

Professional Learning for School Principals: Developments in Scotland

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Abstract

This paper discusses the recent origins and development of professional learning and especially preparation programmes for Scottish school principals. Scotland has adopted a 'standards' based approach to continuing professional development and a Framework of Standards has emerged since 1998. A synthesis of the official reports and some of the research available, is offered with a view to highlighting the further developments now being advocated and consulted upon under the aegis of a teacher-focused national Continuous Professional Development Advisory Group and its sub-group on leadership.

Introduction

Scotland is a small country with a declining population of around five million with strong popular support for state schools and teachers. Historically, Scotland has always had its own separate and distinctive educational system, (Bryce and Humes, 1999) but the recent restoration of the Scottish Parliament with devolved responsibility for education, suggests that there are increased opportunities for distinctiveness across the educational systems of the United Kingdom.

The Scottish Executive [government] and Scottish Parliament have developed a series of educational initiatives including a national debate about education and its purposes (Scottish Executive Education Department [SEED], 2003), agreement on the national educational priorities for schooling (<http://www.nationalpriorities.org.uk>), the introduction of new community schools (Sammons *et al.*, 2003), and enhanced teacher conditions of service (SEED, 2001a) including an emphasis on professional renewal, school re-culturing and the

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professional learning or continuing professional development (CPD) of teachers.

In his report on teacher education and training, Sutherland (1997) had concluded that greater coherence was required in the arrangements for CPD. A national framework (Purdon, 2003; Christie and O'Brien, 2005) to include probation and induction, and the range, types and levels of CPD undertaken by teachers was envisaged, and since 1997 such a framework, including provision for school management and leadership, has emerged (see Table 1). This framework is standards-based, building on initial teacher education standards (SOEID, 1993) despite Scottish and world-wide reservations (Stronach *et al.*, 1994; Delandshere and Arens, 2001; Mahoney and Hextall, 2002). The Scottish approach to standards and competences has general acceptance and reflects a professional consensus influenced by a government approach that stresses the 'commonsense' nature of standards and competences which suggests little additional workload for Scottish teachers because they are essentially a 'consolidation of existing good practice' (Drever and Cope, 1999: 103). Comparison with English standards suggests that Scottish standards are less 'technicist' and based on a broader view of education and the professional role of teachers and school leaders.

Table 1

The Scottish Professional Development Framework for Teachers

| Career Stage | Programme/Qualification | Associated Standard |
|---------------------|---|--|
| Pre-Service | Initial Teacher Education | The Standard for ITE in Scotland Benchmark Information |
| First Year | Teacher Induction Scheme | The Standard for Full Registration |
| Established Teacher | Chartered Teacher Programme leading to Chartered Teacher Status | Standard for Chartered Teacher |
| Senior Management | Scottish Qualification for Headship | The Standard for Headship |

Teacher Professional Development in Scotland: Post McCrone Agreement

The most important influence on teacher Continuing Professional Development (CPD) or professional learning since 2000 has been the McCrone Committee of Inquiry. The McCrone Report (SEED, 2000) and subsequent Agreement (SEED, 2001) emerged from a period of teacher industrial action associated with perceived low pay, status and morale. McCrone called for a review of initial teacher education (now completed) and made recommendations about 'stable employment' of newly qualified teachers, with guaranteed improved support and a new induction scheme was introduced in 2003 (Draper, *et al.*, 2004; O'Brien and Christie, 2005). The importance of CPD for all teachers was highlighted and motivation and individual work satisfaction were endorsed as important goals for CPD not just school and system needs.

