

Inspiring leaders;
improving children's lives

Review of the Landscape: Leadership and Leadership Development 2008

A review of what is known about effective
leadership and leadership development

SCHOOL LEADERS

Report

Authors: Peter Lewis and Roger Murphy, Centre for Developing and Evaluating Lifelong Learning, School of Education, University of Nottingham.

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Foreword

This document brings together much of what we know about effective leadership and leadership development today. It was commissioned as two separate reviews – one from Peter Lewis and Professor Roger Murphy on effective leadership and the other from Professor Ron Glatter on leadership development – as part of a much larger evidence-gathering exercise to inform the National College for School Leadership’s (NCSL) current review of its leadership development programmes. We found both pieces so helpful in making sense of all that is known in these important fields that we asked Peter Lewis and Roger Murphy to pull the two together into one document for publication, which is what you have here.

It seems obvious that school leaders will benefit from a synthesis of what is known about effective school leadership. Particularly one such as this, which summarises evidence from several decades of research but also relates this to the more current policy challenges that school leaders face, such as making a reality of *Every Child Matters* (ECM), 14–19 and Sustainable Schools. The evidence that emerges is sometimes daunting in its scope, but also offers practical ways forward for leaders through a focus on personal integrity and moral purpose, learning-centred leadership and distributed leadership.

But why should school leaders need to know about leadership development – surely that is NCSL’s job? We would argue that if that ever was the case, it is no longer so. Succession planning and growing future leaders is increasingly a core part of every school leader’s role, not simply to address a demographic shortage of headteachers, but because it is the best way of securing a professional culture focused on innovation and excellence (as leaders across every sector are discovering). Equally, as this review of the evidence makes clear, the best talent and leadership development is grounded in the workplace, with all staff having opportunities to grow and learn in the context of their daily work, enriched by a range of wider opportunities to experience other contexts and other provision.

This evidence around what makes for the most powerful leadership development is the reason we have developed our ‘local solutions’ approach to succession planning, which empowers schools and local authorities to develop their own strategies that suit their contexts, capacity and needs. It is also what is driving our thinking as we develop our review of leadership development programmes. I hope you find this synthesis as influential for your practice as we have for ours.

Toby Greany, Operational Director – Research and Policy, NCSL August 2008.

Introduction

This report summarises two more detailed documents produced for the National College for School Leadership (NCSL) early in 2008:

Effective School Leadership: A brief review summarising selected literature on the evidence for effective school leadership

Peter Lewis and Roger Murphy April 2008

Of Leadership, Management and Wisdom: A brief synthesis of selected reports and documents on leadership development

Ron Glatter, February 2008

Those two reports are based on a wide research base, for we know a great deal about leadership and its development. Here, we first describe what is currently known about effective school leadership, starting with core leadership practices for which evidence has built up over many years. Some background themes about the nature of that leadership are explored: the importance of being responsive to context, the need for learning-centred leadership and the growing importance of distributed leadership, with flatter structures and a greater emphasis on teamwork. Some key developments in the context are then shown as stretching and extending those core leadership practices in recent years and posing new challenges as we look ahead.

School leaders need good development opportunities at every stage to tackle the complexities of leadership and the new policy agendas. Their continuous professional development (CPD) must be appropriate to their roles and needs, reflect best practice in terms of what works in leadership development and build on those values and styles known to be effective within leadership practice itself. The report therefore describes some of the future characteristics of good leadership development, mindful that these principles will need to be reflected in what is offered at every level, including the local level of individual schools, groups of schools working together and local authorities.

We depict school leadership as a vital arena for evidence-based leadership practice, building on experience, learning lessons in a journey of improvement, able to 'look over the wall' and to adopt the best of practice from elsewhere, while confident in the specifics of leadership in a school context. These are exciting and significant challenges which can be tackled positively by school leaders who are given relevant support and guidance.

1 Effective school leadership: core leadership practices

Many individual studies of the effectiveness of school leaders, conducted between 1980 and 1995 in Europe, the US and Canada, have subsequently been overviewed to provide general conclusions about the contribution of leadership to effective schools. This drawing together of research gave new impetus to national and international attempts to improve practice in schools in the early years of the new century. Educational reforms in Europe and North America have encouraged new ideas about school leadership as a key component of plans for school improvement. A number of summaries set out the effective core leadership practices that promoted the achievement of educational reform goals. These studies highlighted the following practices:

setting direction: about vision, goals and establishing high performance expectations

developing people: providing individualised support and personal consideration, emotional understanding and support, intellectual stimulation and modelling

redesigning the organisation: building a collaborative culture, re-structuring the organisation, working at productive relations with families and communities, connecting school and the wider environment

managing the learning programme: dealing with issues about staffing, providing teaching support, monitoring, buffering staff from distractions to core work

Leadership behaviours: being optimistic, positive and improvement-oriented, having clear priorities and well-developed management structures and systems

A seminal restatement of seven strong claims in respect of school leadership (Leithwood et al 2006b) also covered many of these issues. In particular this highlighted three key issues:

First, leadership's impact on pupils is largely mediated via classroom interactions and pupil engagement is critical, so leaders need to think how they can impact on that – indirectly in most cases.

Secondly, leadership behaviours are described as a repertoire to be deployed according to context. While that context has been explored in terms of factors such as school size and type, stages of the school improvement journey and changing public policy agendas, there is still work to be done on developing diagnostic techniques that allow the selection of the right leadership behaviours for any particular school context.

