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Individual Action Planning in Initial Teacher Training

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Action Plans and Action Planning are appearing everywhere in educational circles. For many, it was probably school development plans¹ that brought the phase to the forefront, although in work-related training schemes initiated through the Employment Department, the practice of Individual Action Planning has been common currency for some time. The Confederation of British Industry,² the Careers Service information,³ the joint White Paper presented to parliament by the Secretaries of State for Education and Science, Employment, and Wales in May 1991 — Education and Training for the 21st Century⁴ have all served to raise the profile of Individual Action Planning over the last few years.

This paper attempts to explore the concept of Individual Action Planning and to indicate how the process is being used by one university in the initial training of teachers. Finally it looks at some likely future developments and the part that Individual Action Planning can play in bridging the transition from Initial training to induction and into the continuous professional development of teachers.

The concept of Individual Action Planning

Individual Action Planning involves both a process and a product.

As may be inferred from the name, a plan of action is produced which is pertinent, relevant and significant to a particular individual at the time it is produced. This product — the Individual's Action Plan — states what action will be taken by that individual and by when it shall have been taken. The process of Individual Action Planning leads to the production of that plan. However, this short description does not do justice to the total concept.

We all make plans. They may range from fantasies and wildest dreams to the detailed step by step planning necessary when going on a complex journey. However, in the context of education and training, the process and practice of Individual Action Planning always involves guidance from and negotiation with a knowledgeable other. The process is underpinned by a comprehensive tutoring process. It is not casual, haphazard or informal, but

takes place in a regular and systematic way, within a supportive and structured tutorial framework.

Ashworth (1990)⁵ in an unpublished paper defined Individual Action Plans as:—

'A statement of learning need derived from a comprehensive counselling and guidance process'

To this working definition he later inserted:— 'and the means of meeting that learning need'⁶ recognising the outcome of the 1:1 discussion should include a consideration of how the expressed need could best be met and who might help to meet it.

This working definition has come to include a time dimension too, so that not only is there a prioritising of targets but also an indication of dates for meeting them and what has to be done in order to reach them.

In addition the language used to describe Action Plans and Action Planning has evolved. Action Plans are statements expressing intent. They may have academic, vocational and/or personal dimensions. They express an individual's targets for themselves over the next phase of their development. This phase may be of variable duration, and the purpose of the Plan will determine its nature.

Action Planning is a way in which individuals can manage their learning. It gives them a degree of responsibility for and control over what they do. By having negotiated targets, it prioritises their use of time. It gives a framework that they themselves have helped produce — and hence an ownership — within which their learning and development may proceed.

There has been some discussion on the stages or components of the Action Planning process, and how the process relates to the recording of achievement. Both recording achievement and action planning are part of a continuous on-going process of planning, doing and reviewing. Just where the cycle is broken into is relatively unimportant. All three components are essential to effective management of learning, although, if pressed, I would argue that the planning process drives the cycle. In order to plan properly you first need to

know where you are going; you then need to ascertain where you are; then to consider the various routes open to you; then to choose a route bearing in mind any constraints or particular needs or wants; then to travel the chosen route, with the help of people and/or agencies available, to your chosen destination. Once there you might well take stock and evaluate your progress, consider the route taken and then plan for the next phase of the journey. I have found that when people are asked on what sorts of occasions they take stock of what they can do or when they review their achievements, it is often when they have first considered a career move, a change of direction or are contemplating some such alteration in their pattern of existence. They are moved to consider their present, existing levels of expertise by the stimulus of a possible change.

This leads to another related point. School reports have usually been end of year documents, and from my knowledge of the NRA in schools, it too is viewed as an end of schooling document. In a way this is not surprising, for looked at from the teachers' perspective it is the time when their responsibility for the development of their pupils is ending. They are passing the torch to others, whether in training, employment, further or higher education. But for the student, it is a beginning rather than an end. It is the start of their training or their employment, their higher or further education. Development should be looked at from the perspective of the individual who is the continuous element, rather than from the perspective of the school teachers, the training providers etc., who are discontinuous elements moving in and out of the life of the individual. Taking this perspective might help eradicate the unhelpful idea of a summative record. All records are transitory; they may be summaries of developments and achievements up to the present — but even tomorrow they may be different.