McCrone endorsed initiatives already begun as part of the CPD Framework discussions (SOEID, 1998a) and development of Standards reported above. While the professional and remuneration effects for teachers of the McCrone settlement are significant, there were other important implications – management within Scottish schools was to be 'flattened' because the agreement included changes in the structure and management of schools, with moves to a reduced hierarchy, more participative management, an emphasis on collegiality (MacDonald, 2004) and enhancement of the professional autonomy of attested experienced teachers. There were important implications for teacher career structures and for the future 'pool' of aspirant principals or headteachers as they are known in Scotland, especially by the suggestion that there should be a national programme for *Chartered Teacher* status with commensurate financial rewards (O'Brien and Hunt, 2005), which,

... should be open to all experienced classroom teachers... It would constitute a personal achievement, rather than a post... it would require completion of a challenging and structured programme of relevant and accredited CPD, over a period of four years, aimed at improving teaching and other professional skills (SEED, 2000, para 4.12)

The McCrone Agreement stressed the importance of CPD beyond the Standards and 35 hours of CPD is now a contractual annual responsibility of teachers. CPD is provided in-school and elsewhere by employers and others such as private consultants and higher education institutions (HEIs). The General Teaching Council (Scotland) [GTCS]

is charged by SEED to take a particular interest in the maintenance and development of the CPD Framework. The role of the GTCS was expanded to allow it to consider the career development of teachers, as a result of the Standards in Scotland's Schools Act of 2000. Non award bearing course providers are invited to register as approved providers with GTCS and there is a national database of courses offered by such approved providers; beyond registration there is little evidence of external quality assurance at this juncture. The situation differs with respect to those standards that involve higher education and stakeholder partners viz. ITE, Standard for Headship and the Standard for Chartered Teacher. GTCS is involved in accrediting the programmes associated with these Standards.

Following the publication of *A Teaching Profession for the 21st Century*, SEED issued continuing professional development guidance in order to support teachers, and those managing CPD for teachers. This advice arrived in the form of five documents issued to all teachers in Scotland towards the end of 2002:

1. Continuing Professional Development (SEED, 2002a)
2. Standard for Chartered Teacher (SEED, 2002b)
3. Chartered Teacher Status: Frequently Asked Questions (SEED, 2002c)
4. Professional Review and Development (SEED, 2002d)
5. Professional Review and Development: Frequently Asked Questions (SEED, 2002e)

Leadership and management were not forgotten and the other two documents in the series are:

- a. The Standard for Headship, first issued in 1998, revised in 2002 and presently under review (SEED, 2002f; 2005c).
- b. Continuing Professional Development for Educational Leaders (SEED, 2003a).

Professional Learning for Management and Leadership in Scotland: 1990-2005

Internationally, the importance of school leadership continues to be emphasised by governments and is consistently identified by research as a key constituent of effective schools particularly in the UK (Gunter

2001; MacBeath and Mortimore, 2001). In the late 1980s and early 1990s a series of management training initiatives were taken forward within Scottish education authorities (EAs) [districts] and nationally, but there was no consistently progressive longstanding programme (O'Brien and Draper, 2001). There were conflicting views about this period and one commentator described the Scottish Education Department's ten modules associated with the 'Management Training for Head Teachers' programme as 'repetitive and embarrassing' (Morris, 1995: 52). This experience, together with earlier experience (Draper *et al.*, 1995) and practice in other systems, identified the need for a more coherent, grounded pathway for leadership and management development in preparation for the Head teacher role.

The 'Scottish consensus' development model was followed, with a managed consultation process (SOEID, 1997) supporting the publication of *The Standard for Headship* (SOEID 1998a). This Standard based on substantial development work and research (Reeves *et al.*, 1998) on the nature of professional practice provided a framework for the review and assessment of Headship capacity and consequently for developing potential Headteachers. The Standard avoided narrow competence-based approaches to practice, although drawing from them, by developing a model which required the successful development of Professional Values, Management Competence and Intellectual and Interpersonal Abilities and was widely acclaimed within the profession (Kirk, 2000: 57-60).

Why have Preparation Provision for Headship?