Thirdly, values and beliefs, and the motivational behaviours that build capacity and influence both pupils and teachers, have emerged as central to effective school leadership work, and these methods and techniques need further exploration.

A parallel NCSL summary (2007c) added some important points about the kinds of self-management that leaders need in order to sustain the longer haul of maintaining improvement over time. As the policy agenda moved on, new tasks and new models of school highlighted the increasingly diverse nature of schools with many different models for being an effective leader (PwC 2007). Meanwhile, concerns about securing a new generation of school leaders highlighted issues about developing future leaders and succession planning – additions to the list of core practices.

These lists of core practices still play a key central role in any wider analysis – they can, however, now be built on and extended in order to address the challenge of some

emerging new contexts. Indeed, everything that we know from the wider world of leadership in the public sector, in commercial companies and in the voluntary sector would underline the nature of leadership as a complex, interactive social practice (Hartley & Hinksman 2003). This view recognises the uncertainties and frequent changes faced in modern leadership. Living with uncertainty, the ability to learn from mistakes, adaptability and the capacity to build trusting relationships are all likely to be even more important in the future.

Leadership is often a matter of not just knowing certain things (formal knowledge which is easy to teach) but also tacit, personal knowledge about individuals and their context (much harder to learn formally) and about matters of judgement and the ability to read situations. In contrast to the caricature of the leader as someone who can make sure quick-fire decisions and who knows their own mind, there has emerged a recognition that leadership often requires a maturity of judgement or wisdom, which is marked by deliberation and the understanding of other people's perspectives. It then becomes critical that a leader can recognise which decisions are really important (not always the obvious ones) and can employ prolonged deliberation, while dealing very quickly with those decisions not meriting this amount of care. There is sometimes a premium to be had from slow thinking (Claxton 1997).

These levels of complexity are often of course recognised by school leaders. An extended exercise with headteachers identifying the knowledge and capabilities needed for effectiveness in the role, concluded that, while various areas of knowledge and types of skill could be identified for competent performance, above-average performers possessed higher order capacities such as 'reading the situation', 'balanced judgement', 'intuition' (not just a hunch but tested against stored memory and ordered experience) and 'political acumen'. Knowledge and

skills are clearly important, but these higher order capacities are crucial in enabling the knowledge and skills to be applied appropriately in the complex situations in which school leaders find themselves daily (Cave & Wilkinson 1992).

2 Effective school leadership: some underlying themes

These critical core practices need to be related to some underlying themes about being responsive to context, about a style that is right for the business schools are in, and about structures and systems which share leadership functions. We will now look at these key topics.

Responsive leadership

There is strong support for the idea that a wide variety of contextual factors need to be both investigated and taken into account in developing school leadership strategies. That school context will be both multilayered and time-dependent. There will be short-term features (such as levels of staff sickness or key staff absences) alongside cyclical factors (such as stages of the school year, pupil development over the year or the curriculum) and each overlaid with the overall culture and character of the school or parts of it (Southworth 2004). Changes in public policy and expectations are a critical part of the context for leaders and the more school leaders have to engage with a wider local community the more they will need to broaden their understanding of what constitutes the context of any particular school. School leaders must be able to decipher specific contextual clues and indicators in their own environment if their leadership is to be responsive and their judgements based on evidence and experience.

Learning-centred leadership

School leaders' knowledge of and commitment to technical excellence in teaching has been shown to be critical if they are to provide themselves, or to recognise and encourage skills in others, for learning and assessment.

Decisions have to be made about what is taught (curriculum), how it is taught (pedagogy), how it is assessed (formative and summative assessment) and how learning is delivered (organisation). Although drawing on others for this process, leaders need to be seen to be confident about these issues and their implications. If learning is at the centre of a school's purpose, then effective school leaders should know what is happening within classes and among individual pupils and ensure the efforts of all staff are focused on pupil learning. This imperative must characterise all systems of communication, data collection and review, staff development and the shaping of school culture.

Three powerful tactics can influence teachers' practice:

Modelling: leaders' behaviours matter more than what they say and they are always on show and influencing their audiences.

Monitoring: observing, sampling, recording, reviewing, in ways that demonstrate a commitment to evidence-based practice and discovering what pupil experience is.

Dialogue: conversations about learning will happen formally and informally, with the leader's interest a spur to improvement of practice. Assisting teachers to articulate what they are doing is a vital step to sharing that knowledge and improving capacity.

Behind this vision lies a range of mechanisms to analyse data, pinpointing practices that need to change and helping teachers make the changes needed. Evidence suggests that, while staff capacity is the most critical element in improving learning, it is the one that is hardest for leaders to influence. Motivation, commitment and sustaining teachers' resilience are all important factors. In adopting a profile that is reflective, supportive and encouraging, school leaders are drawing on what we know from other sectors about the importance of leaders being seen to listen and look around (Lewis & Murphy 2005). It is increasingly recognised that teacher improvement requires a culture of openness and confidence in which risks can be taken

and mistakes learned from – something which leaders need to model and foster, providing space for peer observation, communication which shares best practice and celebrations of achievement.

Tackling significant within-school variations means that leaders have to find ways to identify and diagnose trends and patterns both within and between subjects. In this process headteachers have to model the attitudes and behaviours that are helpful, and encourage the kinds of relationships among staff that will support teacher development. They also need to support middle leaders with data analysis, which informs critical reflection, and with processes to encourage openness in debates about teaching practices.

Strategic conversations with all staff members enable leaders to build capacity, engagement and motivation. School leaders can then indicate to staff what matters, with an emphasis on critical analysis of the strengths and weaknesses of their current performance. They will also want to retain a clear emphasis on the effectiveness of student learning (not just test/examination results) and with a focus on trying new things and building on feedback.

