Chapter 5

Approaches to learning leadership development in different school systems

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*This chapter presents a selection of the leadership initiatives and analyses gathered through the Innovative Learning Environments project. Tanja Westfall-Greiter describes the strategy of creating teacher learning leaders (*lerndesigners*) in the current Austrian reform (*Neue Mittelschule *or NMS). Judy Halbert and Linda Kaser discuss a leadership programme in British Columbia, Canada that engages leaders together in a "spiral of inquiry" about learning in their own school and networked activity across sites. The New York City examples described by Roser Salavert cover Professional Learning Communities, coaching, teacher teams, and student "voice". Lone Christiansen and Per Tronsmo present Norwegian approaches to leadership, and national programmes for school leadership professional development and the Advisory Team programme for mentoring principals and local providers. The South Australian and Israeli examples presented by Susanne Owen and Dorit Tubin feature the work of particular sections of the education ministries looking to drive innovative learning and provide conditions to support it.*

Introduction

Leadership naturally features in the strategies and initiatives brought together as part of the Innovative Learning Environments project. This chapter presents a selection of these. They are diverse and operate at different levels. They complement the conceptual and research-based discussion of the foregoing chapters by presenting diverse applications and learning leadership developments in different systems covering a range of educational traditions: Austria; British Columbia, Canada; New York City; Norway; South Australia; and Israel.

The teacher learning leaders (*lerndesigners*) that have been created in the current Austrian *Neue Mittelschule* (NMS) reform represent an excellent example of a strategy that is operating at once at the micro, meso and macro levels. It is working on innovating learning in individual schools through change agents, creating conditions for them to network together, and is aimed at helping to drive the system-wide innovation reform. The leadership programme in British Columbia, Canada (Certificate in Innovative Educational Leadership, CIEL) is a year-long graduate programme for practising formal and informal leaders. It is highly focused on innovative learning, it engages the leaders together in a "spiral of inquiry" about the nature of learning in their own school or learning environment, and it networks these different leaders after completing the programme.

The examples of learning leadership strategies and initiatives from New York City represent a range of approaches and levels of action. They cover innovation through professional learning communities, coaching aimed at developing distributive leadership, facilitating inquiry through collaborative teacher teams, and strategies for recognising and promoting student "voice". The Norwegian examples are systemic in being created as part of broader school reform and implemented by a national agency under the ministry in a system that is highly decentralised in its governance arrangements. The two initiatives presented are a national programme for school leadership professional development and the Advisory Team programme for mentoring principals and local providers to develop quality learning.

The South Australian and Israeli examples feature the work of particular sections of the education ministries looking to drive innovative learning and provide conditions to support it. The team in the South Australian Department for Education and Child Development operates in diverse ways, including conferences and workshops, an innovations website, part-time advisory support from an innovation principal, practitioner research grants with academic support, and innovation newsletters. Particular attention is paid to the Innovation "Community of Practice". The Israeli Experiments and Entrepreneurship Division aims to encourage the motivation and practice

of learning innovation, alternative teaching and learning methods, and the design of innovative learning environments. The discussion is founded on an analysis of the conditions for system-level learning leadership.

A network of change agents: *Lerndesigners* as teacher leaders in Austria
(Tanja Westfall-Greiter)

The Austrian school reform initiative *Neue Mittelschule* (NMS) began in 2008 in 67 pilot schools and has since led to a mandated school reform that will be completed in phases by 2018. National guidelines for pilot schools were released by the Ministry for Education, Arts and Culture in 2007, based on which each state province (*Bundesland*) developed its own pilot guidelines and requirements. This federalist approach to the pilot created nine broad pilot regions defined by provincial boundaries. Participating schools opted in by submitting a pilot concept for their site that was in line with requirements of both their *Bundesland* and the ministry. Applications were formally approved by a review board at the ministry level. Although the NMS is now a mandate, this opting-in process is still in place, enabling at least some dynamic of ownership for those schools which are implementing rather than piloting.

The *NMS-Entwicklungsbegleitung* (NMS-EB), an external consultancy team, was hired by the Ministry to guide system development during the pilot. The NMS-EB created networking events, engaged system players on all system levels and initiated a new role, "*Lerndesigner*". *Lerndesigners* are teacher leaders with specific expertise in areas of curriculum and instructional development related to the reform goals of equity and excellence. Each NMS site designates a teacher to be the *Lerndesigner,* to attend national and regional "*Lernateliers"* as well as local networking events. Ideally they act as change agents in a shared leadership dynamic with school principals and other teacher leaders (subject co-ordinators, school development teams, etc.). The rationale for creating, qualifying and networking change agents was clear and focused: transformation at all system levels occurs when change agents are networked and establish communities of practice.

The reform pilot came to an end in September 2012 and along with it the NMS-EB external consultancy. To sustain positive change and foster learning environments which are equitable and challenging for all pupils at NMS sites, the ministry established the National Centre for Learning Schools (CLS) in 2012. Co-directed by members of the original NMS-EB team, two central objectives of the CLS were, first, to sustain and foster school networks and communities of practice, and, second, to support *Lerndesigners* as change agents through qualification programmes, symposia and networking.

The Lerndesigner *network*

The fundamental aim of the *Lerndesigner* network is to foster the development of effective learning environments at each school, driven by the principle of school-specific reform (Marzano, 2003) and focused on the goals of equity and excellence. The strategy lies in qualifying teachers to become teacher leaders, thereby enabling them and their schools to realise effective shared leadership. DuFour (2002) argues that the central task of school leaders is to foster the disposition and structure of professional learning communities. More than ever before, school leadership needs to focus on student achievement and foster a culture of learning throughout the school.