The rhetoric of life long learning has been around for a long time, but there are signs that there is now a reality to the idea. Insofar as the training of teachers has been concerned, the connections between Initial Training and the first year of teaching have been extremely tenuous. This is changing. In addition, although the provision of INSET opportunities for serving teachers has in some places been generous, there is slim evidence that the INSET provided has been meeting the needs. By and large, the INSET has been provision-led and course-led rather than individual needs-led. There

have been few opportunities for individual teachers to express their needs and for these to be fed through a system that responds to them. The advent of school development planning and of appraisal, are helping to change this situation.

Individual Action Planning in Initial Teacher Training — One University's Experience

The entrants to courses of post-graduate Initial Teacher Training are becoming more diverse. They are no longer, if they ever were, only the new graduates following the school — Higher Education — school route into the profession. More are mature entrants and many have undertaken other full-time employment before embarking on their Initial Teacher Training (ITT). Certainly almost all will have done part-time or vacation work of some sort and as a result of the totality of their experiences so far, bring with them to their ITT year many and varied skills and competences.

They begin their ITT from different points. They have different expectations. They have different needs. It seems right that these matters should be recognised and built upon from the beginning of the year. Forcing them all through the same experiences, even though they will certainly take different things from them, seems hardly justifiable.

The emphasis has shifted from the Course to the individual. This has been helped by the firming up of the expected outcomes that those leaving Initial Teacher Training should meet, and, in some places, by the partnership schemes between schools in the region and the Schools of Education⁷ in the initial training of teachers.

During the ITT being described, each student meets a tutor four times over the year for a 1:1 Progress Tutorial. Each tutorial takes about thirty minutes. The first of these, early in October, is an entry tutorial where the skills and competences that each person is bringing to the training are discussed. To aid this, students bring to the tutorial a partially completed planning sheet (Fig. 1). The evidence that the skills they describe is examined and then targets are negotiated for the next phase of the training. At present, these Progress Tutorials, which result in negotiated Individual Action Plans, take place in association with the Professional component of the ITT, which is described in more detail below, but working groups of subject tutors and school teachers are presently engaged in developing them for use in the subject areas and on teaching practice.

University of Leicester • School of Education
PGCE Secondary Course • Individual Action Planning Sheet No.

Student _____ Tutor _____

— Review

— Action Plan

Signed:

Student _____

Tutor _____ Date _____

For guidance on completion of this sheet,
please consult your 'Individual Action Plan Cover Sheet'

Fig. 1

The three major components in the initial training, each of which is either entirely or largely school-based are:

Professional Studies, which focuses on ten topics central to the needs of all newly qualified teachers (Fig. 2). These ten topics are produced in distance learning, resources based learning or individualised learning formats and consist of activities that are largely to be undertaken in the Partnership school — either singly or in groups, and readings and references to readings relevant to the topic. Some of the topics have associated talks or visits. The Professional Studies topics fall into three categories. There are those which concentrate on classroom issues, those on whole school matters and those on issues beyond the school. While there is an underpinning philosophy to the sequencing, students can and do work on several topics at the same time and pick them up and return to them as the year progresses. Students keep a log of their

reading and activities in their Record of Professional Studies (Fig. 3), inside which are ten sheets, one associated with each of the Professional Course topics (Fig. 4). As the year unfolds, this record builds up and each sheet acts as a Contents page to a section of their accumulating and growing file of work.

Students undertake Professional Studies in mixed subject groups (known as Partnership Groups) of about 16 and spend one day each week in their Partnership school addressing issues relevant to the ten topics. Each Partnership Group is tutored by a Link Tutor from the School of Education who links with the Professional Tutor in the Partnership school. It is the Professional Tutor in the school who acts as the key communication centre and networker, putting students in touch with teachers in the school who can best help meet their current concerns and IAP targets.

Subject Studies, which as the name indicates, address those matters to do with the learning and teaching of a named subject at the secondary age range. People with degree qualifications in a subject are rarely well equipped to guide and promote its learning in others. In any case, what passes as school Science as defined by the National Curriculum or an A level examination board, bears scant resemblance to what may have been pursued by an undergraduate following a degree in microbiology or genetics. Equally, what passes as genetics at one higher education institution may be very different from what constitutes the study of genetics at another. In subject studies too, people come with different knowledge, understandings, skills and competences, different expectations and different needs. These are strengths to be built on, for collectively, the group is better than any single individual. Individual Action Planning is presently being developed within each subject area. One day each week is spent in twos or threes, in the Partnership school focusing on matters specifically to do with the learning and teaching of the special subject. A second day is spent on Subject Studies at the School of Education, except during the block teaching practices.