More recently there has been a stronger expectation that leaders would encourage a pupil voice in this learning-centred approach. There needs to be debate about the respective roles of leaders and teachers in these direct contacts with pupils and the dynamics of communication in such a conversation. Nevertheless the significance of pupil participation in a learning-centred dialogue can hardly be over-estimated in the light of the evidence about pupil engagement as a factor in the success of schools.

A final issue here is the recognition that teachers are themselves learners and the ways in which a good school leader can encompass the promotion of teacher learning as well as student learning. Among the skills here are those as a coach, willing to work alongside staff in developing their practice, and those as a staff developer, able to

commission and sometimes lead appropriate multimethod approaches which support practice development. While being ready to challenge poor performance or an acceptance of low standards, effective leaders will also be creating a culture in which all staff feel enabled to ensure that every student reaches his or her potential.

We would see learning-centred leadership as an important, but broad, umbrella framework for a variety of leadership skills and independent of whatever particular approach to learning is currently adopted.

Distributed leadership

Leadership has a greater influence on schools when it is widely distributed and a team of leaders is more influential than the efforts of any individual (Leithwood et al 2006b). Some patterns of distribution are more effective than others, but there is less evidence about which pattern suits different situations. Evidence from other sectors emphasises that leadership should be co-ordinated as well as distributed. Clarity of roles and good structures of communication are critical. The distributed leadership model requires a headteacher to work collaboratively with a team of middle leaders and they need to think about how to work with and manage other leaders. Since these interactions, like so much of a headteacher's practice, are public and easily scrutinised by staff, it is important to lead the leadership team in a way that itself models good leadership to the middle leaders and displays overall school values in action.

These issues assume extra importance now that new leadership models have opened up additional posts within leadership teams sometimes to free the headteacher to focus on learning. New policy agendas (described below) have also drawn the headteacher into other tasks that are only possible if there is well-distributed leadership to get on with the important day-to-day business of raising standards and solving problems. In addition, distributing leadership gives staff a chance to develop and practice leadership skills as an

important step in the journey of developing school leaders for the future. Collaborative leadership practice and leadership coaching *within* the school are opportunities to build skills for working alongside other leaders in development activities *outside* the school as well.

This proliferation of new ways of working with a variety of organisational models adds urgency to the core task of being able to design sound organisational structures. School leaders need to be able to review the way their organisation works and to propose alternative designs that perhaps reflect the ways in which innovative organisations operate elsewhere.

3 The challenge of new policy agendas

Recent policy initiatives in education pose both a challenge and an opportunity for school leadership. While distributed leadership can help, these new agendas also require different leadership styles. In a changing context, one might anticipate the deployment of a different repertoire. Some research studies of specific schools, recognised as successfully breaking new ground, give a glimpse of the range of leadership roles required. In this section we deal with some specific points in relation to each of the various initiatives and then introduce some approaches that appear to be relevant to all of them.

Personalised learning

The Children's Plan's emphasis on personalised learning, as part of a series of developments over the next 12 years, adds extra urgency to the idea of learning-centred leadership (DCSF 2007). Schools are required to focus on pupil learning characteristics in order to tailor support and interventions appropriately. Tackling barriers to learning and allowing each child to achieve their potential in this way means that schools need to encourage both active participation and pupil responsibility for their own learning. This can involve forging new partnerships with parents and carers, by, for example, providing information that enables them to support pupil learning. Leaders need to both build on what has been learned about learning-centred leadership and to extend leadership skills in new ways. Personalised learning involves schools drawing on the best practice of all schools. Individually tailored learning requires methodical assessment and reviews of progress in evidence-based learning plans (Hopkins 2004). It poses organisational challenges in terms of a more flexible curriculum, the management of choices, a student-centred approach and

engagement with stakeholders other than the learner (at least initially: parents and carers). The range of relationships which both the school leader and the school leadership team might be involved in is thus opened up, with new styles of communication needed. As part of this school leaders need to model to teachers the new dynamics of personalised learning, demonstrating these values in action and showing how dialogue with learners and parents or carers can be conducted sensitively.

Personalised learning requires a particular set of values embedded in the culture of the school and the way it is led (West-Burnham 2007). Leaders will have to promote the new approaches, win the hearts and minds of teachers, pupils and parents and call on additional resources and expertise through networks and partnerships. Changes in systems and processes will need to be both introduced and sustained. Leaders should model what they expect of their staff, with a style of leadership in which the leader works with staff in personalised ways, addressing their particular issues and needs and tailoring staff development in very individual terms. The school leader can then facilitate personalised teacher learning as well as student learning and model a personalised approach to developing staff practice. Such an approach will become a highly visible characteristic of whole leadership teams in successful schools and also a way for the headteacher to work with the leadership team.

Extended schools

The notion of extended schools fits with a number of agendas. In some cases the provision of a more flexible curriculum and the meeting of individual needs will only be possible in the context of a wider partnership with other schools or colleges. Tackling some of the blocks and obstacles to personalised learning may involve offering support services and additional learning opportunities to pupils and families and, at the same time, providing additional services and access for the wider community. Many schools are also co-operating and or developing federations

and trusts to increase leadership capacity and to support the delivery of more joined-up outcomes across their localities.

