonstrate a sound knowledge of current learning and assessment theory demonstrate a sound knowledge of current issues and initiatives in education, including Māori education</p>	<p>Experienced Classroom Teachers are highly skilled practitioners and classroom managers (see clause 2.5.8 of the Secondary Teachers' Collective Employment Contract). They have a highly developed understanding of teaching and learning and, as such, provide highly effective classroom environments and are able to support and provide assistance to teaching colleagues.</p> <p>demonstrate a significant depth of knowledge in the theory and practical application, where appropriate, of:</p> <ul style="list-style-type: none"> curricula relevant to their teaching speciality(ies) learning and assessment theory and developments the current issues and initiatives in education, including Māori education
Professional Development	<p>are receiving professional support and encouragement to successfully:</p> <ul style="list-style-type: none"> participate in available professional development opportunities appropriate to individual needs and school priorities including opportunities relating to the Treaty of Waitangi 	<p>demonstrate a commitment to their own ongoing learning participate individually and collaboratively in professional development activities continue to develop understandings of the Treaty of Waitangi</p>	<p>demonstrate a high level of commitment to:</p> <ul style="list-style-type: none"> further developing their own knowledge and skills encouraging and assisting colleagues in professional development further developing understandings of the Treaty of Waitangi
Teaching Techniques	<p>are, with professional guidance, developing effective strategies in regard to:</p> <ul style="list-style-type: none"> programme planning and assessment design teaching techniques development and appropriate use of teaching resources use of currently-available technologies evaluation and reflection on teaching techniques and strategies 	<p>plan and use appropriate teaching programmes, strategies, learning activities and assessments demonstrate flexibility in a range of effective teaching techniques make use of appropriate technologies and resources impart subject content effectively evaluate and reflect on teaching techniques and strategies with a view to improvement</p>	<p>demonstrate expertise and refined strategies in:</p> <ul style="list-style-type: none"> the development and practice of teaching programmes and resources, learning activities and assessment regimes highly effective teaching techniques evaluation, appraisal and reflection on their own and others' teaching practices with positive outcomes

Appendix 1 Part 1

Professional Standards for Secondary Teachers - Criteria for Quality Teaching

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Student Management	<p>are developing sound understandings and strategies, within the confines of available resources, to:</p> <ul style="list-style-type: none"> manage student behaviour recognise individual learning needs develop positive and safe physical and emotional environments recognise diversity 	<p>manage student behaviour effectively</p> <p>establish constructive relationships with students</p> <p>be responsive to individual student needs</p> <p>develop and maintain a positive and safe physical and emotional environment</p> <p>create an environment which encourages respect and understanding</p> <p>maintain a purposeful working environment</p>	<p>demonstrate expertise and refined strategies in:</p> <ul style="list-style-type: none"> the development and maintenance of environments which enhance learning by recognising and catering for the learning needs of a diversity of students managing student behaviour effectively
Motivation of Students	<p>are receiving professional guidance and demonstrating increasing competence in:</p> <ul style="list-style-type: none"> setting expectations which promote learning effective techniques in student motivation 	<p>engage students positively in learning</p> <p>establish expectations which value and promote learning</p>	<p>demonstrate a high level of effectiveness in:</p> <ul style="list-style-type: none"> encouraging positive school-wide engagement in learning fostering and practising cultures of learning and achievement
Te Reo me ōna Tikanga	<p>are expanding knowledge and developing sound skills, with advice and guidance in:</p> <ul style="list-style-type: none"> accurate pronunciation of basic Māori vocabulary common greetings and waiata basic Māori protocols 	<p>continue to develop understandings and skills in the appropriate usage and accurate pronunciation of Te Reo Māori</p> <p>demonstrate an understanding of basic Māori protocols when opportunities arise</p>	<p>demonstrate commitment to the promotion in education of:</p> <ul style="list-style-type: none"> the appropriate and accurate use of Te Reo Māori the adoption of Māori protocols where appropriate
Effective Communication	<p>are demonstrating, with the support of senior staff, growing ability to successfully:</p> <ul style="list-style-type: none"> communicate effectively with students, families, whānau and caregivers report on student progress share information with colleagues 	<p>communicate clearly and effectively in either or both of the official languages of New Zealand</p> <p>provide appropriate feedback to students</p> <p>communicate effectively with families, whānau and caregivers</p> <p>share information with colleagues</p>	<p>demonstrate particular skill and success in:</p> <ul style="list-style-type: none"> communicating effectively with students reporting on student achievement to students, families, whānau and caregivers inter-staff communications
Support for and Co-operation with Colleagues	<p>are receiving professional support and encouragement to successfully:</p> <ul style="list-style-type: none"> build professional relationships contribute where appropriate to professional development activities 	<p>maintain effective working relationships with colleagues</p> <p>support and provide assistance to colleagues in improving teaching and learning</p>	<p>demonstrate a high level of commitment to:</p> <ul style="list-style-type: none"> encouraging and fostering effective working relationships with and between others providing support and assistance to colleagues where appropriate
Contribution to Wider School Activities	<p>are demonstrating a willingness to be involved in activities which contribute positively to the life of the school</p>	<p>contribute positively to the life of the school and its community</p>	<p>contribute towards the effective functioning of the total school operation, including the school's relationship with parents and the wider community</p>

Appendix 1 Part 1

Secondary School Unit Holders

The following are *indicative* standards to apply to unit holders who have assumed specified leadership, pastoral, administrative or task-specific responsibilities as required by the job description attached to (or describing the responsibilities and tasks attached to) their unit(s). In respect of any classroom teaching duties, they will be assessed against the appropriate level of the professional standards.

In addition, they must meet the following standards, where they are applicable, in respect of their leadership responsibilities. When the following standards do not fully express the key expectations of unit holders, these standards may be amended and/or alternative standards can be adopted with the agreement of the unit holder and the employer. Standards which are not applicable should be disregarded.