Barth (2000: v) points out, however, just how complex and demanding the concept of "learning schools" is:

> "Our school is a community of learners!" How many times do we see and hear this assertion, now so common in public schools? This is an ambitious promissory note, indeed. The promise, is, first, that the school is a "community," a place full of adults and youngsters who care about, look after, and root for one another and who work together for the good of the whole – in times of need as well as times of celebration. I find that precious few schools live up to this mantle of "community." Many more are simply organisations or institutions. As if "community" were not enough to promise, a "community of learners" is much more. Such a school is a community whose defining, underlying culture is one of learning. A community of learners is a community whose most important condition for membership is that one be a learner – whether one is called a student, teacher, principal, parent, support staff, or certified staff. Everyone. A tall order to fill. And one to which all too few schools aspire, and even fewer attain.

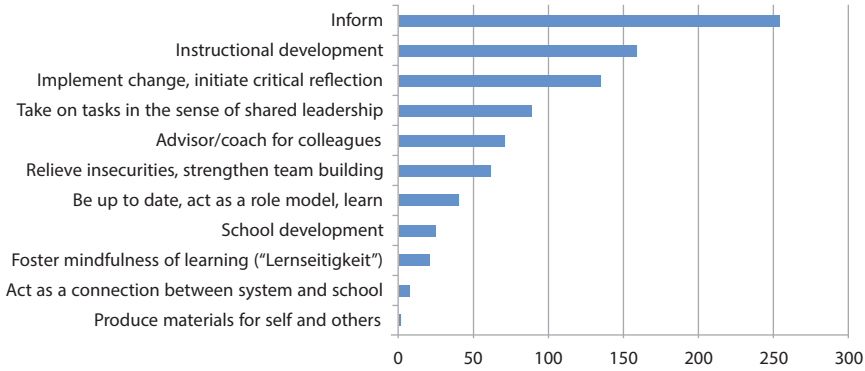
Typically Austrian schools have a flat hierarchy and school culture is dominated by the "autonomy-parity" pattern in which individual teachers enjoy equal freedom to control what goes on inside their own classrooms (Lortie, 1975) – a far cry from the "ambitious promissory note" of learning schools as vibrant communities (Schratz and Westfall-Greiter, 2010). Not surprisingly, the *Lerndesigner* role was and is a powerful system intervention. Because an official function for teacher leaders as *Lerndesigners* does not yet exist in school legislation and salary structures, each *Lerndesigner* creates his or her own role in the context of the school through processes of role-taking and role-making.

The *Lerndesigners* are also not alone. As a result of educational reform efforts throughout the system, several new teacher leadership roles have emerged since 2008 which have had an impact on schools' social architecture. In the NMS, these include contact persons or co-ordinators with specific

agendas required by the ministry (eLearning, gender issues, culture and arts programming, standards and school quality), school development team members and co-ordinators created at the school level as part of their school-specific model and roles required in the *Bundesland*-level guidelines, such as the "learning coaches" in Vienna. Of these teacher leaders, *Lerndesigners* are the most visible, in part due to their two-year qualification programme including national face-to-face events, but also due to their name. "*Lerndesign*", as the catch-all term for the new teaching and learning culture promoted through the NMS, was a new coinage that received some media attention early on and has become part of everyday vocabulary at all system levels.

The effectiveness of *Lerndesigners* as change agents in a teacher leadership role depends to a significant degree on the culture and leadership in their schools. An informal survey of Generation 2 and 3 *Lerndesigners* (those who began in the 2nd and 3rd year of NMS) in mid-2010 revealed how the role was developing (Westfall-Greiter and Hofbauer, 2010). These second and third generation *Lerndesigners* were asked to write a one-minute essay on the question, "What does a *Lerndesigner* do?" Responses were clustered and revealed their roles as that of teacher leaders acting in shared leadership with school principals as well as that of change agents:

Figure 5.1. **What does a *Lerndesigner* do?**



Source: Westfall-Greiter, T. and C. Hofbauer (2010).

As one *Lerndesigner* put it, "The *Lerndesigner* prepares the soil upon which the seeds of the new learning culture and assessment are planted." At the same time, the newness of the role brought with it uncertainty. By the end of the second pilot year, *Lerndesigners* had become important partners in school for asking questions and solving problems. As a *Lerndesigner* in

Generation 3 advised: "Listen when colleagues come with problems. Try to find solutions. Don't give up or get tired of asking questions. (Has something changed for the better? If not, why? How can that work?)" Nonetheless, the new role was not easy for some, as one teacher indicated: "The *Lerndesigner* is a difficult role at my school. I see my role in being a good example. Slowly the term is no longer being laughed at. Slowly the colleagues see that I do things differently. Slowly even questions are being asked – 'How do you do that…?'" (Westfall-Greiter and Hofbauer, 2010).

Beyond face-to-face events, communication and feedback occur online, a strategy which has been developed closely with a company contracted by the ministry to provide digital infrastructure and system development initiatives in the field of eLearning, digital media and digital competence. The NMS development is supported by an online platform comprising some 200 eduMoodle courses which is operated by the National Centre for Virtual Teacher Education (Onlinecampus VPH) in co-operation with the National Centre for Learning Schools. In addition, the NMS Online Library was implemented in autumn 2012 and serves as a portal for NMS-related resources, including dissemination of the newest resources for curriculum and instructional developed by CLS, a bi-weekly newsletter for school principals and insights into the NMS experience through personal anecdotes and a series of online events and publications called "NMS Insights" conducted by Onlinecampus VPH.

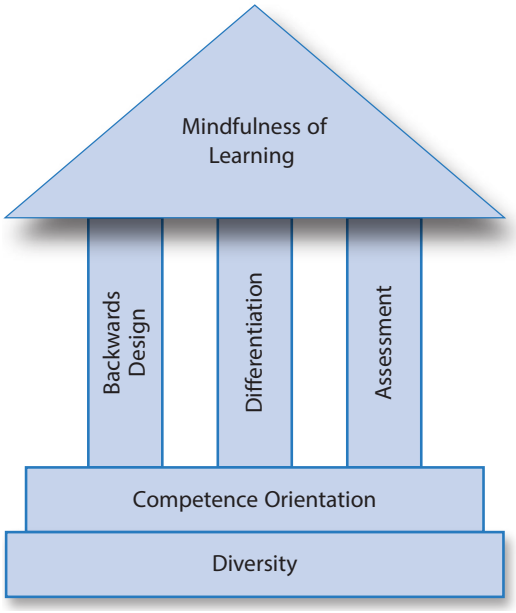
The qualification programme

The two-year national qualification programme for *Lerndesigners* contributes significantly to their profile. The programme enables them to gain theoretical and practical insights in areas of expertise related to instructional quality, to develop with one another the knowledge and skills necessary for them to be effective in their own schools as teachers and teacher leaders, and to network with other *Lerndesigners*. Developed and refined over three years in response to pilot schools' needs, the qualification comprises six development areas represented in the so-called "NMS-House" deemed essential for fostering change in the learning culture realised in each subject in each lesson of the NMS (Figure 5.2).