Research on school collaborations has reflected findings from outside education that leadership is central to collaborative success. The required leadership is both strategic – from the local authority and/or key professional figures in the locality – and operational, from a partnership co-ordinator with specific time and resources to undertake the task (Woods et al 2006). The complexities of such arrangements between schools have increased the need for financial, business and administrative competencies within the leadership team. There is evidence that such schemes not only make good use of posts like that of school business managers but can thereby achieve cost savings and enable headteachers to focus on learning and teaching (NCSL 2007b). The challenge here is for the school leader to understand the financial detail so as to meet accountabilities and to ensure plans express values and priorities consistent with an overall vision for the project. Early examples of extended schools showed that leaders had very different and often quite specific visions of what they were trying to do and why, and this, in turn, impacted on the styles and structures they used (Kendall et al 2007). Developing and articulating such a vision to all staff and partners in the project is a prerequisite of success.

Every Child Matters

The Children's Plan has a vision of the 21st-century school working regularly with other, often specialist, services for children and needing them to be available on demand – services such as health (including mental health and speech and language therapy), early years and childcare, behaviour, youth and crime prevention services. Such a school will be an active partner in children's trusts, both helping to define the priorities for their local area and planning and delivering a whole pattern of services that together

meet community need. Schools are only one contributory factor influencing a child's education. Parents, especially of children up to the age of 11, and the wider community have an impact on a school's performance. Building social capital is an important aspect of the improvement agenda. The range of partnerships envisaged, with some complex inter-agency contracts and other agencies coming in to work within schools, take school leaders in new directions. They will have much to learn from managers in other public services who have undertaken such an approach over many years.

The sustainability of such developments will be dependent on good distributed leadership and clear communication of a vision for these new ways of working. Such visions may involve a reframing of what schools are for. Without moving away from their core tasks in improving the quality of teaching and learning, schools are being asked to engage with a wider range of social and community factors which help every child to succeed. In engaging with others, leaders will want to assess the potential barriers to partnership, looking at the history of relationships between the partners, structural obstacles to collaboration arising from differences in funding, accountabilities or geographical remit and cultural differences in terms of how different professionals work and communicate. In such a context headteachers may have to learn to operate within different professional cultures and to relate to professionals from different backgrounds working on sometimes quite different bases. In order to represent the school's needs, concerns and contributions in this wider community debate, they will have to understand the points of view and priorities of other agencies too. There is likely to be some inertia if the history of collaboration in the past has been painful or if the outputs are negligible or slow. It may be helpful to identify some outcomes that would not be possible for any one agency operating on its own and which meet the concerns of all the partners in terms of providing a quick sense of positive achievement (Paton & Vangren 2004; Atkinson et al 2007, Higgins et al 2008).

Pilot projects suggest there are leadership practices which offer leverage for the *Every Child Matters* (ECM) agenda, skills which push leaders out beyond learning-centred leadership: navigating national, local and community politics; engaging staff, students and partners in a vision of the purposes and ethos of the school; shaping school culture and ethos pro-actively around children's needs; creating structures for shared leadership and fostering trust; managing workforce re-modelling with sensitivity; prioritising professional development of all the staff; managing the permeable boundaries with the community; and ensuring sustainability of commitment, finance and resourcing. Such negotiating requires high-level interpersonal skills, with school leaders trouble shooting well beyond the traditional classroom situation. Leaders will require a grasp of organisational aspects for inter-agency working, clarity of purpose for both the project and for the school's involvement and the capacity to build trust and mutual respect (Atkinson et al 2007; University of Warwick 2007; Kirwan et al 2008).

Leaders can both secure staff buy-in, and remove the possible hostility or blocking tactics of those who can feel threatened, by articulating within the school a vision which links these new arrangements with staff concerns about children's learning and the standards agenda. One helpful way of integrating these has been to write school development plans around the ECM five target areas so that everyone feels some ownership and involvement with this agenda.

Experience in pilot initiatives has identified some of the challenges for leaders: concerns about funding, the sustainability of additional support for children and families as a result, difficulties in involving all the relevant agencies and achieving a shared responsibility. It can also be difficult to see immediate results and so justify to staff the amount of time leaders spent on this work. There are problems for school leaders when they have no authority over partners operating on the school site. They need to balance respect for

the professional expertise of other agencies with the need for clear protocols for agencies working on the same site. Local authority involvement and commitment will be critical in helping the headteacher navigate through difficult new territory.

As in other policy initiatives, leaders will find themselves moving into an arena where multiple stakeholders are involved, each with the potentially competing interests and not all sharing the same focus on learning processes to which schools must give priority. Juggling a variety of users and stakeholders has become a theme of these new policy agendas and requires skills of its own. The emphasis on partnership and network-based working in federated and multi-agency projects requires a collaborative approach that contrasts with traditional models. Leadership skills will include a grasp of organisational designs appropriate to these new purposes and an understanding of the subtleties of governance and accountabilities. Leaders may need help in understanding appropriate commissioning structures for new services and in devising ways of evaluating services that meet the various different agency agendas.

Important issues about trust will arise – both between partner agencies and within leadership teams. Mutual trust and a culture of focusing on problem solving rather than blame are required when there is a risk of exposing the practice of particular agencies. New initiatives will have to win community credibility and then be negotiated through various levels of interactions, from the contacts between different types of staff and with agencies' middle managers, through the operational and strategic relationships between local partners to broader national agendas that might place tensions on local networks. Leadership skills include: managing the meaning of projects, influencing people and building relationships, building trust through an ethos that is shared and encourages confidence and ensuring there are resource advantages to be gained from the partnerships.