Block teaching practice, of which there are two over the year. The first of these is normally undertaken in the Partnership school and the second in a different school which gives additional experiences and learning opportunities to the student. Figure 5 gives the outline format of the Initial Training year.

Professional Topics

1. **Positive discipline and good relationships in the classroom**
class management; behaviour of groups; making sense of others' advice
2. **Promoting equal opportunities for all learners**
for girls and boys; for different racial and cultural backgrounds
3. **An effective use of information technology**
your skills on entry and on completing the PGCE programme
4. **Helping learners and assessing and recording their progress**
the individual learner; groups of mixed ability and attainment; particular teaching/learning methods; principles of assessment and record keeping
5. **Whole school responsibilities in basic skills**
teaching basic skills in all areas of the curriculum; information skills; language skills; provision for all children with special needs
6. **The cross-curricular themes of the national curriculum**
economic awareness; citizenship; environmental education; health education; careers education and guidance
7. **The pastoral system and personal and social education**
tutor group skills & responsibilities; your legal responsibilities; support services outside the school
8. **Links to other schools and colleges, and with the world of work**
liaison and transition; 16+ entitlement; the world of work; European and international links
9. **The school and its community**
the roles of parents and governors; activities involving the community; community education; the image of the school
10. **The education debate**
the legal framework; evolution and structure of the education system; the origins of comprehensive schools; recent changes including the Education Reform Act; current issues including LMS, GMS; future controversies

Fig. 2



University of Leicester
School of Education

PGCE Secondary

Record of Professional Studies Cover Sheet

Name: _____

Link Tutor: _____

Partnership
School/College: _____

This record is for discussion with your Link Tutor at Progress Tutorials at intervals during the year.

It should act as a record of your individual reading, investigations, and reflection in each of the ten topic areas covered by the Professional Topics File. A course requirement is that you should conduct such activities in all ten topics, but there is sufficient scope in the requirements for you to give particular weight to the areas which are of special interest to you.

On each of the ten Summary Sheets, you should show the extent of your work as you carry it out, and make appropriate cross-references to the relevant page or activity numbers in the Professional Topics File.

Your work (perhaps in the form of reading notes, documents obtained, materials prepared, etc.) should be interleaved in the appropriate positions in the Professional Topics File. (If you accumulate bulky items which are difficult to file - audio or video tapes, for example - devise a method for storing these and index them by topic area.)

For each Progress Tutorial you will need to have the following documents available and up-to-date:

- | | |
|---------------------------------------|---|
| Record of Professional Studies | - containing 10 Summary Sheets |
| Individual Action Plan | - containing Planning Sheets for the current and previous tutorials |
| Professional Topics File | - containing work done, filed by topic |

On the inside pages you will find more detailed guidance on the use and completion of Summary Sheets

Fig. 3

University of Leicester • School of Education

PGCE Secondary Course • Professional Studies Summary Sheet

Topic No.

Title _____

Student _____ Link tutor _____

Professional Topics
Activity Ref.

Sheet no. on this topic

For guidance on completion of this sheet, please consult your 'Record of Professional Studies Cover Sheet'

Fig. 4

Secondary PGCE Year Outline 1992-1993

☐ First teaching practice - Partnership school*
☒ In Partnership school ☒ Second teaching practice - different school

Week beginning	Monday	Tuesday	Wednesday	Thursday	Friday
September 14	1				
September 21	2	Primary School Attachment			
September 28	3				
October 5	4				
October 12	5				
October 19	6	Schools' half term			
October 26	7				
November 2	8				
November 9	9				
November 16	10				
November 23	11				
November 30	12				
December 7	13				
December 14	14				
<i>Christmas Vacation</i>					
January 11	15				
January 18	16				
January 25	17				
February 1	18				
February 8	19				
February 15	20	Schools' half term			
February 22	21				
March 1	22				
March 8	23				
March 15	24				
March 22	25				
<i>Easter Vacation</i>					
April 19	26				
April 26	27				
May 3	28				
May 10	29				
May 17	30				
May 24	31				
May 31	32				
June 7	33				
June 14	34				
June 21	35				
June 28	36				

Fig. 5

Initially, with school-based ITT and the involvement of over forty schools in the Partnership scheme, it was inevitable that the experiences of the students would differ in quality and substance. As experience of the Partnership scheme has grown, it became more possible to expect schools to deliver certain experiences to the students who were to be based there for their two days per week over the whole year, as well as for one of their extended teaching practices. Schools unable to guarantee certain sorts of experience become more likely to be unacceptable as Partnership schools.