Resource Management

- effectively and efficiently use available resources, including financial resources and assets, within delegated authorities, to support learning outcomes for students

Staff and Student Management

- represent and communicate effectively, to a range of audiences, the goals and tasks of the department, faculty or area of responsibility
- participate in and where appropriate contribute to the school's performance management system
- provide effective advice and guidance to other members of the staff
- monitor teacher/student relationships and provide advice and support when required
- communicate effectively with students and staff

Professional Leadership

- understand the aims of and display competence in the area of responsibility
- provide professional leadership to staff within the delegated area(s) of responsibility
- make constructive contributions, where applicable, to the management of the school
- demonstrate a high level of awareness of educational developments and changes, particularly in the area(s) of responsibility
- undertake appropriate professional development to enhance individual expertise in areas of management, administration and education
- identify and act on opportunities for improving teaching and learning
- ensure that procedures for making decisions in the area of responsibility are consistent with national guidelines and with the school's policies
- ensure that changing social and cultural factors affecting the school's community are reflected in the policies and programmes of the delegated area(s) of responsibility
- foster positive relationships between the school and all sectors of the community

Guidance Counsellors and RTLs

- in the case of guidance counsellors and Resource Teachers (Learning and Behaviour) the appropriate standards are applied in the context of their student case work
- the Secretary for Education's PMS 5 notice (November 1997) will apply for reference

Appendix 1 Part 2

Salary Progression Requirements for Secondary School Teachers

Beginning Classroom Teachers

Beginning classroom teachers may have up to two annual assessments against all of the professional standards for beginning classroom teachers (or three if registration is delayed), before being assessed at the classroom teacher level. (At the same time the school must ensure that the beginning classroom teacher is meeting the Teacher Registration Board requirements for registration. These requirements are outlined in Appendix 5).

If the teacher has previous relevant experience or achieves rapid progress they may be assessed against the classroom teacher standards at an earlier date - provided the teacher and principal agree. However, a teacher cannot gain registration or accelerated salary progression through this assessment process.

Classroom Teachers

Teachers will be assessed against the classroom teacher standards when they are fully registered - or after two years in the case of teachers holding Limited Authority to Teach (LAT) status. Classroom teachers may have three annual assessments against all of the classroom teacher standards, unless progression is deferred, or the teacher and their manager agree to apply the experienced classroom teacher standards.

Experienced Classroom Teachers

Experienced classroom teachers are teachers who have progressed beyond the classroom teacher standards. All teachers (including LAT's) will have their performance expectations and professional and personal development goals set against all of the experienced teacher standards when they have reached their appropriate base pay scale maximum. (At the same time the appraisal system will provide information for the renewal of practising certificates - refer Appendix 5).

Progression through the levels of the professional standards

Under normal circumstances, teachers entering the salary scale at the graduate teacher level will have two annual assessments at the beginning classroom teacher level and three annual assessments at the classroom teacher level.

Deferred Progression

The STCEC provides for deferred salary progression. Principals will be able to defer progression for teachers who have not met the professional standards at the appropriate level throughout the assessment period.

If progression is deferred, a timeframe for meeting the professional standards must be agreed by the manager and the teacher. A programme of support and development must be put in place to assist the teacher with meeting the standards. If after a second assessment it is agreed that the teacher is meeting the appropriate level of standards, the increment will be paid effective from the date of attestation. This date will then become the teacher's anniversary date for increment purposes.

Where the teacher has not met the appropriate level of standards the principal will determine whether there are significant areas of concern to warrant initiating competence procedures or whether a programme of further support and development should continue.

Appendix 1 Part 2

Salary Progression Requirements for Secondary School Teachers



The STCEC says that a classroom teacher *may* have three assessments against the classroom teacher standards. Does this mean that assessment against the standards is optional?

No. Assessment against the professional standards at the appropriate level is compulsory for all teachers. The term “may” in the context of the number of assessments at a specific level, allows for variations where teachers have entered the salary scale at other than the graduate teacher level.

Appendix 2 Part 1

Professional Standards for Area Teachers - Criteria for Quality Teaching

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Professional Knowledge	<p>Beginning Teachers meet the Teacher Registration Board criteria for provisional registration as a teacher. Beginning teachers work under the guidance of others. They undertake “advice and guidance” programmes to assist in the development of the competencies required for full registration.</p> <p>are expanding knowledge, with advice and guidance in:</p> <ul style="list-style-type: none"> the practical application of curriculum, learning and assessment theory current issues and initiatives in education, including Māori education 	<p>Classroom Teachers have taught for at least two years, have met the Teacher Registration Board criteria for full registration. Classroom teachers are competent in the performance of their day-to-day teaching responsibilities.</p> <p>are competent in relevant curricula demonstrate a sound knowledge of current learning and assessment theory demonstrate a sound knowledge of current issues and initiatives in education, including Māori education</p>	<p>Experienced Classroom Teachers are highly skilled practitioners and classroom managers. Their teaching methods are well developed and they employ an advanced range of strategies for motivating students and engaging them in learning. In environments where it is possible, they support and provide assistance to colleagues.</p> <p>demonstrate a significant depth of knowledge in the theory and practical application, where appropriate, of:</p> <ul style="list-style-type: none"> curricula relevant to their teaching speciality(ies) learning and assessment theory and developments the current issues and initiatives in education, including Māori education
Professional Development	<p>are receiving professional support and encouragement to successfully:</p> <ul style="list-style-type: none"> participate in available professional development opportunities appropriate to individual needs and school priorities including opportunities relating to the Treaty of Waitangi 	<p>demonstrate a commitment to their own ongoing learning participate individually and collaboratively in professional development activities continue to develop understandings of the Treaty of Waitangi</p>	<p>demonstrate a high level of commitment to:</p> <ul style="list-style-type: none"> further developing their own knowledge and skills encouraging and assisting colleagues in professional development further developing understandings of the Treaty of Waitangi
Teaching Techniques	<p>are, with professional guidance, developing effective strategies in regard to:</p> <ul style="list-style-type: none"> programme planning and assessment design teaching techniques development and appropriate use of teaching resources use of currently-available technologies evaluation and reflection on teaching techniques and strategies 	<p>plan and use appropriate teaching programmes, strategies, learning activities and assessments demonstrate flexibility in a range of effective teaching techniques make use of appropriate technologies and resources impart subject content effectively evaluate and reflect on teaching techniques and strategies with a view to improvement</p>	<p>demonstrate expertise and refined strategies in:</p> <ul style="list-style-type: none"> the development and practice of teaching programmes and resources, learning activities and assessment regimes highly effective teaching techniques evaluation, appraisal and reflection on their own and others’ teaching practices with positive outcomes