14–19 learning agenda

Secondary school heads are having to take on board the implications of the 14–19 agenda in terms of partnerships with other providers in order to offer the range of provision that is beyond one single school. Here again the school's inability to deliver the national entitlement in isolation will undoubtedly require partnerships with other schools, colleges, universities, employers and training providers. There will be complex issues about lead responsibilities, accountabilities, funding and governance arrangements, which are likely to require negotiating, networking, representational and strategic skills. It is possible to argue that these partnerships are of a different order from any ECM links for a primary head and that this (together with the relative size of institutions) is already beginning to be reflected in quite distinct models of school leadership in the different phases.

In respect of the 14–19 agenda it is clear that leaders will need a grasp of the economic and business context of the school and the complexity of the local and regional job markets. Even if they are assisted by specialists in accessing this information, they will need skills in analysing it in order to identify more clearly the school's options in trying to best meet student needs. School leaders are likely to find themselves in dialogue with local businesses and employers in a way that will be new for many of them. Schools will be engaging with some powerful and well-resourced stakeholders and there are dangers of particular stakeholders capturing the school's agenda or undermining the school leader's independence. Taking unpopular decisions can become difficult without some independent support and schools may find themselves balancing accountability to government with community accountability and engagement with local interest groups. Higher order leadership capacities are needed to manage these tensions and dilemmas with competing interests.

Sustainable Schools

The Sustainable Schools programme is aimed at developing the environmental and ecological approach of all schools with some striking examples of pilot schemes in this field. It is clear that ecology encourages systems thinking and poses particular challenges for school leaders. It is useful for all leaders to look at their school as part of a wider system (families, neighbourhoods, local networks based on faith, ethnicity etc) and to examine how the school relates to these in ways that support the wider development of every child. Such systems thinking is helpful for working within the school as well, but an outward-facing focus for schools can also raise challenging questions about what constitutes the 'community' and who are to be related to as 'community leaders'. There is evidence that this outward focus in respect of issues of 'race' can give access to a variety of special funds under various social inclusion initiatives with important consequences for achieving improved attainment by pupils from minority ethnic groups. Enhancing the achievement of Black Caribbean pupils in particular requires leaders to ensure a school ethos that gains the confidence of parents and the local community as well as pupils (Lewis & Murphy 2005).

Some overarching issues from the new policy agendas

This range of new policy initiatives poses challenges for leaders in terms of their greater organisational complexity, the variety of communication, relationship and negotiating skills required and the grasp of local issues needed for a more outward-facing focus. Although they reinforce the value of a leadership team they may set up a tension between the wish to adopt a more distributed leadership style and the fear that some legal and accountability constraints prevent already over-stretched heads from delegating matters for which they feel a special responsibility.

The ability to distinguish between accountability and responsibility, clarity about what the priorities are, realistic expectations about what is possible, are all required if the role of school leaders is not to become unmanageable, and undertaking it not to appear too daunting.

New skills in working co-operatively with other schools or other agencies do not fit well with a top-down model of management. All of these initiatives would seem to encourage school leaders to 'get inside the skins' of other agencies or partner schools, to understand the culture and language of partners and to be aware of their priorities. Such an appreciation of another's point of view is one aspect of emotional intelligence. Partnerships also require a high level of self-awareness from leaders, with an ability to reflect on what is going on for others and for themselves (Paton & Vangren 2004). This reflective capacity and skills in building lateral rather than hierarchical relationships are also assets when dealing with internal school issues whether with pupils, staff or parents. Change in most organisations has shown that so-called soft skills around interpersonal relationships and motivation of individuals are critical and dysfunctional practice in this respect undermines any change programme (Glatter 2004). Dissonance between expressed values and the leader's actual practice will be quickly picked up by staff, community partners and pupils alike, so that consistency between espoused values and leader's action are the basis of credibility.

The concept of leaders being 'context literate' therefore needs to embrace a context wider than just the school and to include grasping important social and economic data about the communities they work with and identifying what offers the most value from within the potential inter-agency agenda. Leaders who have a good understanding of their community will be able to make sound judgements about how best the school can make a contribution to the locality. Schools are not discrete from communities and much may therefore be learned from seeing the school as part of a wider system in the locality

with a more outward-looking orientation than leaders have had in the past. Looking for 'quick wins' in order to establish the credibility of the new initiatives needs to go alongside working towards 'win win' outcomes for the partners (University of Warwick 2007).

These new policy agendas involve innovation rather than maintenance of existing services and structures and, in any setting, innovation can be very hard for leaders trying to manage other routine leadership tasks alongside this work. Support from consultants/mentors may help leaders to understand the process of innovation and its different stages. The levels of complexity and unpredictability are high, with risks of standards slipping during transition periods. The leader's role will be different at each stage and there seems value in the principles of project management as currently being used with many other public sector managers in health, social services and criminal justice.

The concepts of wisdom and deliberation mentioned earlier seem particularly appropriate to that combination of analytic and creative capacities needed in the potentially chaotic stages of any innovation. The language of problem solving can also be useful in addressing these issues, as part of the difficulty is the challenge posed by what have been described as ill-structured problems faced by school leaders amidst more recent agendas (Leithwood et al 2006a).

The notion of the school leader as leading change is too often conceived in terms of change driven from the top, but much public sector research suggests innovation is better nurtured than mandated. Bottom-up innovations, initiated and driven by informal leaders, can too easily be stamped out by senior leaders pre-occupied with other agendas, when it might be better for them to create the organisational climate that supports rather than stifles innovation from below. Lessons from other sectors suggest that development approaches aimed at improving the organisational climate can be highly productive (Hartley & Hinksman 2003).