The structures and processes supporting Individual Action Planning

In its first year, the Individual Action Planning process was conducted in the Professional Studies component of the year. This was the one area experienced by all students, so it was possible to agree common practices among the team of sixteen tutors involved.

Soon after arrival for their Initial Teacher Training, students meet their Link Tutor for their first Progress Tutorial. This is, in effect, an entry tutorial. Prior to it, students are introduced to the concept of continuous professional development, and the role that Individual Action Planning can play in this. At times of anticipated transition especially, it is important to give thought to the next long term goal and to be as clear as possible about it. For teachers in initial training, the goal is fairly clear but it can be refined and redefined as time passes. During the PGCE year the IAP process is concerned with short term targets, those for the next few weeks — while bearing in mind and continually checking the longer term goal.

The students are asked to write down those skills and competences that they think they are quite good at and have some relevance to teaching. To help them in this they have the list of skills, competences etc., that the Professional Studies work is expected to develop. This list acts as an audit or checklist to aid their thinking. Inevitably using such a list enables them to see the sorts of issues that they need to develop further and on which they need to focus over the year. Many students find it hard to translate their experiences into skills and need help with this. Others are reluctant to acknowledge that they are bringing any relevant skills to their training even though this is patently not the case. In discussion with their Link Tutor, they are able to negotiate and prioritise their targets and list those that they should focus on for the first part

of their training. In order for this to be effective, the Link Tutor has to have a clear idea of the sequencing of the experiences that the student is likely to meet over the course of the year, and so can say that certain of the student's suggested targets are best left until later and others given a higher priority for the next phase.

To begin with, some students find it difficult to focus sharply enough on specific targets. They are too woolly or broad in their goals for the next phase of the course. With help from their tutor they learn to have short term goals to achieve by certain dates and also they learn that they have to think about how their targets can be met. They start to ask who can best help, and to involve the Professional Tutor in their partnership school, as they seek to meet their targets.

Over the year students have four Progress Tutorials with their Link Tutors (Fig. 6). These are at key times of change in the training programme, e.g. at the start of the year; soon after the first extended teaching practice and before their longest period in the Partnership school; just before their second extended teaching practice and as they are about to finish their initial training year and make the transition into their first post as newly qualified teachers.

The timings of the Progress Tutorials are agreed by tutors at a PGCE committee meeting before the year begins. The foci for each Progress Tutorial are fairly clear. They are almost determined by the structure of the year, e.g. the placing of the extended teaching practices and the timing of the assessment assignments. However, there is a regular and systematic review of the student's progress, initiated by themselves with the evidence for their views being available at the Progress Tutorials. The main source of evidence is the student's Record of Professional Studies and the associated file of work. The tutor is able to support the student in their view of themselves or provide evidence that might indicate a contrary view. The production of evidence to sustain a view is important and on occasions, both tutors and students have to recognise alternative perspectives to those they first espoused. For tutor and student the skills associated with assertiveness are important. For this reason assertiveness training features as an option early in their ITT. Tutors took part in training for the IAP process before the start of the year. Awareness raising, consideration of how the process might operate, and possible levels of involvement of tutors were discussed at meetings, while a work-