In most developed countries the emphasis over the last few decades has been on the economic and social imperative of more effective schools and the development of a skilled workforce for the emerging knowledge economies of the 21st century. Effective schools' research has consistently cited the key role of the principal or headteacher, and this has been supported by other forms of advice. In giving evidence to the House of Commons in 1998, the influential international management consultants, Hay McBer Ltd. who have been instrumental in much headteacher development in England, concluded that,

highly effective head teachers were the 'highest performing leaders' when compared to other groups of senior managers in public and private sector organizations ... The role of the head is 'one of the most demanding' that they had ever encountered because of the 'sheer

range' of management and leadership accountabilities. (House of Commons Select Committee on Education and Employment (1999): Section B, paragraph 15).

Southworth (2005:75) recognises this with an emphasis on student learning and achievement,

...what distinguishes school leaders from leaders in other organizations is their desire and responsibility to enhance students' learning. It is precisely this focus on students' development which makes school leadership distinctive and different from many other forms of leadership. Indeed, it is this commitment to improving students' achievements which drives so many individuals to become school leaders. They explicitly seek and want to make a difference to the schools they lead.

The revised Standard for Headship (SEED, 2002f) defined The Key Purpose of Headship as being:

To provide the leadership and management which enables a school to give every pupil high quality education and which promotes the highest possible standards of achievement.

The Standard sets out the key aspects of professionalism and expertise that the Scottish education system requires of those who are entrusted with the leadership and management of its schools. It defines the level and range of competences required of effective headteachers in the early years of their headship. It serves, therefore, as the template against which those aspiring to be headteachers may be assessed in order to determine their strengths and development needs. On the basis of this assessment, aspirant headteachers can plan individual development programmes that will enable them to achieve the Standard. Thus attempting to embody Goleman's view (2002: 109) that:

The crux of leadership development that works is *self-directed learning*: intentionally developing or strengthening an aspect of who you are or who you want to be, or both. This requires first getting a strong image of your *ideal self*, as well as an accurate picture of your *real self* – who you are now.

What is the SQH?

The Standard for Headship informed the development of an associated programme for the Scottish Qualification for Headship (SQH). The SQH (SEED, 2005a; 2005b) was designed to ensure competence in all aspects of the associated Standard. Those who gain the qualification will have

demonstrated, both through critical reflection and through leading and managing projects in workplace settings, the full range of competences of the effective Headteacher:

SQH has been a unique experiment in the teaching profession in Scotland. For the first time, a national standard was defined for a particular role within the profession and a qualification piloted and developed to enable those who wished to develop their practice to meet the Standard to do so (O'Brien, Murphy and Draper, 2003: 65).

A major two-year national development programme based on the Standard commenced in 1998 when SEED provided funding for the piloting and subsequent full-scale implementation of two programmes – an Accelerated Route (AR) for those who were already competent school managers and who could evidence this, and a Standard Route (SR) for those seeking further development (<http://www.scotland.gov.uk/library5/education/sqhis-00.asp>). They were both designed to lead candidates to a level of professional practice equivalent to that described in the Standard and recognised by the award of SQH (HEIs also award a Postgraduate Diploma in Leadership and Management). An important element of this initiative was the emphasis placed on partnership between employers and university providers in the three initial consortia approved by SEED to deliver validated and accredited SQH programmes (O'Brien and Draper, 2001).

With the exception of a limited number of government-funded studies, (Morris, 1999; Malcolm and Wilson, 2000; Simpson *et al.*, 2000; Murphy *et al.*, 2002) and an independent national evaluation (Menter *et al.*, 2003), the majority of research reporting on the SQH programme has emerged from the 'consortia' approved by SEED to deliver the SQH programme (Cowie, 2005; Kerr and Murphy, 2002; Morris and Reeves, 2000; O'Brien and Draper, 2001, 2002; O'Brien and Murphy, 2003; Reeves *et al.*, 2001). These evaluations and research have focused *inter alia* on the resourcing of the programme; participants' views; the social dynamics of work-based learning; assessment of particular elements or competences of the Standard for Headship; and the role of EA coordinators. What does this research tell us about the SQH programme, formal preparation for Headship and professional learning?