- mindfulness of learning (Schratz, 2009)
- diversity
- competence orientation
- "backwards design" curriculum development (Wiggins and McTighe, 2005; Tomlinson and McTighe, 2006)

- differentiated instruction (Tomlinson, 2003; Tomlinson and Imbeau, 2010)
- assessment (Earl, 2013; Wiggins, 1998).

Figure 5.2. **The "NMS House"**



Lerndesigners earn a certificate worth 12 college credits relevant for further study programmes towards a master degree. The programme design consists of national and regional *Lernateliers* for networking and qualification purposes as well as a self-study component which is co-ordinated online and includes practice-based tasks for exploration in school-based professional learning communities (PLCs). The "Meta-Course", the virtual networking and learning space for all *Lerndesigners,* is located on the NMS platform. This space is closed to visitors so that *Lerndesigners* can safely exchange ideas and receive feedback on their development work. The goals with this designated digital space are to:

- connect *Lerndesigners* across generations
- promote exchange, learning and development
- foster identity

- provide a location for materials
- enable direct communication between the national development team and *Lerndesigners*
- provide up-to-date information
- conduct intra-school PLC work.

The advantages of the Meta-Course for *Lerndesigners* were already clear in the pilot phase. It enables communication, exchange, regular contact, access to expertise and support as well as relationship-building.

As of 2012/13, Generation 5, this programme is a joint effort between the National Centre for Learning Schools at the national level and the *Pädagogische Hochschulen* (PHs), which is responsible for compulsory school teacher education as well as continuing education programmes and school development measures. This new structure called for prototyping at several levels. To foster the evolution of the programme and support the transition to the PHs, the Ministry provided financial start-up incentives for programme development. Five PHs agreed to participate in the prototyping phase. Programme directors and their trainer teams meet with the National Centre for Learning Schools twice a year. The curriculum, which had been defined with system partners in 2011/12, is the common basis for programme development.

Key strategies

Because the qualification occurs parallel to the implementation of the new school reform at their school sites, the qualification programme for *Lerndesigners* is the key national strategy for guiding school development at each NMS site. To foster transformation, school principals were also invited to national network meetings each semester in which they could address their own leadership issues. These network meetings for school principals have since been replaced by joint national *Lernateliers* for *Lerndesigners* and principals. Participants' feedback was very positive and this "dynamic development duo", as it has come to be called, has been recognised as key for the *Lerndesigners* to become effective change agents.

In addition, a strategy for maintaining the NMS network at the national level with Generation 1 and 2 schools whose qualification programmes had already concluded was first piloted in early 2012 in the form of two symposia. Dynamic development duos from schools no longer in the national programme were invited to a two-day symposium in which they could update their information and attend workshops related to NMS goals and development issues. The participants' feedback was overwhelmingly

positive so that three regional symposia were offered in December 2012 for Generations 1-3 and four are planned in January 2014 for Generations 1-4.

The main leadership of the *Lerndesigner* Network was the Minister of Education, Claudia Schmied, who initiated the NMS school reform, and Under-Secretary Helmut Bachmann, the NMS project leader. In addition to the already-mentioned partner institutions, the National Centre for Learning Schools is also networked with other national centres belonging to the Ministry, including the National Centre for Gifted and Talented Education, the National Centre for Multilingual Education, and the National Centre for Personal Development and Social Learning. The NMS project is also carefully linked with other ministerial education initiatives in Austria, including the implementation of standards (BiSt) and school quality for compulsory schools (SQA) as well as diversity and equity measures in various areas including gender, integration and special needs. Regular communication and a yearly retreat with key persons in the ministry ensure that the National Centre for Learning Schools development is coherent with these key initiatives.

Because the NMS-EB culture and those responsible at the ministry have focused especially on building relationships, individuals from NMS schools, local school authorities and PHs are in direct contact via email with members of the National Centre for Learning Schools and the NMS Project Team at the ministry when questions or problems arise. This is at once a strength and a weakness. Personal relationships enable targeted support, but a lack of staff makes it difficult to manage, particularly in phases where new information and requirements lead to a wave of individual questions. National meetings with school authorities, regional development teams and PH programme developers also take place biannually. Co-operation with directors and staff of the qualification programme for *Lerndesigners* is sustained with biannual work meetings and online exchange.

Evidence-informed development requires data. BIFIE (*Bildungsforschung, Innovation and Entwicklung des österreichischen Schulwesens*), Austria's testing and assessment institution, has conducted qualitative studies each year of the NMS pilot in co-operation with the Evaluation Committee (*Evaluationsverbund*) comprising representatives from local school authorities in all state provinces. The studies are conceptualised with the committee so that they can be oriented to their development questions and provide desired data. A qualitative survey of *Lerndesigners* in spring 2012 indicated the need for a formalised function in the system and otherwise confirmed the analysis conducted in 2010 by Westfall-Greiter and Hofbauer. The work in professional learning communities seems to have established itself well in the majority of schools, which was somewhat surprising because it was merely a recommendation during the pilot phase. Offering protocols and questions for PLC work seems to have contributed to this positive development.