Appendix 2 Part 1

Professional Standards for Area Teachers - Criteria for Quality Teaching

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Student Management	<p>are developing sound understandings and strategies, within the confines of available resources, to:</p> <ul style="list-style-type: none"> • manage student behaviour • recognise individual learning needs • develop positive and safe physical and emotional environments • recognise diversity 	<p>manage student behaviour effectively</p> <p>establish constructive relationships with students be responsive to individual student needs</p> <p>develop and maintain a positive and safe physical and emotional environment</p> <p>create an environment which encourages respect and understanding</p> <p>maintain a purposeful working environment</p>	<p>demonstrate expertise and refined strategies in:</p> <ul style="list-style-type: none"> • the development and maintenance of environments which enhance learning by recognising and catering for the learning needs of a diversity of students • managing student behaviour effectively
Motivation of Students	<p>are receiving professional guidance and demonstrating increasing competence in:</p> <ul style="list-style-type: none"> • setting expectations which promote learning • effective techniques in student motivation 	<p>engage students positively in learning</p> <p>establish expectations which value and promote learning</p>	<p>demonstrate a high level of effectiveness in:</p> <ul style="list-style-type: none"> • encouraging positive school-wide engagement in learning • fostering and practising cultures of learning and achievement
Te Reo me ōna Tikanga	<p>are expanding knowledge and developing sound skills, with advice and guidance in:</p> <ul style="list-style-type: none"> • accurate pronunciation of basic Māori vocabulary • common greetings and waiata • basic Māori protocols 	<p>continue to develop understandings and skills in the appropriate usage and accurate pronunciation of Te Reo Māori</p> <p>demonstrate an understanding of basic Māori protocols when opportunities arise</p>	<p>demonstrate commitment to the promotion in education of:</p> <ul style="list-style-type: none"> • the appropriate and accurate use of Te Reo Māori • the adoption of Māori protocols where appropriate
Effective Communication	<p>are demonstrating, with the support of senior staff, growing ability to successfully:</p> <ul style="list-style-type: none"> • communicate effectively with students, families, whānau and caregivers • report on student progress • share information with colleagues 	<p>communicate clearly and effectively in either or both of the official languages of New Zealand</p> <p>provide appropriate feedback to students</p> <p>communicate effectively with families, whānau and caregivers</p> <p>share information with colleagues</p>	<p>demonstrate particular skill and success in:</p> <ul style="list-style-type: none"> • communicating effectively with students • reporting on student achievement to students, families, whānau and caregivers • inter-staff communications
Support for and Co-operation with Colleagues	<p>are receiving professional support and encouragement to successfully:</p> <ul style="list-style-type: none"> • build professional relationships • contribute where appropriate to professional development activities 	<p>maintain effective working relationships with colleagues</p> <p>support and provide assistance to colleagues in improving teaching and learning</p>	<p>demonstrate a high level of commitment to:</p> <ul style="list-style-type: none"> • encouraging and fostering effective working relationships with and between others • providing support and assistance to colleagues where appropriate
Contribution to Wider School Activities	<p>are demonstrating a willingness to be involved in activities which contribute positively to the life of the school</p>	<p>contribute positively to the life of the school and its community</p>	<p>contribute towards the effective functioning of the total school operation, including the school's relationship with parents and the wider community</p>

Appendix 2 Part 1

Area School Unit Holders

<p>The following are <i>indicative</i> standards to apply to unit holders who have assumed specified leadership, pastoral, administrative or task-specific responsibilities as required by the job description attached to (or describing the responsibilities and tasks attached to) their unit(s). In respect of any classroom teaching duties, they will be assessed against the appropriate level of the <i>teacher</i> professional standards. In addition, they must meet the following standards, where they are applicable, in respect of their leadership responsibilities. Standards which are not applicable should be disregarded.</p>
<p>Resource Management</p> <ul style="list-style-type: none">• effectively and efficiently use available resources, including financial resources and assets, within delegated authorities, to support learning outcomes for students
<p>Staff and Student Management</p> <ul style="list-style-type: none">• represent and communicate effectively, to a range of audiences, the goals and tasks of the department, faculty or area of responsibility• participate in and where appropriate contribute to the school's performance management system• provide effective advice and guidance to other members of the staff• monitor teacher/student relationships and provide advice and support when required• communicate effectively with students and staff
<p>Professional Leadership</p> <ul style="list-style-type: none">• understand the aims of and display competence in the area of responsibility• provide professional leadership to staff within the delegated area(s) of responsibility• make constructive contributions, where applicable, to the management of the school• demonstrate a high level of awareness of educational developments and changes, particularly in the area(s) of responsibility• undertake appropriate professional development to enhance individual expertise in areas of management, administration and education• identify and act on opportunities for improving teaching and learning• ensure that procedures for making decisions in the area of responsibility are consistent with national guidelines and with the school's policies• ensure that changing social and cultural factors affecting the school's community are reflected in the policies and programmes of the delegated area(s) of responsibility• foster positive relationships between the school and all sectors of the community
<p>Guidance Counsellors</p> <ul style="list-style-type: none">• in the case of guidance counsellors the appropriate standards are applied in the context of their student case work• the Secretary for Education's PMS 5 notice (November 1997) will apply for reference

Appendix 2 Part 2

Salary Progression Requirements for Area School Teachers

Beginning Classroom Teachers

Beginning classroom teachers will have at least two annual assessments against the professional standards for beginning classroom teachers before moving to the classroom teacher level. (At the same time the school must ensure that the beginning classroom teacher is meeting the Teacher Registration Board requirements for registration. These requirements are outlined in Appendix 5).

If the teacher has previous relevant experience or achieves rapid progress, they may be assessed against the classroom teacher standards after one assessment against the beginning classroom teacher standards - provided the teacher and their manager agree. A teacher cannot gain early registration or accelerated salary progression through this assessment process.

Classroom Teachers

Classroom teachers are fully registered teachers. They will have at least three annual assessments against the professional standards for classroom teachers before moving to the experienced classroom teacher level, regardless of whether or not they have reached their qualifications maximum.

Experienced Classroom Teachers

Experienced classroom teachers are teachers who have had at least three successful annual assessments at the classroom teacher level and who then meet the experienced classroom teacher standards. Experienced classroom teachers will continue to be assessed annually against the experienced classroom teacher standards when they have reached their base scale maxima. (At the same time the appraisal system will provide information for the renewal of practising certificates - refer Appendix 5).

Deferred Progression

The ASTCEC provides for deferred salary progression. Principals are able to defer progression for teachers who have not met the professional standards at the appropriate level throughout the assessment period.