The Nature of the SQH

The SQH is based on a set of design principles underpinned by research into professional learning (for example Eraut, 1994). This model

stresses that learning has to influence practice and make a real difference in schools. Learning **what** is involved in Headship, thinking about **why** Headteachers take decisions and trying out **how** to do the core activities of Headship are brought together in the programme in an integrated approach to professional learning. The learning and assessment activities are designed to make connections between the personal and professional context of the individual, the policy context in Scotland and the conceptual and research framework written up in the international literature on school leadership and management and professional development.

The SQH programme offers a powerful model of professional learning for serving staff in Scottish schools. It aims to build on the strengths of training previously offered separately by employers and by HEIs by combining theoretical and practical approaches through 'workplace learning' (Reeves *et al.*, 2002). There are two perspectives worth rehearsing more fully:

It is not enough in the SQH programme to be able to assemble ideas and arguments effectively in an essay. Critical reflection must have shown results in the workplace and in personal development if it is to be credited;

On the other hand, work activity that is not carefully considered in the light of research, that is solely about implementation and does not require critical reflection, will not meet the requirements of SQH.

Those undertaking the programme are challenged personally and professionally. It makes demands on the time of busy people with a heavy set of responsibilities as the programme is undertaken while candidates are actively engaged in their day-to-day activities. It can only be worthwhile if candidates make the time to grow, develop and learn through the programme and approach its challenges in a way which seeks that growth.

EA partners have SQH co-ordinators who are key figures in helping candidates clarify their involvement in the programme and its related tasks: the sense making process highlighted by Louis (1980) on an individual basis, by Weick (1995) in relation to organisations and by Reeves *et al.* (2001) in relation to the SQH. Additionally, these co-ordinators have developed local support networks, schemes for selection and recruitment, pastoral and logistical (for example ICT) support for candidates, programmes to bring teachers up to the SQH entry level (referred to as 'pre-SQH') and in a wide range of other ways ensured the success of the programme (Murphy *et al.*, 2002a). The national

evaluation (Menter *et al.*, 2003) cited a number of issues for consideration but largely endorsed the programme's positive outcomes and experiences, however, Cowie (2005: 396) offers a note of caution with respect to the work-based and partnership model:

Even exceptionally able participants may find it difficult to thrive in stagnant schools with poorly developed systems and an impoverished culture, while the converse may be true in a more supportive school environment.

Operationally, the programme worked within a national template, with specified Units and associated learning outcomes initially tested in the 'pilot' programme (O'Brien and Murphy, 2002). This national template framed local programmes, developed and delivered by three SEED approved *consortia* consisting of HEIs and partner local employing authorities working in a collaborative partnership. The partnership model for planning and delivery ensures dialogue and mutual consideration of the operational priorities of the employer and the concerns of University staff to situate current Scottish practice in a broader literature and academic framework. The programmes (Kerr and Murphy, 2002; Murphy *et al.*, 2002b) may be summarized thus:

All candidates evaluate their current practice against the Standard and identify personal learning needs.

Learning takes place through the usual range of academic coursework (reading, reflection, written assignments, class meetings and workshops) *but* just as importantly through experience. It is a central principle of the programmes that candidates should not just know about leadership and management but should be able to practise successfully in a contemporary school setting.

Work-based learning is supported by candidates compiling a portfolio of evidence, assessed as a written document, but also through a field visit. As part of the portfolio, candidates must demonstrate that their leadership has made a difference to the learning lives of pupils through successful management practice with and through staff.

Workplace learning is supported by the local authority employer and by the school Headteacher, acting as the candidate's supporter throughout the programme, in partnership with HEIs.

Quality is assured by the national programme descriptor, nationally set performance criteria, national training within the pilot phase and University quality assurance procedures.

EAs as employers in partnership with HEIs control access to the programme.

Future Development

A professional development framework for leadership

SEED (2003b) published the national CPD framework for education leaders in schools and education authorities. The national framework for leadership development report helpfully defines the relationship between leader and manager (p.4),

A leader secures the support, commitment and enthusiasm of staff and so enables the smooth and effective running of often-complex systems of management. Leadership is about defining what the future should look like, agreeing a shared vision and inspiring others to make it happen, even in the face of adversity.