In addition, a study of *Lerndesigners'* learning in the *Lernateliers* based on vignette methodology was conducted in 2011/12 (Kahlhammer, 2012), to gain key insights into such adult learning, and the National Centre for Learning Schools is also closely linked with the University of Innsbruck's Centre for Learning Research. Learning research conducted in NMS Generation 2 schools has been integrated into the qualification programme for *Lerndesigners* and methods for working with so-called "vignettes" were developed within the *Lernateliers* and published as protocols for professional learning communities (Schratz, Schwarz and Westfall-Greiter, 2012).

Further, the curriculum developed for the *Lerndesigner* qualification programme has been recognised by the Development Board of Teacher Education (*Entwicklungsrat zur PädagogInnenbildung,* NEU) and has influenced the new Master's degree programmes and the new curriculum guidelines for lower secondary teacher education. The recognition and integration of the six qualification areas of the NMS House in these broader contexts has led to synergetic strengthening in all reform efforts. In the same spirit, connections and synergies among the three primary reform initiatives for lower secondary mentioned above – standards, school quality and NMS – are communicated to all actors in the system to enhance effectiveness and impact.

Reform in lower secondary education has a long political history in Austria, driven by the issue of equity in the school system, and has also been the focus of recommendations from the OECD and the European Commission. The political commitment of the Minister of Education has certainly been a key factor in the success of the project, but the success factors of the reform pilot are very difficult to identify. In part, the time was ripe for many teachers and school principals at the lower secondary level. The minister also travelled to each state province for dialogue events with system players, which had a positive integrative impact and served to strengthen the determination to reform the lower secondary sector. In addition, the parents' network which emerged after a survey of parents in 2009/10 has been strengthened through newsletters and an online platform as well as a hotline service run by the NMS Project Team.

The power of national networking and change agents are generally seen as keys to the success, but these claims have yet to be supported by data. The NMS-EB focused on networking on all system levels, so that by the second pilot year the reform gained significant momentum and by the third year it became clear that the reform spirit could not be dampened. This is probably one reason why the school reform was mandated earlier than planned.

Factors related to the success of the *Lerndesigner* network are more easily identifiable:

- The online platform for *Lerndesigners* enables easy communication and exchange of ideas and innovations.
- Regular networking events in which the qualification is embedded build identity, professionalism and confidence.
- Personal relationships, support and easy access to expertise build trust.

There were many challenges to the successful introduction of the *Lerndesigner* role, in particular the acceptance by, and co-operation of, system partners at all levels. The form and establishment of shared leadership is a voluntary matter: if schools chose not to participate, nothing could be done because the external consultancy had no formal authority. The partnerships and support of the local school authorities have been invaluable in this regard; their strong recommendation and in some cases mandating of participation within the scope of their local competence led to a high participation rate on the part of the schools. Trust on the personal level has had a clear impact on this aspect of success. Other success factors for the development and implementation of the *Lerndesigner* role as well as the creation of a strong school network include the financial commitment of the ministry to enable national network meetings and qualification programmes as well as the co-operation and commitment of key players in the ministry to ensure the linking of development strategies with other initiatives and institutions.

The lack of security in salary schemes and school legislation for *Lerndesigners* means that a role exists, but a function does not. While all but one of the nine local school authorities have reached consensus regarding the importance of the *Lerndesigners* and advocate connecting the function to the qualification programme, until such a function exists they can only strongly recommend that schools comply. Other reforms, most notably in teacher education (*PädagogInnenbildung NEU*), are expected to strengthen the role and lead to the creation of the function in the long term. Agreements with trade unions regarding labour regulations for teachers will also have an impact on the long-term feasibility and effectiveness of all teacher leadership roles in Austria. The *Lerndesigners* are on the agenda of current negotiations with trade unions; proposals include additional salary as well as reduced teaching hours to compensate them for their work.

Education in Austria is highly politicised. While political will and support is generally strong in the ministry, this varies significantly at the local level, further exacerbated by the strong federalism which marks Austrian politics and decision making. A rigorous orientation to quality issues focused on school effectiveness and the academic achievement of learners is essential.

Innovative learning environments: Developing leadership in British Columbia (Judy Halbert and Linda Kaser)

British Columbia (BC) is by most measures a high-performing system in terms of both quality and equity. Yet, significant inequities exist and the political educational context is challenging. Tensions between the teacher association and the government have sometimes made it difficult for sustained progress at the system-wide level to take place. It is partly for this reason that for several years the authors have sought to establish "third spaces" outside the rhetoric of conflict where educators can engage in inquiry, experience new learning and try out new practices that will benefit their learners. The networks of inquiry and innovation (www.noii.ca) connecting schools across the province through focused inquiry is one of these "spaces". The CIEL (Certificate in Innovative Educational Leadership) graduate programme at Vancouver Island University represents another such space.

The CIEL programme is a year-long graduate programme for formal and informal leaders interested in transforming their schools to higher levels of quality and equity through inquiry and innovative practice. Both Canadian and international perspectives are central to the curriculum and a strong emphasis on indigenous ways of knowing makes this programme particularly relevant in the BC context.

The programme is designed to immerse participants first in the research knowledge about learning and leadership through an intensive face-to-face summer institute and then to take informed action during the school year. Working with a disciplined framework for inquiry, each participant identifies a key challenge for learners in their setting and designs new approaches during the school year. Regular reflections on the process of their inquiry as well as responses to a range of readings and online resources take place as part of an online community. In addition, participants are asked to explore the case studies from the Innovative Learning Environment project, identify an international case that is of particular interest – either because of its similarities to or contrast with their own setting – do additional research on the case, and then demonstrate how they will apply ideas from the case to their own context. Each participant works in a learning partnership with a colleague from their own setting and as part of an interdependent team with members of their cohort. Completion of the certificate programme leads to a unique design for completing a Master programme – with an emphasis on collaborative practices and problem-based learning.

A key aspect of the CIEL programme is that graduates have the opportunity to continue to extend their learning and deepen their connections upon completion through ongoing involvement in the networks of inquiry

and innovation. This layering of networked learning opportunities helps to sustain and extend their leadership influence.