If progression is deferred, a timeframe for meeting the professional standards must be agreed by the manager and the teacher. A programme of support and development should be put in place to assist the teacher with meeting the standards. If after a second assessment it is agreed that the teacher is meeting the appropriate level of standards, the increment will be paid effective from the date of attestation. This date will then become the teacher's anniversary date for increment purposes.

Where the teacher has not met the appropriate standards within the specified time period, the teacher will be required to undergo competence procedures.

Where a teacher disagrees with the deferral of their salary increment the teacher may, within 14 working days of being notified of the deferral, seek a review.

Appendix 2 Part 2

Salary Progression Requirements for Area School Teachers



The ASTCEC says that *Experienced teachers are teachers who have had at least 3 successful annual assessments against the classroom teachers standards.* What does this mean?

New teachers would normally have two successful assessments against the beginning classroom teacher standards and three successful assessments against the classroom teacher standards before reaching the experienced teacher level.

At what level are existing teachers assessed?

Principals and/or managers need to apply their judgement in this area. However, a useful guide may be to take into account the actual years of teaching experience, and apply the appropriate standards at that level. For example, a teacher who has had one year's teaching experience at the time the standards are implemented, would have one successful assessment against the beginning classroom teacher standards before moving to the classroom teacher level.

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers and Unit Holders

The following sample performance indicators have been developed by principals and teachers from selected schools. They demonstrate how the professional standards can be described in terms of behaviours, and therefore assessed. They should be seen as a menu from which a school can select as many or as few indicators as needed. It is important to take into account the culture and special features of a school when selecting performance indicators to ensure they are appropriate. You may wish to develop specific indicators that reflect the special character of your school. For example, an integrated school may choose to add indicators such as the following:

- teaches and takes part in Religious Instruction and the Special Character dimension of the school through reading and professional development courses
- models appropriate Special Character traits in dealings with all students.

Kura kaupapa Māori, bilingual or immersion classes and schools will probably need additional or different indicators to those provided in this document. However, some of the sample indicators will apply for teaching in a kura kaupapa environment.

It is also important to consider specific performance expectations when selecting indicators for individual staff members. For example, some of the sample indicators under the dimension Staff and Student Management for unit holders would only be appropriate for staff who have those responsibilities.

Indicators need to reflect activities that teachers already routinely carry out. The sample indicators provided in this booklet are generic and therefore it is recommended that they are adapted, where necessary, to relate better to specific programmes and systems operating in your school. This will ensure that the language of the performance indicators is consistent with other expectations and documents relevant to teachers, such as job descriptions.

Specific sample indicators have been developed for each dimension of the professional standards. However, some of the examples may be applied to more than one dimension, and your school may choose to use the indicators in this way. For example, an indicator such as *Encourages students to involve families, whānau in their learning* (within the Motivation of Students dimension), could also be used as an indicator of contributing to partnership between the school and the community (under Contribution to Wider School Activities).

In developing the performance indicators for teachers, a common theme has been used to differentiate between the three teacher levels:

1. The performance indicators for **beginning classroom teachers** reflect the need for teachers at this level to focus their time on developing skills as a sound teacher, and requiring advice and guidance from more experienced colleagues to achieve this.
2. The performance indicators for **classroom teachers** reflect a teacher who is fully skilled to perform all aspects of a teaching role with minimal assistance from senior colleagues.
3. The performance indicators for **experienced classroom teachers** reflect a teacher who is highly skilled and able to take on a leadership role by sharing their experiences and skills with less experienced colleagues, as well as performing some additional tasks that contribute to the wider school.

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers and Unit Holders

There are, of course, a number of performance indicators common to all levels of teaching. Under normal circumstances a school would require all teachers, regardless of their level, to demonstrate these behaviours or perform these tasks. These common indicators either reinforce school policy or procedures, for example, *Contributes to the professional development needs/activities of the department*, or are included where it is meaningless to make a distinction between teachers on the basis of experience, for example *Maintains confidentiality and trust*. The sample indicators that are common to all levels appear in bold across the following tables.

Finally, your school may wish to add performance indicators for either teachers or unit holders, which are not based on the professional standards. These may relate to the specific nature of your school and its goals, but may not be used as a basis for determining pay progression for teachers.

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Professional Knowledge <ul style="list-style-type: none"> • Curriculum <ul style="list-style-type: none"> • Learning and assessment theory 	<ul style="list-style-type: none"> • Demonstrates knowledge of the New Zealand curriculum and documents • Demonstrates understanding of knowledge base(s) underpinning curriculum areas/subjects • Uses appropriate range of assessment techniques, with guidance • Demonstrates awareness of the place of assessment in improving student learning • Records assessment outcomes (according to school/dept. policy) • Is familiar with and follows the policies and procedures of the school • Reads in the professional area and discusses with colleagues • Regularly attends department/staff meetings • Explores up-to-date findings in Māori education, e.g. participates in Māori educational forums, reads current literature 	<ul style="list-style-type: none"> • Demonstrates awareness of up-to-date research on curriculum, assessment and learning • Demonstrates up-to-date knowledge of subject(s) and subject pedagogy • Demonstrates awareness of links between curriculum areas • Uses appropriate range of assessment techniques • Able to write assessment tasks that reflect department's objectives (in conjunction with others or across the department) • Uses assessment data to monitor individual students, groups of students, whole cohorts, to improve student learning outcomes • Records assessment outcomes (according to school/dept policy) • Has sound knowledge of and consistently follows the policies and procedures of the school • Reads in the professional area and discusses with colleagues • Regularly attends department/staff meetings • Explores and critiques up-to-date findings in Māori education and discusses with colleagues 	<ul style="list-style-type: none"> • Actively contributes to the review, evaluation and development of schemes of work • Demonstrates awareness of up-to-date research on curriculum, assessment and learning • Demonstrates up-to-date knowledge of subject(s) and subject pedagogy • Clearly demonstrates awareness and understanding of links between curriculum areas in curriculum delivery • Implements assessment procedures as determined by school policy • Able to write assessment tasks for own class and across whole department and critiques assessment tasks that have been set • Uses assessment data to analyse trends and develop strategies in response to identified gaps and needs • Records assessment outcomes (according to school/dept policy) • Has sound knowledge of and consistently follows the policies and procedures of the school • Reads and critiques in the professional area and discusses with colleagues • Regularly attends and contributes to department/staff meetings • Explores and critiques up-to-date findings in Māori education and discusses with colleagues