... Management, however, might more appropriately be viewed as the practical application of leadership skills. Effective leadership provides positive direction and purpose. Effective management ensures that purpose can be achieved.

It then goes on to identify four broad levels, through which progression takes place:

Project leadership (time limited, small scale projects for teachers early in their career);

Team leadership (regular leadership of working groups or of established teams of staff);

School leadership (including the Scottish Qualification for Headship);

Strategic leadership (for those with overall responsibility for a school, or engaged in leading major initiatives at a local or national level).

O'Brien (2004) suggests that this formulation might lead to a more limited and less encompassing conceptualisation of leadership in Scottish schools while O'Brien *et al* (2003: 72) argue:

Such frameworks can offer a useful template within which to situate desirable career development at different stages, but should not be used to limit and constrain development.

They also take a strong line on the need for preparation and professional learning (pp.53-54):

If school leadership is a serious endeavour it deserves a professional quality of planning, preparation and support, rather than being dependent on luck.

...As schools in Scotland grope towards a flatter structure, with an acceptance of and encouragement of leadership at all levels, it is

arguable that all those involved will need to be introduced to, and accept, their leadership responsibilities.

Work on establishing appropriate provision for the levels in the framework continues with a range of providers producing courses and experiences mapped against elements of the framework.

A Revised SQH

This approach to providing appropriate experiences and courses for teachers to experience the various elements of the leadership framework, has led in turn to national consideration of diverse ways of meeting the Standard for Headship in addition to any revisions and updating of the SQH. Candidates report that they have benefited from the broad definition of leadership that the SQH reflects, with its (global) emphasis on interpersonal and personal skills to support teamwork, collaboration and participation. This emphasis is highly congruent with the thrust of the McCrone settlement which highlights participative decision making and increased status for unpromoted teachers.

Any programme of learning has to evolve as contexts change or mature or new knowledge and theory is formed. The national evaluation of the programme (Menter *et al.*, 2003) together with the experience of six years of provision informed a review of the SQH programme provided by the University of Edinburgh and its consortia partners and led to the formulation of a revised programme, in place for the start of session 2005/6. (This revision emerged despite the delay in SEED activating the review of the Standard for Headship that is now currently underway). Despite the acknowledged and now well documented importance of the leadership role:

Historically, there has been an emphasis on management in Scottish schools but our system is not alone in this regard (O'Brien *et al.*, 2003: 29).

Thus, this revised SQH programme makes a significant contribution to redressing the balance, raising the profile of leadership and providing the context for leadership development of aspirant headteachers. Leadership has a much more prominent position in the revised SQH programme:

Element 4 'leadership and management actions' involves leading and managing learning & teaching; people; policy & planning; resources;

Leadership is a key aspect of course 1 (instead of unit 4) and is revisited throughout the programme, particularly in course 3 (the comparative study) and course 5 (leading school improvement);

(The University of Edinburgh South East Scotland Consortium's; Revised Standard for Headship to Inform the New SQH Programme, 2005).

It recognises that,

Leadership is often distinguished from management. Leadership is about direction-setting and inspiring others to make the journey to a new and improved state for the school. Management is concerned with efficiency operating in the current set of circumstances and planning in the shorter term for the school (Davies, 2005:2).

The professional learning associated with leadership within the revised SQH in the University of Edinburgh *consortium* focuses on the agenda of action towards improving schools and the key element of interpersonal and emotional leadership described by Beatty (2005:2):

School leadership is inherently and inescapably emotional. Yet until recently emotions have more often been positioned as merely pesky interlopers... upon the core leadership business of 'rational' decision-making... Emotions however, are not optional. They are present in everything we do. They tell us to trust, or not to trust, that we are safe to inquire, challenge and change. It is not enough to be intelligent about emotions. Being emotionally intelligent and savvy to emotion's power in leadership is a start. But leaders need to be able to make meaning with emotions, alone and with others. A deepened, embodied respect for emotion's powerful presence in all our lives can inform good leadership and create community.