CIEL builds on the previous experience of the authors in designing and leading a graduate leadership programme at the University of Victoria which was designed around seven key leadership mind-sets (Kaser and Halbert, 2009) identified from international research and substantiated by case studies in British Columbia. Both CIEL and the earlier programme have been informed by international research on school leadership development, in particular the work of Stefan Huber and Viviane Robinson. Huber's (2010) research on school leadership development indicated a number of characteristics evident in CIEL. These include:

- Leadership programmes need a clear and explicitly stated set of aims, using the core moral purpose of school as a focus.
- Programmes must be based on a set of values and educational beliefs.
- Development must be viewed as a continuous process.
- There is a need to shift from fixed bodies of knowledge towards the development of conditional and procedural knowledge, conceptual literacy and knowledge management.
- There needs to be an intelligent balance between theory and practice.
- The programme must have a strong orientation to the individual and actual needs of the participants.
- Inspiring collegial learning and intensive collaboration are key elements.
- Problem-based learning and learning opportunities at the workplace are central.
- Dual focus on the personal and professional development needs of the participants as well as a focus on transforming their schools is required.

Robinson's (2011) findings on the leadership behaviours that are directly connected to improved student outcomes underscore the importance of promoting, supporting and participating in professional learning. This is a key expectation for CIEL participants and is central to their individual inquiry initiatives.

With these overall design considerations, there are three aspects of the CIEL programme that are especially relevant to the OECD focus on innovative learning environments. The first is the use of *The Nature of Learning*: *Using Research to Inspire Practice* (Dumont, Istance and Benavides, 2010) as a

basis for in-depth study connected to the seven key transversals identified in the final chapter of this resource. Second, is the intense exploration of case studies from the OECD/ILE "Inventory" of innovative learning environments (see OECD, 2013, Annex A) as a way to prompt new thinking and action based on experiences in other parts of the world. Third, is the use of a disciplined spiral of inquiry focused on creating more innovative and engaging learning environments.

Learning principles as a core framework

The seven concluding learning principles from *The Nature of Learning* act as a set of cognitive tools in the leadership programme. CIEL participants study the research, explore each principle individually, enact inquiries to actualise the seven principles in their contexts, and present the results of their inquiries to their colleagues in a final presentation.

In addition – and this is extremely important to transforming leadership practices – participants experience all seven of the learning principles as a deliberate part of their own learning in the programme. Participants are immersed in problem-based learning and have regular opportunities for developing more self-regulated practices. All assessment is formative, with a significant emphasis on descriptive feedback. Social and emotional learning are strengthened and integrated with their colleagues through teamwork and collaborative inquiry. There is a strong emphasis on experiential and blended forms of learning. The setting for the face-to-face parts of the programme is purposefully in non-traditional learning environments. Getting the right degree of challenge without overload is especially important for graduate students who are fully engaged with their work responsibilities and active family lives in addition to their formal studies. The inclusion of community leaders from outside education as well as the expectation that participants connect across their settings helps to develop horizontal connectedness.

Currently we are working with the CIEL participants to develop a rubric based on the seven OECD/ILE principles for educators to use both as a diagnostic for their own settings and as a prompt for new action to deepen learning experiences for their learners.

Innovative cases to prompt action

The use of case studies from the "Inventory" of the OECD innovative learning environments has been highly useful in opening up thinking about new local possibilities based on the experiences in a wide range of vastly diverse settings. The case studies have served as existence proofs of innovation and deeper forms of learning. Chief Dan George, a wise elder from British Columbia said many years ago, "What we cannot see we cannot

respect." He was talking about the need for people of different cultures to be open to other ways of being. We have seen the same response from educators who can be heard sometimes to say: "That (new practice, new programme, new approach) will never work here."

By delving into the case studies, CIEL participants are asked to look beyond the apparent context differences to gain a deeper understanding of the case they have selected and then to consider ways they might apply what they have learned in their own setting. They are encouraged to go beyond the confines of the case study itself, to contact the school directly and to examine other resources readily available on the web.

As a result, a small rural school in British Columbia is drawing on the work of a nature school in Israel to shape and sharpen their focus on environmental sustainability. The BC school is now working as part of a small network of nature-based schools throughout the province to transform their settings. Another CIEL participant, a principal of Aboriginal ancestry in a remote community, is using the case study from Vilna, Finland as a model for creating a school with high levels of self-regulation and appreciation for the natural world. A middle school principal has transformed the practices and plans in her school by studying the staffing models and more flexible timetables of a school in South Australia.

The response to these evidence proofs from other settings has been extremely positive and is prompting actions in ways that were unanticipated. "Seeing" in this part of the CIEL programme is leading to deeper respect and to new possibilities.

The "spiral of inquiry" as a framework for transformation

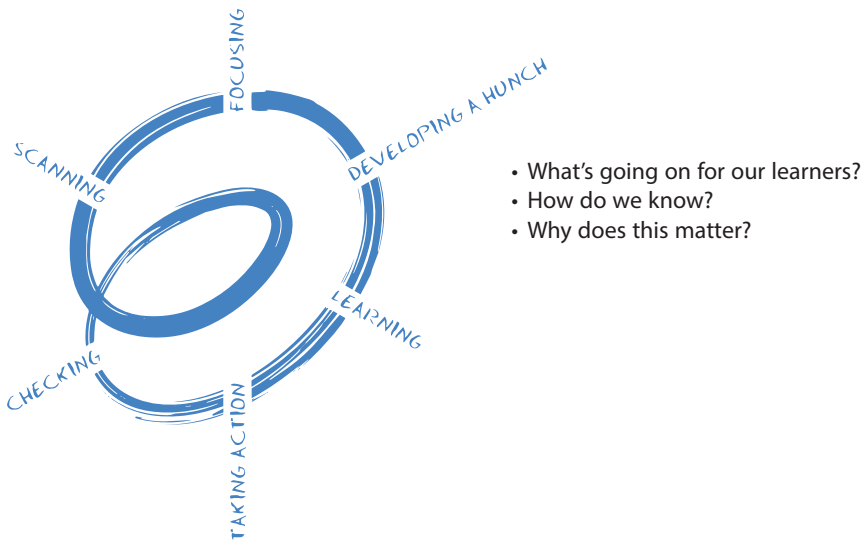
Educators across the world are bombarded with seemingly incompatible ideas about system direction and desirable models of reform. The call for disruptive innovation of education systems where schools, as we have known them, cease to exist has a certain appeal for those frustrated with the seeming snail's pace of system change. Others urge systems to focus intensely and consistently on improving the quality of teaching and learning with a few strong and carefully constructed goals. From this perspective, a focus on transformation and innovation is just one more system distraction. A third approach, usually advocated by politicians, is to make systems more accountable for learner performance guided by a belief that somehow someone will work out how to do this.