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Professional Development <ul style="list-style-type: none"> • Individual • Collaborative 	<ul style="list-style-type: none"> • Participates constructively in performance management • Identifies own professional development needs and communicates these to appraiser when establishing performance expectations • Attends teacher development programmes and other professional development activities • Contributes to the professional development needs/activities of the department • Is developing understanding of the Treaty of Waitangi and its principles 	<ul style="list-style-type: none"> • Participates constructively in performance management • Identifies own professional development needs and objectives to improve performance and communicates these to appraiser when establishing performance expectations • Attends teacher development programmes and other professional development activities • Contributes to the professional development needs/activities of the department • Seeks opportunities to further develop and demonstrate understanding of the Treaty of Waitangi and its principles 	<ul style="list-style-type: none"> • Participates constructively in performance management • Identifies own professional development needs and objectives to improve performance and communicates these to appraiser when establishing performance expectations • Attends teacher development programmes and other professional development activities • Contributes to the professional development needs/activities of the department • Further develops and demonstrates understanding of the Treaty of Waitangi and its principles
Teaching Techniques <ul style="list-style-type: none"> • Teaching programmes, resources, learning activities, assessments • Range of teaching techniques • Technology • Evaluation and reflection on teaching techniques and strategies 	<ul style="list-style-type: none"> • Implements curriculum consistent with school/department scheme • Is aware of and uses suitable resources (as and where available) when required with the support of the HOD • Uses a range of teaching techniques • Demonstrates understanding of the impact of teaching style and resources to meet students' cultural and individual learning needs. • Plan book and/or samples of student work match the required curriculum specification • Uses appropriate technologies • Reflects on own teaching approaches and techniques and seeks advice to improve/develop 	<ul style="list-style-type: none"> • Recognises different levels of student ability and delivers curriculum as appropriate • Contributes to the development of resources and uses a wide range of suitable resources • Effectively uses a range of teaching techniques • Teaching style and resources display awareness of students' cultural and individual learning needs • Plan book and/or samples of student work match the required curriculum specification • Uses appropriate technologies • Reflects on own teaching approaches and techniques and takes action to improve/develop 	<ul style="list-style-type: none"> • Recognises different levels of student ability and delivers curriculum as appropriate, and provides guidance and assistance for colleagues • Contributes to the development and maintenance of resources and uses a wide range of resources • Effectively uses a wide range of teaching techniques • Consistently demonstrates a teaching style and utilises resources that take into account students' cultural and individual learning needs • Plan book and/or samples of student work match the required curriculum specification • Uses appropriate technologies • Reflects on own teaching approaches and techniques and takes action to improve/develop • Appraises teaching of colleagues and assists others to improve their teaching practices

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
Student Management <ul style="list-style-type: none"> Managing student behaviour Response to individual needs Response to diversity Positive and safe physical and emotional environment 	<ul style="list-style-type: none"> Maintains a comprehensive record of each student's attendance Implements school behavioural guidelines and expectations and is aware of support systems. Seeks, and responds positively to, advice on student management Is working to establish clear classroom routines Reflects student's concerns and is approachable Respects the rights of students to have their own beliefs and values Encourages students to value and appreciate each other Assesses risk to student's physical, cultural and emotional safety and seeks guidance about appropriate action 	<ul style="list-style-type: none"> Maintains a comprehensive record of each student's attendance Implements school behavioural guidelines, expectations and support systems Establishes clear and effective classroom routines Reflects student's concerns and is approachable Respects the rights of students to have their own beliefs and values Encourages students to value and appreciate each other Assesses risk to student's physical, cultural and emotional safety and takes appropriate action 	<ul style="list-style-type: none"> Maintains a comprehensive record of each student's attendance Implements school behavioural guidelines, expectations and support systems Actively contributes to the ongoing development of support systems and supports colleagues Establishes clear and effective classroom routines Reflects student's concerns and is approachable Respects the rights of students to have their own beliefs and values Encourages students to value and appreciate each other Assesses risk to student's physical, cultural and emotional safety and takes appropriate action
Motivation of Students <ul style="list-style-type: none"> Engage students positively in learning Establishes expectations which value and promote learning 	<ul style="list-style-type: none"> Seeks, and responds to, advice on strategies/applies a variety of strategies to keep students on task, in a positive atmosphere Evidence of working towards providing a variety of relevant activities to suit different learning styles and levels Encourages students to take responsibility for their own learning Encourages students to involve families, whānau in their learning Articulates high expectations for all students 	<ul style="list-style-type: none"> Applies a variety of strategies to keep students on task, in a positive atmosphere Frequently provides a variety of relevant activities to suit different learning styles and levels Encourages students to take responsibility for their own learning Encourages students to involve families, whānau in their learning Articulates high expectations for all students 	<ul style="list-style-type: none"> Applies a variety of strategies to keep students on task, in a positive atmosphere and provides support and assistance to colleagues Provides a variety of relevant activities to suit different learning styles and levels and provides support and assistance to colleagues Encourages students to take responsibility for their own learning Encourages students to involve families, whānau in their learning Articulates high expectations for all students

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
<p>Te Reo me ōna Tikanga</p> <ul style="list-style-type: none"> • Pronunciation and usage • Māori protocols 	<ul style="list-style-type: none"> • Pronounces and uses Māori names and words correctly, where appropriate • Develops Māori language knowledge appropriate to the learning area • Incorporates elements of te reo and tikanga Māori into lessons and classroom with some guidance • Participates in Māori cultural events and developing understanding of local protocols, tikanga and kawa, where relevant 	<ul style="list-style-type: none"> • Pronounces and uses Māori names and words correctly, where appropriate • Develops Māori language knowledge appropriate to the learning area • Incorporates elements of te reo and tikanga Māori into lessons and classroom • Participates in Māori cultural events and developing understanding of local protocols, tikanga and kawa, where relevant 	<ul style="list-style-type: none"> • Pronounces and uses Māori names and words correctly, where appropriate • Develops Māori language knowledge appropriate to the learning area • Incorporates and continually seeks further ways to incorporate elements of te reo and tikanga Māori into lessons and classroom • Participates in Māori cultural events and developing understanding of local protocols, tikanga and kawa, where relevant
<p>Effective Communication</p> <ul style="list-style-type: none"> • Students • Colleagues • Families/whānau 	<ul style="list-style-type: none"> • With guidance, observes school communication policies and procedures • Spoken and written language is clear, correct and appropriate • Demonstrates effective listening skills • Communication is open, constructive, accurate and timely • Maintains confidentiality and trust • Seeks guidance and support to conduct meetings in appropriate environments and is learning to use appropriate protocols e.g. mihi, karakia, waiata 	<ul style="list-style-type: none"> • Observes school communication policies and procedures • Spoken and written language is clear, correct and appropriate • Demonstrates effective listening skills • Communication is open, constructive, accurate and timely • Maintains confidentiality and trust • Seeks guidance and support to conduct meetings in appropriate environments and is learning to use appropriate protocols e.g. mihi, karakia, waiata 	<ul style="list-style-type: none"> • Observes school communication policies and procedures and provides guidance and assistance to colleagues • Spoken and written language is clear, correct and appropriate • Demonstrates effective listening skills • Communication is open, constructive, accurate and timely • Maintains confidentiality and trust • Supports colleagues in communicating effectively and appropriately • Conducts meetings in appropriate environments and facilitates use of appropriate protocols e.g. mihi, karakia, waiata