Managing change requires leaders to strike an appropriate balance between change and stability and between control and flexibility. The capacity to judge these balances effectively at any particular stage of the innovation is another aspect of the judgement and wisdom referred to earlier: requiring learning from experience, good reflective capacities and a good knowledge of the moods and motivation of those one is working with.

Just as it made sense to say that learning-centred leadership was an obvious style in institutions where the focus was learning and the main customer was the pupil, so it may be necessary to ask questions about whether, once the focus of schools has widened to the overall well-being of the child and the school's users have become a much larger group, the leadership style needs to be broadened to incorporate these changes. While not denying the importance of pupil learning as core to the school's purpose, leaders need to have thought through this wider vision of the school's role and to have a more connected vision of how these different aspects come together and reinforce each other. This may be based on a broader understanding of pupil learning, incorporating personal development, physical and mental health, relationships, values and attitudes to the environment and fellow human beings.

4 Effective leadership development

A previous review of school leadership development proposed a set of ‘polar models of leadership learning’.

Polar models of leadership learning

Traditional leadership learning	21st-century leadership learning
Prescribed	Emergent
Standardised	Personalised
Offsite	On site
Classroom-based	Work-based
Content-led	Process-rich
Scale	Depth
Leader development	Leadership development

Source: Bush et al 2007

This helpfully provides a starting point for identifying the range of leadership learning that might be required on a continuum between the two models. There will be a place for activities using the traditional model, but more experienced leaders are likely to get more from programmes based on the emergent model. The needs of each target group must be considered separately. In general, the evidence from many contexts suggests that moving development opportunities towards the right-hand column will produce better and more sustainable leadership learning. Developments which focus on the work context and on the leadership team as a whole will have more impact on the school; learning which is personalised in terms of individual leaders and which focuses on process rather than content will be more likely to be transferred into leadership practice.

In fact the right-hand column’s characteristics are not necessarily new and arguments for a process-rich work-based approach to leadership learning go back a quarter of a century in terms of the recognition of the changing nature of schools and the social context of education in global, technological and economic terms. (Glatter 1972). The issues of soft leadership skills using affective capacities and the reflective processes of reading the context and learning from experience, all described in the last section, benefit particularly from the notion that leadership is a craft best learned on the job. It is often passed on through effective role models in the workplace, mentoring and coaching with real-life problems, and opportunities to rehearse, practice and reframe particular interactions with rich feedback (Hallinger & Kamontip 2005).

While these are good points, judicious leadership development planning will also recognise that, even when the focus is on process, learning needs well-structured stimuli, and well-thought-out guides to reflection and feedback, if we are to maximise the value of experiential learning. There are some limits to collective leadership developments in those contexts where teams can experience high turnover or where the culture and climate of the school reduce the impact of team development. Indeed all leadership development is dependent for its effectiveness on a range of variables – not all of which are directly under the control of those designing or running the development programme. Studies outside education have demonstrated that of the many factors which might be expected to influence a leader's workplace behaviour after a training programme – factors such as the immediate effects of the course, the relevance of training to the job, the leadership climate, the trainee's personality and motivation or the responses of the trainee's colleagues – only one is directly dependent on the quality of the course. While those designing and commissioning leadership development can do something to ensure matching of the programme to variable needs and styles, and can support the groundwork in the work context for transfer of learning, there is always a risk that the programme will accomplish little of itself *however good it might be* (Warr et al 1970).

In identifying the complexities of school leadership and talking of the higher order capacities required there is a risk of appearing to undervalue the crucial basic management competences for the role. On the contrary, it is increasingly clear to us that school leaders share with many other middle and senior managers in the public sector the need to achieve some elementary competences relating to those internal processes which focus on performance and hard measures of outcome. Lofty concepts of the headteacher's role and notions of heroic leadership are likely to conflict with more basic organisational tasks. This odd juxtaposition of idealism and attention to values with practical skills in

managing systems and large groups of people is captured in the suggestion that educational management is much like 'creating bus schedules with footnotes from Kierkegaard' (March 1978: 223). Management must be taken as seriously as leadership and the effective operation of routines and systems, with motivational interactions with those who must deliver on goals, is the way that visionary and inspirational aspects of leadership are translated into practice.

There are uses of the term 'management' which seem to look down on it as if it were mere administration or maintenance and stability. The management of change and the strategic taking of risks is part of the management repertoire and we need to define more clearly the behaviours behind core leadership skills. Management behaviours are a vehicle for leadership and it is helpful to distinguish between strategic and operational management, to talk about leaders modelling management for others and to recognise the creation of organisational culture as a management task (Lewis & Murphy 2008). It is to be regretted that the relevance of some specific management skills (such as the management of information and knowledge, resources management, project management, the management of communication systems and decision-making skills and the organisational development skills of leaders) has not always been given attention in school leadership development (Glatter 2006).

These cautionary notes help us to recognise the value of leadership development that works right across the continuum established in the table above. Those commissioning and designing leadership development, at whatever level, need to think carefully about the appropriate point on this continuum for their activities and explore in some depth the needs and attributes of those they seek to develop. This will then help with some difficult issues about the right methods for development programmes. It is useful to refer to typologies that distinguish between different areas of leadership development such as:

Knowing that: issues of cognition, the transmission of facts, receiving information, gaining understanding of useful theories

Knowing how: developing skills, useful management tools and techniques

Behaviour change: doing things differently in the workplace

Achieving changes to attitudes and feelings (Burgoyne & Williams 2007)

Different delivery methods suit some of these aspects more than others and matching methods to objectives sits alongside providing appropriate and varied methods for different learning styles. There is a tendency in high-profile leadership development to imagine that input-driven sessions with high-quality presentations, prestigious and motivational speakers, and glossy handouts are the preferred choice. For many of the crucial behavioural and affective aspects of leadership it will be much more effective to offer experiential learning sessions, to provide structured support elements (such as coaching, mentoring, e-learning resources, web discussion space etc), or project-based work undertaken in their own school or through visits to other schools, or through journaling or action learning sets engaged in problem solving and learning from experience.