The tutorial schedule

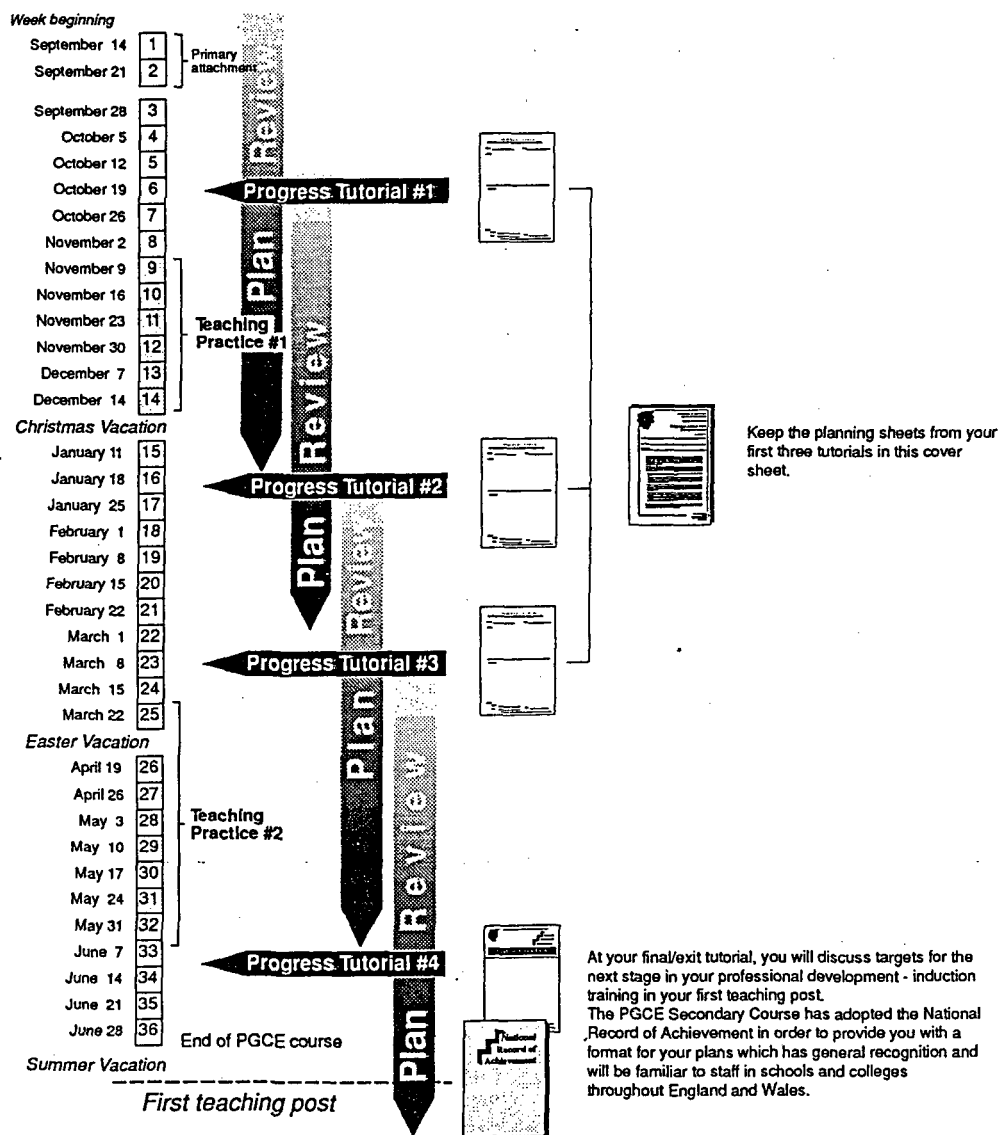


Fig. 6: The timing of the four Progress Tutorials

shop enabled tutors to practise the skills involved in 1:1 interviews. The majority of the time at each Progress Tutorial is spent in negotiating targets for the next phase of the training. Students are encouraged to focus on three to five targets, to make these as concrete as possible, to consider how they might set about meeting them, who might be the best people to help them and to have agreed dates

by which they should be met. For some targets the date might be the next Progress Tutorial, for others, e.g. completion of an assessed assignment, the date will be defined, but for still others there will be negotiation and agreement — a sort of learning contract.

Individual Action Planning gives each student a degree of responsibility for and control over their

own learning. The ten topics in the Professional Studies file do not have to be all studied to the same depth. Students may have particular interests and desires to study some in greater depth. Some students may be able at the start of the PGCE year to fulfil most of the exit criteria for the topic on Information Technology, for example, and may spend little time on that topic. Others may know a great deal about providing equal opportunities in the classroom and wish to improve their profile by concentrating on topics with which they are less familiar.

Templates of the Individual Action Planning sheets have been placed on the Apple Macintosh computers and the Nimbus network used by the students, as have templates for the inserts for the NRA. This means that students may develop further some of their IT skills as they use these templates. In addition, they are able to cut and paste from the templates to produce their own *curricula vitae* in a final form that differs from that of the NRA, but without the need for extra typing.