Although reformers may like to argue the relative merits of improvement, innovation and accountability, these distinctions are not particularly helpful for practitioners struggling to make learning more engaging and relevant in this moment in their particular context. The stance underlying the CIEL

programme is that new approaches to learning *are* necessary and new designs for learning *are* required. Educators in the CIEL programme engage in a disciplined approach to collaborative inquiry designed to assist them to gain the confidence, the insights and the mindsets required to design new and powerful learning environments – indeed to transform their schools and their systems.

The spiral of inquiry is the result of collaboration with Professor Helen Timperely from the University of Auckland and evolved from inquiry work in British Columbia and New Zealand. Central to the spiral is the attention at every phase to the experience of the learners framed by three key questions: "What's going on for our learners?" "How do we know?" and "Why does this matter?" Our recent publication – *Spirals of Inquiry: For Quality and Equity* (Halbert and Kaser, 2013) – includes a full description of this approach, illustrated with examples from BC schools. What distinguishes the inquiry spiral from other forms of action research is the relentless focus on the experiences of the learners to frame and inform the process.

Figure 5.3. **The spiral of inquiry**



Source: Halbert, J. and L. Kaser (2013).

The process begins by scanning the learning environment to gain a deeper understanding of the experience of the learners. The scanning process goes far beyond a simple look at available achievement data or results from

satisfaction surveys. Scanning also involves asking questions related to the seven key learning principles, for example:

- Do learners see and understand themselves as learners? Are they self-regulated? Are they becoming increasingly meta-cognitive?
- Do learners see and understand the connections across content areas?
- Are learning professionals tuned into the emotions of learners – and the connection between emotions and motivation?
- Do learners receive high-quality focused feedback that provides clear directions for improvement?
- Are learners confident and comfortable in both giving and receiving feedback with their peers based on co-constructed criteria?
- Are all learners stretched through demanding, engaging and challenging work?
- Are learners engaged in high-quality, well-organised co-operative learning on a regular basis?
- Is the prior knowledge that learners bring to the setting respected and valued?
- Are learners at the centre of every decision made in the school?

Scanning typically raises lots of issues, but there is a limit to how many initiatives any one setting can take on simultaneously. So, inquiry teams now sharpen the focus on an area for change that has high leverage while at the same time being manageable. The next phase involves developing hunches about the ways in which the learning professionals themselves are contributing to this situation. This "hunching" stage leads to discussion about what needs to be learned and how that learning will occur. Changing practice involves new learning and designing new adult learning is the critical next step. New learning leads to new actions and the final phase involves checking to determine how much of a difference has been made.

Engaging in a spiral of inquiry throughout the CIEL programme provides participants with the experience of leading change in their own settings. Working as a collaborative team with the other members of their cohort builds confidence and allows them to learn quickly from each other's experiences. The findings from OECD/ILE report on *The Nature of Learning* provide a strong conceptual basis to inform and shape the design of new learning experiences in their settings. And, exploring and applying ideas from the international case studies in the *Innovative Learning Environments* initiative, opens up new possibilities and connections on many levels. The CIEL programme provides a third space for learning – and change – to take hold.

Developing and nurturing leadership for learning in New York City
(Roser Salavert)

In an effort to improve the education of all its students, the New York City Public Schools system has adopted a learning-centred vision, and empowered school principals with greater latitude and discretion regarding organisational, management and instructional decisions. This reorganisation started a decade ago in 2002/03, the school year when the author was appointed superintendent of schools for District 3, a post held to 2010. The New York City Public School system is the largest in the United States and serves over 1.1 million students. The schools are organised into 32 districts, each led by a schools superintendent. District 3 in the West Side and Harlem section of Manhattan includes 35 schools and serves approximately 14 000 students. This text reflects on my experience as a change agent and direct observer of transformation, especially on key strategies that support, nurture and develop the leadership of teachers and administrators that enabled this to take place.

Strategy 1: collaboration and innovation through professional learning communities

Until 2002, school principals were instructional leaders responsible for the implementation of the curriculum and other initiatives driven by the school superintendent's office. As principals gained greater autonomy and acquired additional responsibilities they became learning leaders in a truer sense. The new structures, based on principles similar to those described by Dimmock et al. in Chapter 4, transformed the role of the principals, which in turn impacted on the entire school system.

One major organisational breakthrough was the requirement that principals had to join a network of their choice. The networks follow the principles of a professional learning community (PLC) (DeFour and Eaker, 1998); they have made possible the development of a common language around learning, and have fostered ongoing collaboration and exchange of best practices among schools from the city's markedly diverse economic, linguistic and cultural communities.

Networks operate at a "meso" level; the network leader and his/her team function as consultants and advisors and provide school organisation and management support to content area instruction and job-embedded professional development. This has enabled a seamless connection between cutting-edge research and best practices, always with a clear focus on developing and nurturing the leadership of principals, teachers and students to sustain learning environments. Members of the New York City Department of Education lead some networks, but the structure also includes a group of private sector networks called Partnership Support Organizations (PSO). Unusually in

Fordham PSO (to which this author contributes), the university extends its academic expertise and programmes to the schools in the network including opportunities for postgraduate and doctoral degrees.