Those who design learning activities for pupils and students will take naturally to the idea that one should select methods appropriate for different purposes or kinds of knowing, and while input-driven methods may be most suited to changes in cognitive areas, changing behaviours or working on attitudes and feelings is likely to require experiential learning or structured support. It is of interest that in comparison to leadership development in other sectors some methods (such as e-learning) appear not to be so popular with programme users. While the reasons for this might be explored and the design of such e-learning reviewed and improved, it may sometimes be necessary to explain openly to participants why a method is appropriate to purpose, even if it is not one participants like (Bush et al 2007).

There is certainly some recognition among school leaders that the higher order capacities referred to above are best developed through intensive peer interaction, guided by an experienced and skilled mentor from outside the group. It is important to avoid anecdotalism and the risks of collective whining or mere hand wringing that can cause participants to switch off. Skilled facilitation needs to promote accurate analysis and diagnosis, drawing out those skills and approaches which participants might then apply and practice in other situations (Cave & Wilkinson 1992). The most valued activities among school leaders are networking, either face-to-face or in highly purposeful school visits. In all instances it is important to evaluate the matching of methods to programme purposes and to do so in ways that get beyond just the participants' reactions.

The prevalence of distributed leadership models would support the value of more development activities focused on whole teams. One of the dangers of individualised training is that participants can return to the workplace fired with enthusiasm but then face hostility or indifference from colleagues who have not shared that experience (Hartley & Hinksman 2003). Leadership development and management training in all sectors has suffered from weakness at this point of re-entry and programmes designed for whole teams or multiple participation from the same school can help overcome this. It still remains the responsibility of school leaders to promote a positive learning environment for all staff to help embed the gains from any development activity. There is a duty to ensure that the right people take part and are appropriately supported on return by those who understand the focus and purpose of the programme. A particular challenge arises when, as part of the new agenda on inter-agency work in schools, there is team participation in leadership development across several organisations. Again there are lessons to be learned from experience in other sectors where inter-agency leadership training is perhaps more established. Where such approaches work well they can be powerful engines for further collaboration.

It is important to recognise that leaders, like their colleagues, require CPD and this should link formal structured learning opportunities with the many informal on-the-job opportunities to practice and learn from experience. There is much evidence from elsewhere that organisational culture and support systems can make or mar such opportunities (Eraut et al 2002). Possible problems on re-entry are worsened if the workplace culture is not receptive to trying new concepts and approaches or if risks and uncertainties are seen as a barrier to innovation. Leaders have to create and sustain a climate that is conducive to learning. They can do so both through the systems and routines of the school and through the quality of individual interactions.

There are tensions to be managed in designing leadership development initiatives. It is tempting to adopt greater customisation so that participants have more involvement in choosing their own learning pathways, but this has to be set against whether current or emergent leaders are themselves aware of what they need to develop. They may need the support of a senior leader or mentor in identifying weaknesses they are uncomfortable in recognising or possibilities available of which they are simply unaware. Individualisation can also cut across the team approach to organisational development. There is some skilled negotiation to be done to ensure that individual development has both personal and organisational pay-offs. It also needs to be acknowledged that the flexible and responsive facilitation of individualised leadership development requires high levels of skill and is a demanding activity (Bush et al 2007).

A compromise adopted in many UK and US leadership development programmes has been to build in experience-based elements such as simulations, project work, field visits and internships, alongside formal aspects. Such mixtures are potent when integrated and handled well, but evidence suggests

that internships, like visits to other schools, need careful preparation and planning by the participants and the receiving school. Early studies suggest these approaches need careful management and monitoring, but there is some evidence from the US that lengthy internships in which meaningful leadership work can be undertaken can be particularly important in developing those higher leadership capacities (Earley et al 2007).

These suggestions highlight the value in working in a variety of contexts and experiencing a raised awareness of organisational culture through contrasting the familiar with some new experiences. Such planned and structured widening of experiences is a feature of leadership development in many other sectors, but has not been a distinctive feature of CPD in schools until very recently. It is important to recognise the need to build in the time and support for good reflection on professional practice and future directions if such experiences are to be a viable part of a process which links leadership development and career planning and which places it in the wider context of a total organisational approach to the development of all staff. There is still some way to go before such a broad approach is seen as integral to effective leadership skills.

The challenge of the new policy agenda on inter-agency partnerships and the arrival in extended schools of staff from other disciplines introduces a new mix of staff: challenging leaders to better identify and meet staff development needs across a disparate staff group – an approach which might prove difficult unless a strong culture of CPD is in place for everyone, including the school leaders themselves (Kendall et al 2007). We come back then, at the end of this section, to the realisation that staff development and self-development are important and skilled aspects of core practice for school leaders.

5 Key themes and challenges

Effective school leadership

Some key management skills

School leaders are not alone, within the public sector, in needing to develop specific behaviours and practical tools in respect of management skills that go well beyond 'administration':

Managing change: transforming schools requires leaders who are proactive and are comfortable with change not as a one-off, but a continuous orientation. Leaders need to take responsibility for monitoring what is going on during change, communicating well with everyone and securing collaboration by harnessing the strengths of their whole team. High expectations and belief in what can be achieved will motivate everyone. For these purposes there are change models, diagnostic tools and frameworks for problem solving which might be imported more effectively from other sectors.