Being involved with Individual Action Planning gives the students experience of a process that will be central to them in their professional life. As teachers, they will take part in the appraisal process. Action Planning is central to this as are:— the process of review; collecting evidence of achievements; using the views of others to evaluate their achievements and the cyclic process of Plan — Do — Review. Likewise as members of a department, they will be involved in departmental reviews and as members of school staffs in whole school development planning. The processes in each of these cases are the same. The more one plans the better one gets at it so that the individual's planning skills are enhanced.

In Leicestershire and Northamptonshire, and possibly elsewhere too, enhanced Induction Programmes, based on the individual needs of newly qualified teachers are being organised. These are based on Individual Action Planning. If at the end of their Initial Teacher Training, students leave with an Individual Action Plan outlining their needs as they see them, for their further professional development at the transition into their first post, a most positive bridge is built between initial training and the job, with the expected entitlement to continuous professional development thereafter. Those who have experienced Individual Action Planning in their Initial Teacher Training will also bring the associated skills with them as they enter the profession. They are more likely to use the

meetings with the Professional Tutor in the school to full advantage, to accept and expect that their continued professional development is always on the agenda.

In addition, as teachers, they will be involved with recording the achievements of their pupils, with the reporting of these to the pupil and to the parents or those with responsibility for the pupil. Having themselves been involved in parallel processes is likely to be of help to them. They will be able to help their pupils set more realistic targets, to enable them to see the importance of providing quality evidence of their achievements, to recognise the value and necessity of praising and encouraging, of giving feedback and of promoting the self-esteem and motivation that comes with sharing the responsibility and control of the learning with the learner.

Future Developments: IAPs in Induction and in the continuous professional development (CPD) of teachers

There are several indicators that suggest that it is primarily the individual who should be taking a lead in their own continuing professional development.

Among these are the:—

- introduction of appraisal
- increase in the number of short or fixed term contracts
- increasing local mobility of the profession
- likelihood of periods of rest between jobs
- recognition by individuals that they need continuous professional development (CPD)
- upgrading of the importance of the induction period.

Appraisal offers a valuable opportunity to engage in a collaborative job evaluation, the outcome of which is a negotiated Individual Action Plan stating priorities for professional development over the next eighteen months or so. Individuals will expect to see some attempts to meet the expressed needs which have been agreed with an appraiser. Individuals' needs will feed into departmental needs and into those of the institution. Thus a coherent mechanism exists for carrying forward the agreed priorities at each stage, so that there can be a needs-focussed provision of continuous professional development.

For people on fixed term contracts the need for regular evaluation of their progress and for indications for further professional development are even more pressing. They will be keen to ensure that

CPD opportunities provided actually meet their needs, for they have no time to waste on matters that are marginal to their needs. People on short term contracts necessarily have an eye on the market and they will be keen to develop additional expertise that, while not necessarily being of immediate value, may well stand them in good stead in the future.

It is very probable that from time to time, many individuals will be unsuccessful in obtaining one short term contract that runs into another at the same institution. Equally, it is almost certain that devolving staffing budgets to schools will result in a greater number of fixed term contracts. Combining these two situations will mean that teachers are more likely to change jobs more often and that some will experience periods of rest between posts. These rest periods are likely to become times when they pursue aspects of further professional development, and to use them most effectively, individuals will need to have engaged in thinking more sharply than might have been the case in the past, about their priorities for CPD. They will at the same time, have to have at the ready, a completed curriculum vitae and an outline draft letter of application, so that they may apply immediately for any suitable post that is advertised and is within commutable distance.

The National Record of Achievement (NRA) would serve well as a portable summary of record giving, via an Individual Action Plan, their priorities for further professional development and through the Personal Statement, an indication of how they see their career path unfolding.

Newly qualified teachers (NQTs) are starting to enter the profession at the present time with Individual Action Plans outlining their priorities for further professional development as they see them. These documents make valuable starting points for discussion with the Professional Tutor in the school and with the Head of the Department to which the

NQT is appointed. Through regular meetings with their mentor in the school, the NQTs are, from the very start of their career, encouraged to take some responsibility for and control over their professional development and to recognise that they have an entitlement to support from the institution that they have joined.

It is the quality of the individual teachers that give an organisation its edge. Through being encouraged and valued everyone can make more of a contribution. A climate of openness and trust can flourish only where there is a recognisable investment in the people who are central to the success of that organisation. Regular meetings, with a trusted, more senior colleague whose perspective is wider than one's own, and, which review and evaluate progress and result in a negotiated Action Plan for the next phase, represent a notable first step towards this end.

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