Appendix 3

Sample Performance Indicators for Secondary and Area School Teachers

Dimension	Beginning Classroom Teachers	Classroom Teachers	Experienced Classroom Teachers
<ul style="list-style-type: none"> • Support for and Cooperation with Colleagues • Effective working relationships with colleagues • Support and assistance to colleagues in improving teaching and learning 	<ul style="list-style-type: none"> • Meets scheduled requests for information in a timely fashion • Establishes effective relationships with colleagues • Contributes where appropriate (or possible) to department by assisting with subject resource development and maintenance. • Shares in test and examination preparation as appropriate 	<ul style="list-style-type: none"> • Meets scheduled requests for information in a timely fashion • Maintains effective relationships with colleagues • Contributes to department by assisting with subject resource development and maintenance. • Shares in test and examination preparation 	<ul style="list-style-type: none"> • Meets scheduled requests for information in a timely fashion • Promotes effective relationships with colleagues • Oversees subject resource development and maintenance. • Leads in test and examination preparation
<ul style="list-style-type: none"> • Contribution to Wider School Activities 	<ul style="list-style-type: none"> • Becomes familiar with the school's policies and programmes • Participates in activities that benefit colleagues or the school as a whole • Actively supports co-curricular activities as negotiated • Shares in playground/ duties outside the classroom and undertakes supervision duties 	<ul style="list-style-type: none"> • Comments on proposed modifications to and development of, the school's policies and programmes • Participates in activities that benefit colleagues or the school as a whole • Actively supports co-curricular activities as negotiated • Shares in playground/duties outside the classroom and undertakes supervision duties • Contributes to partnership between the school and the community 	<ul style="list-style-type: none"> • Comments on and contributes to proposed modifications to and development of, the school's policies and programmes • Participates in activities that benefit colleagues or the school as a whole • Actively supports co-curricular activities as negotiated • Shares in playground/duties outside the classroom and undertakes supervision duties • Contributes to partnership between the school and the community

Appendix 3

Sample Performance Indicators for Secondary and Area School Unit Holders

Professional standards (Unit Holders)	Sample performance indicators
<p>Resource Management</p> <ul style="list-style-type: none"> Effectively and efficiently use available resources, including financial resources and assets, within delegated authorities, to support learning outcomes for students. 	<ul style="list-style-type: none"> Manages within allocated budget Consults staff about purchase of resources Resources are effectively allocated and reflect departmental goals/plan Resources are up-to-date, appropriate to course(s) Systems are in place for efficient management of resources e.g. information, booking systems, instructions for use, accessibility, budget planning Available resources are focused on areas that have the greatest benefit to student learning outcomes
<p>Staff and Student Management</p> <ul style="list-style-type: none"> represent and communicate effectively, to a range of audiences, the goals and tasks of the department, faculty or area of responsibility communicate effectively with students and staff participate in and where appropriate contribute to the school's performance management system provide effective advice and guidance to other members of the staff monitor teacher/student relationships and provide advice and support when required 	<ul style="list-style-type: none"> Communicates clearly and concisely e.g. in management document, departmental minutes, explanations to board, staff, students, parents as appropriate Evidence of general understanding by audience e.g. through feedback, departmental minutes, questionnaires, assessment, surveys Systems in place to ensure staff are following policies set out in management documents e.g. appropriate use of resources/methods Undertakes classroom observation and views student work books Evidence of practice reflects effective advice and guidance provided e.g. in classroom management, assessment, resources Provides effective, targeted and ongoing assistance to beginning teachers Undertakes student and staff surveys, observation, comments on reports

Appendix 3

Sample Performance Indicators Secondary and Area School Unit Holders

Professional standards (Unit Holders)	Sample performance indicators
<p>Professional Leadership</p> <ul style="list-style-type: none"> • Understand the aims of and display competence in the area of responsibility • Provide professional leadership to staff within the delegated area(s) of responsibility • Make constructive contributions, where applicable, to the management of the school • Demonstrate a high level of awareness of educational developments and changes, particularly in the area(s) of responsibility • Undertake appropriate professional development to enhance individual expertise in areas of management, administration and education • Identify and act on opportunities for improving teaching and learning • Ensure that procedures for making decisions in the area of responsibility are consistent with national guidelines and with the school's policies • Ensure that changing social and cultural factors affecting the school's community are reflected in the policies and programmes of the delegated area(s) of responsibility • Foster positive relationships between the school and all sectors of the community 	<ul style="list-style-type: none"> • Tasks identified in job description/project plans are met in a timely, appropriate manner • Proactively leads and assists staff to improve their skills in teaching and learning approaches, shares ideas • Acts as a role model for staff on professional teaching practice through classroom modelling • Participates as an effective member of the school management team • Actively supports decisions taken by the principal or school management team • Keeps up to date with current management and professional practice processes through reading and training • Actively seeks opportunities to improve knowledge and skills • Contributes to professional debates both within and beyond the school • Ensures programmes reflect the school's policies and special characteristics • Considers and recommends ways the school's programmes and policies need to be modified in response to cultural, social, demographic and economic changes e.g. regarding ethnic groups, refugees, technology • Curriculum addresses learning needs of students/community • Maintains a positive relationship with school and wider community
<p>Guidance Counsellors and RTLs (the professional standards do not apply for RTLs in area schools)</p> <ul style="list-style-type: none"> • Guidance counsellors • Resource teachers (learning and behaviour) - (secondary schools only) 	<ul style="list-style-type: none"> • Is a member of a professional organisation; or abides by a professional code of ethics and participates in external professional supervision • Maintains confidentiality • Fulfils legal obligations e.g. reports abuse • Alerts principal to concerns e.g. drug abuse, increases in eating disorders etc • Develops and maintains networks with relevant agencies and the community, including the Māori community • Evidence of effective/appropriate individual learning programmes • Positive feedback from cluster schools

Appendix 4

Integrating Professional Standards - Case Studies

CASE STUDY 1

The principal of a co-educational secondary school describes how he and his staff have started to develop a process to incorporate the professional standards into their performance management system. The decile 8 school, is part of an urban satellite community and has 900 pupils. The school is undergoing a thorough review of its strategic plan under a new principal.