A Revised Standard for Headship

The consultation on a revised Standard for Headship sets out the government's position (SEED, 2005c: 1):

There is a national consensus in Scotland that effective school leadership lies at the heart of school improvement and the achievement of excellence. HMIE [inspectors] reports that most of our schools are very well led, but there is a clear need to avoid complacency and to drive forward if we are to ensure our school leaders are equipped to meet the many new challenges that lie ahead, and to deliver a world class education to every Scottish child.

The existing Standard for Headship (SEED, 1998; 2002) has been highly regarded and the consensus is much of it is worth retaining. Any

review therefore has to achieve a balance between necessary revision and updating while not losing the essence.

The Leadership Sub-group of the Continuous Professional Development Advisory Group was given the tasks of:

- redefining the Standard for Headship;
- considering and developing alternative routes to achieving the Standard;
- reviewing the headteacher appointment processes and to make recommendations; and
- supporting development of a possible Leadership Academy.

Overtaking the first of these tasks is the issuing in August 2005 for consultation of a draft revision of the Standard for Headship. Assurances were given that this would not affect current candidates embarked on SQH programmes and that any subsequent necessary transition arrangements or potential changes to course content would be discussed and agreed with the consortia offering SQH. The letter accompanying the revised Standard is clear about its intentions:

In producing this draft the Group considered the balance between setting out key elements of professionalism and providing examples of good practice. The draft Standard has therefore been written to highlight broad areas of professional actions but contains an appendix exemplifying good practice. The Group would welcome the views of colleagues on this balance. Highlighted below are some further areas that they would particularly like colleagues to consider. These are:-

- is the focus on 'Professional actions of the headteacher' helpful?
- is the Standard comprehensive or does it need more detail? If so where?
- is this an effective statement of current requirements?, if not what is missing?
- are the contributory elements named appropriately? If not what should they be called?
- the professional action 'Building community' includes a reference to the spiritual wellbeing of children and their families – is it appropriate to include this?

Comments beyond responses to these specific questions are welcomed by the Sub-group.

It will be interesting in due course to review the range of responses to this consultation and to reflect on subsequent changes. How acceptable will this new revision be to the teaching profession in Scotland and other stakeholders? The Standard itself in whatever incarnation to come is likely to be used to engage all headteachers in review and development sessions. Professional learning for leadership and senior management does not begin and end with a Standard nor specifically designed provision such as the SQH. At present, there are other opportunities for professional learning for serving heads and senior managers and teachers at various points in their careers but provision is patchy and capacity is a national problem; a leadership academy may or may not provide a remedy for this. The declaration that there will be a range of diverse and flexible ways to overtake any agreed new Standard for Headship and that the SQH monopoly will cease will inevitably generate views on the nature of formal and informal programmes of learning and for some including the HEIs the importance of reflection informed by the latest thinking and research; the accreditation of learning experiences; forms of assessment against the Standard; the role of mentors and coaches; the list could be extensive. It is possible that there will be swift acceptance of a form of the revised Standard by the end of 2005. Genuine questions remain about associated structures to facilitate the professional learning for Scottish school leaders both those in post and aspirants to headship and it is likely that this discussion may prove more problematic. O'Brien *et al.* (2003: 76-77) suggested a way forward for such professional learning:

...the development of strategic partnership between employers, professional bodies and universities is essential. Each of these partners brings to the table a unique and worthwhile contribution. Employers have an obligation to hold their teachers accountable for the quality of their work... Professional associations bring a practice-based understanding of the current issues and concerns... Universities bring a critical edge to the table... They bring discipline to the processes of evaluation, with their legitimate and rigorous concern for reliability and validity and their traditions of peer scrutiny of findings and methods.

Such an approach might ensure *inter alia*, rigour, fairness, the widespread national availability of provision, the addressing of current issues and concerns (both local and national) while being informed by theory and national and international experience.

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