Strategy 2: coaching to develop distributive leadership

Leadership coaching is a feature of today's most accomplished organisations (Whitmore, 2009). It is becoming a key tool for principals who face complex decisions and ever-increasing responsibilities. Research on educational reform has provided the field with tremendous resources and well-documented, research-based practices, but there is a general disconnect between theory and practice, between what researchers say works and how principals and schools apply it (Berliner, 2008; Istance, Benavides and Dumont, 2008). At times, and with the latitude provided by their autonomy, schools may interpret the research so as to accommodate or justify well-established practices; at other times, schools with the best intentions may apply research practices and recommendations too literally, resulting in understandable frustration.

Take the case of an inner-city school in Harlem I observed in which coaching helped to bridge this gap. The principal had taken over the school previously managed by a top-down administrator. The principal had attended several sessions on distributive leadership and was well read on the subject, but she was discouraged by a lack of progress when attempting to translate this new knowledge into an effective school-wide practice. The complexity of the organisation and a traditional school culture that placed the highest premium on the implementation of the curriculum presented real and difficult challenges. In partnership with the coach, the principal guided her staff in the development of a shared vision, established the conditions for a rigorous and collaborative culture, and effectively implemented distributive leadership. This continues to help the school improve their practice and has increased student achievement.

Strategy 3: facilitating inquiry through collaborative teacher teams

Whereas networks operate at the "meso" level, school principals should be encouraged to facilitate the collaboration among teachers within their own school. The purpose of some of my work at this micro level was to foster the understanding of the interrelationships between professional growth and students' achievement, particularly the academic success of students new to the country with no English language skills and limited or no formal education in their native language. Based on my background in data analysis, and to foster cross-fertilisation of experiences, I provided support to one of the networks with schools that were not under my direct supervision as schools superintendent.

The Collaborative Teacher Team inquiry model that is implemented in the New York City public schools is an adaptation of the Scaffolded Apprenticeship Model (SAM) of School Improvement through Leadership Development (Talbert and Scharff, 2008). The theory of change behind this model postulates that to extend the sphere of student success in a complex organisation, one must "stay small". That is, teacher teams work systematically and creatively to improve the outcomes of a targeted group of students. These teachers learn to analyse and triangulate data from different sources as they look closely at instructional practices and their alignment to the needs of the target students. Together, they drive the implementation of strategies that can work for their particular students and evaluate their impact towards achieving ambitious end-of-year learning goals. The outcomes of these teams then inform the teaching and/or organisational practices of the school thus creating the conditions for an innovating learning environment, and a school culture that promotes evidence-based student achievement. This process is best illustrated by the example below (Figures 5.4 and 5.5).

Figure 5.4. **Instructional inquiry cycle**

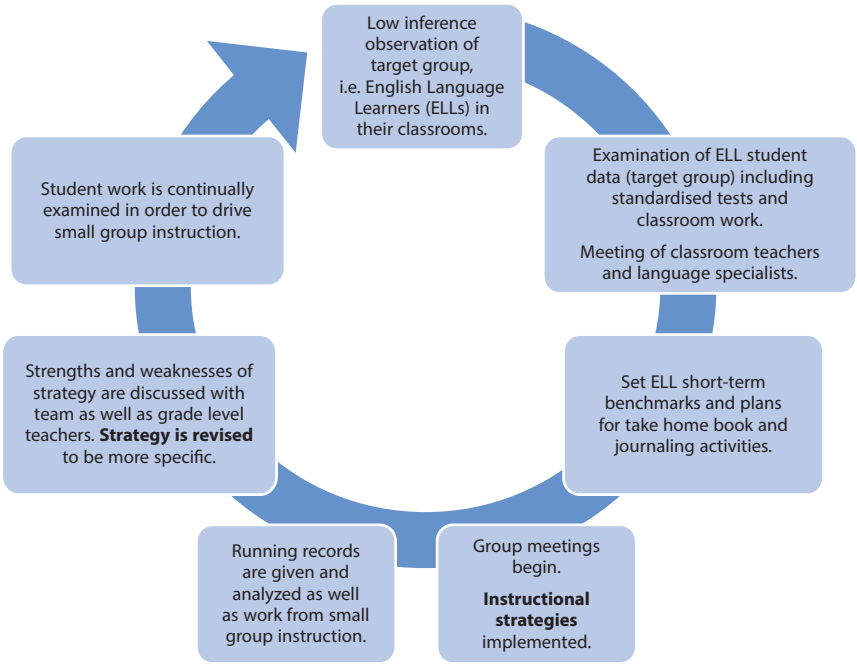
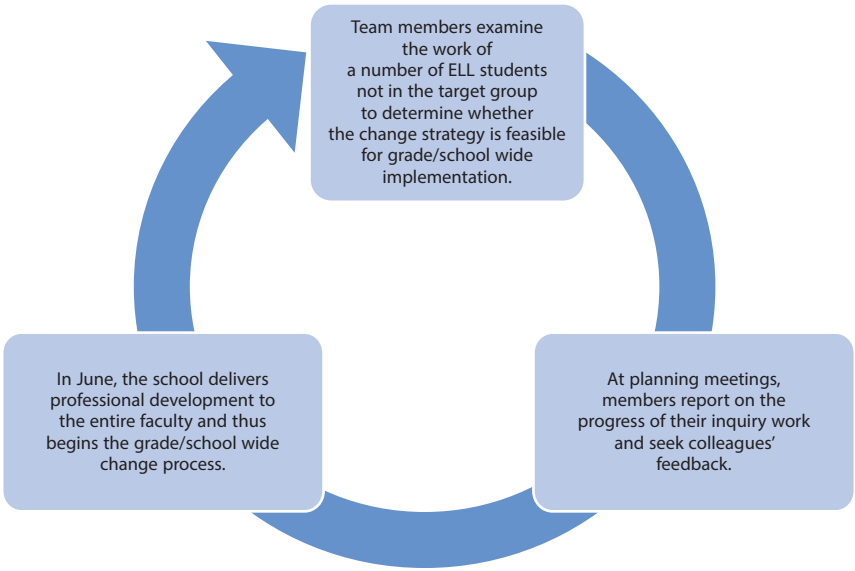