“ There is a strong desire in the school to link professional development and performance appraisal with the school’s strategic plan and annual goals. I see the introduction of the professional standards as an opportunity to reinforce those links by reviewing the existing peer appraisal system and developing an integrated approach to performance management.

While professional standards are an external requirement, we are determined to ensure that:

- the system we use is consistent with the ethos and goals of the school;
- we measure what we value; and
- the appraisal process focuses on our professional development priorities.

We are committed to developing a high trust, moderate risk model that is transparent and consistently applied. Everyone needs to be involved and take ownership of the process.

We intend to use performance indicators as they:

- are useful to clarify our purposes;
- establish consistency of interpretation; and
- are negotiable and will be reviewed over time.

We will personalise the sample performance indicators to suit our objectives. In consultation with the full staff, we will develop a set of indicators for each of the three levels of teaching. However, while our own goals are critical to the effectiveness of the system, we need to remember that we are accountable for performance against the professional standards and our indicators need to cover those requirements.

We have developed a template to document each teacher’s performance assessment. Both the teacher (self appraisal) and their manager (assessment) will use the template to record their findings, and those documents will provide the basis for discussion at the formal performance appraisal meeting. (A sample from the draft beginning classroom teacher template appears at the end of this case study).

Our new performance management structure requires senior managers to appraise the performance of heads of department (HODs) against the experienced classroom teachers’ standards, and the HODs will each take responsibility for the assessment of between three and six teachers. We are going to carry out a trial run of the new appraisal model as soon as possible. Starting with assessment of HODs, the process for the trial will be:

1. senior manager and HOD meet to agree performance expectations and development objectives, including the professional standards and indicators (how performance will be measured)
2. HOD completes self appraisal (using template)

Appendix 4

Integrating Professional Standards - Case Studies

3. senior manager completes assessment of HOD (using template)
4. both parties meet formally to discuss their findings
5. senior managers and HODs meet to evaluate the process and outcomes and agree on any modifications
6. steps 1-4 repeated for all teachers
7. all staff participate in evaluation of the process

The trial run will help ensure that we are ready to go by the beginning of 2000. It will allow time for experienced classroom teachers to address any issues and have a follow-up assessment before attestation is required in April 2000. Involving staff in the trial and evaluation will help them to have confidence in the process and ensure that we develop a model that works for our school.”

Model template for beginning classroom teachers

<i>Professional Standards</i>	<i>Evidence Indicators</i>	<i>Y/N</i>	<i>Assessment</i>
Professional Development Are receiving professional support and encouragement to successfully: <ul style="list-style-type: none"> • Participate in available professional development opportunities appropriate to individual needs and school priorities including opportunities relating to the Treaty of Waitangi 	<ul style="list-style-type: none"> • Attends teacher development programmes and other professional development activities consistent with negotiated annual goals • Participates in opportunities provided by the school to enhance understanding of the principles of the Treaty of Waitangi and the educational responsibilities that follow 		

Appendix 4

Integrating Professional Standards - Case Studies

CASE STUDY 2

The principal of an area school describes how they developed their existing standards-based performance management system, and how he and his staff plan to incorporate the professional standards. The decile 5 school has 500 students from a range of urban and rural communities.

“During 1998 we redeveloped our appraisal process. Up to this time the process had been largely summative and based on the TRB guidelines. We were aware that professional standards had been introduced for primary schools and that they would eventually be introduced for area and secondary schools, so we used the primary standards as a basis for our new system. Early in the redevelopment we decided to separate the attestation (summative) and appraisal (formative) processes.

The review was facilitated by two contractors (as an area school, we could apply for assistance from both primary and secondary providers). The development process occurred in three phases:

1. **the secondary contract provider** worked initially with a full staff meeting, and then with senior management on overall development;
2. **the primary contract provider** worked with a full staff meeting and then in sessions with groups of staff - both on-site (process development) and off-site (skills development); and
3. **school-based meetings** were held to develop the details of the documentation.

The school-based meetings involved taking the primary professional standards, interpreting and restating them where necessary, and developing indicators for the documentation. We developed the following assessment form to provide a self-analysis continuum, with space for comments by the appraiser:

<i>Assessment template</i>			
<i>Professional Knowledge</i>			
Standard	Indicator	Self Analysis always, - never happens	Comment on Performance
Curriculum	<ul style="list-style-type: none"> • Department scheme is followed • Curriculum knowledge is continually updated • Involvement in curriculum development is demonstrated 	←————→	

The process we followed worked well as a way to introduce standards into our performance management system. As a small school it was helpful to have external facilitators. It was also an advantage to involve all staff as it enabled them to understand and have a say in the system that effects them all.

Appendix 4

Integrating Professional Standards - Case Studies

Because we already have a standards-based system in place, it will be relatively straightforward to adapt it to incorporate the area teachers' professional standards. We will be able to continue using our assessment template and many of our existing indicators. We will need to ensure that all of the new standards are covered, that the standards for unit holders are included and redesign the system to build in the three levels of teaching. In addition, we may also need to review our separate attestation and appraisal processes to ensure that we avoid duplication. This development process will be undertaken towards the end of this year, ready for implementation in 2000.

The professional standards are seen as a useful guide for the appraisal and attestation processes, which together contribute to the overall performance management function. It is not easy to develop clear indicators for all criteria - this will require ongoing development - and there are some specific areas that we may wish to add in terms of our own school culture."

Appendix 5

Teacher Registration Board Requirements¹

The Education Amendment Act 1996 requires teachers in schools (except kura kaupapa) to be registered as teachers *and* to hold a current practising certificate. It is illegal to employ or be employed as a teacher in a school (except kura kaupapa) without a current practising certificate. Teachers and/or the board or employer can be fined up to \$2,000 where a teacher is employed without a practising certificate.