Project management: without needing to adopt some of the more complex project management tools, school leaders can benefit from some simple project management approaches valued by other public service managers. There are useful frameworks for clarifying the processes and stages of any new plan, for identifying the risks and contingencies, developing the project team and holding things together to time and within costs.

Information management: learning-centred leadership and personalised learning highlight the complexity of data interpretation and analysis and the need to be able to communicate information clearly to others. Developing indicators of school culture, pupil engagement and collaborative processes

will all require an input from those who are at home with more complex performance measures, reflecting both factors in the school and in the community.

Financial management: despite the introduction of financial specialists into school leadership teams, headteachers and other leaders need a high degree of financial literacy to interrogate accounts, to ensure financial planning reflects the overall school vision and to work with partnership funding and service contracts.

Leadership and culture

Given the importance of both classroom and staffroom cultures, school leaders need to be able to diagnose and change organisational and group cultures:

School culture: simple diagnostic tools could help leaders to ensure that appropriate values are central to school culture and that concepts such as respect, fairness, sustainable living, celebrating achievement and mutual support are articulated in all aspects of school life. Staffroom culture is critical to opening up dialogue about in-school variations and shared improvement of teaching practice will not work where professionalism is seen as individualistic practice or people fear a blame game will be played.

Leadership and culture: the leader's attitude to their own mistakes can be the first component of a more healthy organisational learning culture. The leader needs consciously to create a strong sense of being a professional community, embodying norms of collective responsibility and shared goals, with professional development, reflective practice and quality improvement practices all part of the routines. The school as a learning organisation makes leadership something teachers potentially know more about than most, rather than an alien territory to be learned from scratch. Unhelpful gendered models or images and language from inappropriate commercial and military cultures are to be avoided.

Leadership style

Effective school leaders will demonstrate a responsiveness, self-awareness and commitment to their own improvement that will be motivational for all their colleagues. Some of the components will include:

Self-management: good leadership needs a clear system of prioritisation, a sense of strategic timing and the making of informed and conscious choices about what to do and what to leave. Juggling the short-term and the more strategic will come naturally to leaders who can both take an overview and, when necessary, intervene. Such leaders will have a level of self-awareness that enables them to manage their own emotions, to recognise the impact they are having on others and to manage their own energy levels. Such self-awareness will then be the basis for heightened awareness of the perceptions and motivations of others.

Responsive leadership: recognising difference and awareness of others is a crucial step to getting the best from everyone. Responsive leaders will know how to use the respective strengths of other members of the leadership team and be able to spot and build on the skills of even relatively new staff members. Interactions will be personalised, engaging and influencing all those with a stake in the school, working with integrity and building trust.

Self-development: effective leaders model good CPD practice as they are seen to be actively learning too. If they are to act as a coach to staff and to other leaders then they must be seen to be benefiting from coaching for themselves – both in preparation for leadership and post-appointment. Support networks, consultancy and mentoring will help leaders to be aware of their own possible weaknesses in over-reliance on some methods or tendencies to avoid certain aspects. The leader's approach to their own development will then be consistent with a commitment to development for their staff and leadership team.

Systemic leadership

Systems thinking will take effective leaders beyond a pre-occupation with structures and hierarchies to an awareness of processes and an interest in the inter-connected nature of the many systems within and beyond the school. Valuing and working with diversity, they will want to work on the boundaries of the school with other systems and see themselves and the whole school as engaged on an evolutionary journey. The professional development of such leaders will thus be characterised by a holistic approach, with good feedback systems in their own development and lots of practice in reflection and learning from experience.

Effective leadership development

All the points above help to underline some of the features of effective leadership development highlighted earlier in this report and some key themes looking ahead:

Good leadership development will work on the core management knowledge and skills identified above. It will give adequate attention to the higher order capacities, combining analysis with creativity, developing affective capacity and building authenticity and trust in the leadership of people. Leadership development will strengthen those skills that are effective in collaborative and partnership ventures. As an aspect of user-centred leadership, it will support leaders in seeking feedback from all stakeholders who experience the leader's impact. It will make strong connections with work-based learning and the leader's own skills in creating a workplace climate that promotes learning for everyone.

Providers of leadership development, from national to local levels, will need to ensure that methods are well suited to purpose and that programmes are rich in process experiences and structured networking opportunities, avoiding excessive content. Individualisation will ensure appropriateness to the stage of

career and needs, school context and personal learning plans. Leadership development activities will be well planned and have high-quality, experienced facilitation and support. Given the value of work-based learning, providers may have to develop materials for this and work in partnerships with schools and individual leaders over relatively long periods of time. There will be particular value in taking account of the encouraging research results relating to mentoring, internships and 360° feedback and securing the right conditions for these. Work with employers will ensure that career and professional development are aligned as closely as possible and choices openly explored.

Further work to be done

Just as school leaders have to work with uncertainty, so we would acknowledge that there are still some things we do not know enough about. Studies of school leadership can be improved. They have rarely been longitudinal and most involve highly selected samples. There is less evidence about what sustains improvement or moves schools from 'good' to 'excellent'. International studies of school leadership point up some parochial cultural and policy assumptions that are to be challenged. Through more dialogue with other parts of the public sector school leadership could both learn much and contribute a great deal to a broader debate.

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