Practising certificates are issued for a term of three years. Renewal of practising certificates requires every registered teacher to complete a Teacher Registration Board (TRB) Practising Certificate Renewal Form TRB7. Principals and senior registered teachers must be aware of the process and criteria for the renewal of practising certificates to ensure registered teachers in their schools are informed.

All registered teachers are advised by the TRB that their practising certificate needs to be renewed at least two months prior to the expiry of their certificate. If a teacher does not have their practising certificate renewed, the TRB may view their registration as being expired.

Registered teachers need to:

- Check the expiry date of their practising certificate.
- Advise the TRB of any change of address and, if necessary, request a renewal form (TRB7).
- Complete the renewal form, ensure their principal, employer or senior registered teacher has affirmed they still meet the “satisfactory teacher” dimensions and have undertaken appropriate professional development.
- Return the completed TRB7 form and appropriate fee to the TRB at least one month prior to expiry of their current certificate.

Criteria for renewal

- Minimum period of teaching service in New Zealand in the previous five years.
- Affirmation by a principal or senior registered teacher, that a teacher is still “satisfactory” to teach.
- Affirmation that professional development has been undertaken

Minimum period of teaching service

The standard requirement is two years uninterrupted teaching in the last five years, although the TRB may accept shorter periods. Intermittent and relief teaching may be acceptable. If there is a question about meeting this requirement, the teacher should contact the TRB.

Still “satisfactory to teach”

The “satisfactory” teacher dimensions should be part of the ongoing performance management or appraisal system, and there should be no need to have a special appraisal at the time the practising certificate is being renewed.

If the principal or senior registered teacher is *unable* to confirm the teacher is still “satisfactory to teach” because they do not know the teacher sufficiently well, no affirmation should be made. If no other appropriate person can make the affirmation by the time the certificate expires, the TRB may grant an extension of time. In such cases advice should be sought from the TRB.

¹ Information provided by the Teacher Registration Board and NZEI Te Riu Roa

Appendix 5

Teacher Registration Board Requirements

If the principal or senior registered teacher is *unwilling* to confirm a teacher is still “satisfactory to teach”, this must be addressed at the school level through established procedures. Employment contracts containing competency procedures must be worked through.

Refusal, to affirm that a teacher is still “satisfactory to teach” cannot be used to shortcut or circumvent the legal provisions in employment contracts. The TRB would expect that if a principal, senior registered teacher or board chair refuses to sign a renewal either:

- 1) a formal review process would have begun in the school;
- 2) such a process is due to begin.

Where a teacher is not currently teaching, affirmation that the teacher is still “satisfactory to teach” and has undertaken professional development must be made by the teacher’s previous principal, employer or senior registered teacher.

Professional development

Professional development is part of normal activity in schools and should be part of ongoing professional practice. All teachers, whether employed full-time or intermittently, should be able to demonstrate they have undertaken professional development. If there are difficulties meeting this requirement, contact the TRB.

Provisional and subject to confirmation registration

Students who graduate from an approved programme of teacher education who apply successfully for registration can be provisionally registered. Experienced teachers who have not taught in New Zealand for 2 out of the last 5 years are registered subject to confirmation. These teachers can be recommended for full registration by the principal, or senior teacher as soon as they have met the following conditions:

Provisionally registered teachers

- 2 years teaching, in minimum blocks of a term, with a teaching load of at least 12.5 hours per week.

Teachers registered subject to confirmation

- At least 3 months (from date of registration) of continuous teaching or after 12 months of intermittent teaching. There are no minimum weekly teaching hours.

Teachers registered either provisionally or subject to confirmation who:

- have been employed as a teacher in New Zealand in the general education system or in institutions approved by the TRB
- have participated in an appropriate advice and guidance programme for the period under the supervision of a fully registered teacher
- have been appraised by their supervising teacher in accordance with the TRB satisfactory teacher criteria
- hold a current practising certificate.

Appendix 5

Teacher Registration Board Requirements

Additional information

If there is any doubt or concern about the renewal process, contact the TRB immediately. Any delay could create unnecessary confusion or inconvenience.

A range of handbooks are available free of charge from the TRB by sending a self addressed A4 envelope. These include:

Handbook: The Registration of Teachers in Aotearoa New Zealand

Information for Employing Authorities

A Satisfactory Teacher and Renewing a Practising Certificate.

Requests for information can be left on TRB voicemail at any time. Further information, including application forms, is available on the Internet.

Teacher Registration Board

PO Box 5326

Wellington

Phone: 04 471 0852

Fax: 04 471 0870

Email: mail@trb.govt.nz

Internet: <http://www.trb.govt.nz>

Teacher Performance Management

Glossary

Annual assessment: See performance appraisal.

Appendix G: Quality teaching criteria in the previous STCEC, used as a base for assessing teachers' progress in relation to pay progression, competency and professional development. Appendix G has now been replaced by the professional standards.

Appendix 5: Quality teaching criteria in the previous ASTCEC, used as a base for assessing teachers' progress in relation to pay progression, competency and professional development. Appendix 5 has now been replaced by the professional standards.

Appraiser: The person (either the principal or person delegated) responsible for appraising the performance of staff.

Dimensions: Clusters of professional standards related to a generic aspect of performance, for example teaching techniques.

Key performance areas: Teaching responsibilities, school-wide responsibilities and management responsibilities required as part of the introduction of performance management systems.

Performance appraisal: Annual assessment of an individual's performance against the professional standards and the tasks or objectives set or agreed at the beginning of the cycle in the written statement of performance expectations, including development objectives.

Performance agreement: An undertaking between two parties about the tasks to be performed and the results expected, including aspects such as development objectives, performance criteria, appraisal dates (not mandatory for teachers).

Performance expectations: An undertaking between two parties about the professional standards, the tasks and objectives to be performed, and the objectives to be achieved (required for all teachers).

Performance indicators: Measures of performance that can be identified and assessed.

Performance management: The process of identifying, evaluating and developing the performance of school staff, so that the goals and objectives of the school are more effectively achieved, while at the same time benefiting staff in terms of recognition, receiving feedback, catering for work needs, providing opportunities for personal and professional development and offering career guidance.

Performance objectives: Statement of intended results that are usually expressed in measurable terms and are time bound.

Performance plan: See *performance expectations*.

Professional development: Activities that are designed to develop further understanding or expertise.

Professional development objective: Intended improvements in professional understanding or expertise.

Professional standards: Descriptions of knowledge, skills and attitudes needed to perform a particular role effectively.