Figure 5.5. **School-wide inquiry cycle**



In one of the schools located in the Bronx, the principal showed some hesitation towards this small-target approach because the number of students who were under-performing was significantly high. With some trepidation, the school formed a Collaborative Inquiry Team. As teachers began documenting their observations and the progress of the target students, the principal noticed a change in the teachers' attitudes and an improvement in their practice. By the end of the year, most target students reached their academic goals. In addition, the team had identified and documented the specific strategies that had led to the desired student outcomes. The principal not only congratulated the work and accomplishments of the team, but also encouraged these teachers to share their results with the entire faculty. As a result, some of the strategies researched and implemented by the Collaborative Inquiry Team are now practices that have been implemented throughout the school.

This example shows the power of the SAM model by "staying small". An important key to substantial change is the ability to understand the interrelationships that influence behaviour over time and their impact on student learning. In the example presented, one of these critical interrelationships, and one that influenced student achievement, was the degree of collaboration among teachers. The success of the collaboration among the teachers in the Inquiry Team inspired the principal to reorganise teachers' planning time and support the learning research of the entire faculty, which resulted in the establishment of 14 Collaborative Inquiry Teams.

Strategy 4: listening to students and giving them a voice in their learning

A school that focuses on learning seeks the involvement of all its constituencies, including its students (Leithwood et al., 2004). This involvement is fundamental to developing their independence as learners, which is also the purpose of the academic competences (NYSED, 2011).

The impact of students in a formal role should not be underestimated, and a goal that I have pursued as leadership coach or superintendent has been to guide principals in the establishment of academic advisories, as well as student councils, or other forms of student governance. When principals seek the active participation of students as a strategy towards improving learning, they foster students' responsibility for their own learning while demonstrating their ability to enable sustainable and innovative learning environments. For example, in a K-8 (kindergarten to grade 8) school, the principal had adopted writing as an important part of a school-wide change strategy, and invited the Student Council to organise monthly publishing celebrations. The students would post the activities for the day and visit classrooms to facilitate the readings of compositions, including to introduce the writing process to their classmates. The efficacy of the Student Council reached a turning point when the students decided to interview classmates and teachers about writing genres to create a video, the success of which was marked when the faculty suggested that the video be uploaded and shared with the community via the school's website.

Collaboration and action: a broader shared vision

The strategies described above illustrate some of the benefits of bridging educational research and practice, and underscore its importance in educational reform. My experience also suggests that a school community needs to establish first and foremost a climate of trust and respect among its constituencies. This environment enables leadership for learning. That is, it makes possible the conditions for a collaborative culture that encourages teachers to continuously reflect upon their practices to improve and sustain student achievement.

Developing learning leadership in Norway (Lone Lønne Christiansen and Per Tronsmo)

The Norwegian PISA shock

When the first Programme for International Student Assessment (PISA) findings were published in 2001, our poor results surprised most people in Norway. We have always had big ambitions. We have had many initiatives,

reforms and plans, a great degree of political agreement and will, deeply committed teachers and school administrators, and also more resources than most countries. But there was a big gap between the ambitions, on the one hand, and actual practices in the schools, on the other. The challenge was one of implementation and change.

In 2006 the government passed a major school reform ("The Knowledge Promotion Reform"), with new curricula and increased local responsibility for primary education. In addition to the students' increased learning outcomes, the reform states in the basic principles for education that the school and apprenticeship-training enterprise shall be learning organisations that make it possible for teachers to learn from each other through co-operation on planning, implementing and assessing their teaching.

The responsibility for the implementation of the reform was given to the Directorate for Education and Training, a subordinate agency of the Ministry of Education and Research. Two of the most important initiatives were a national programme for school leadership and the Advisory Team programme, which are discussed below.

The importance of leadership

Traditionally, the public sector has used legislation and budgetary instruments to drive change, often with very modest effect. In Norway we now emphasise more empowering strategies, partly because they are more effective, partly because they suit the Scandinavian model better. Empowering is about giving people new authority and responsibilities, and helping them to be more powerful by giving help and support. It is about introducing recognition, feedback and reward systems that inspire, promote optimism and build self-confidence, including the non-punitive use of data. It is about encouraging risk-taking and non-traditional ideas and activities.

A key factor in this strategy is leadership, at all levels. In all kinds of organisations there is a strong need for leadership to focus on the core business. In a school the core business is learning. There are different expressions for this focus: "learning-centred leadership", "leadership for learning", "leadership of learning organisations", "leadership of learning processes", "instructional leadership", "leading to learn" and, as here, "learning leadership". In many countries, there is a perception that there is too much focus on administration and too little focus on processes for student learning. (OECD, 2008) An expanded role which combines administration with instructional leadership focuses strongly on the principal's management of teachers and their teaching.

Leadership can have an enormous influence on learning environments and outcomes. The Norwegian school system is highly decentralised, which calls for responsible leaders who are powerful, loyal, competent

and courageous; they need to have the "right" role, with enough focus on learning leadership and with legitimacy from the teachers. In most sectors the importance of leadership is obvious, but in the education sector this has not always been the case. A great deal of resistance to leadership can be found among teachers, and schools have little tradition for the leader to directly influence the work done by the teacher. But things are changing, and many good initiatives have been taken during the last ten years to improve leadership in the education sector (OECD, 2008).

Leadership will probably be even more important in the future. School autonomy and local freedom demand more from leaders. Leading change processes will be more common and more challenging. Important societal changes will influence schools, such as migration and mobility, the digital world, a more diverse society, individualisation, boys' under-achievement, smaller households, budgetary challenges, growing income inequality, increasing pressure from social expenditure (OECD, 2010, 2013b).

A school principal equipped to meet these challenges is one who is secure in the leadership role, having courage and strength to lead and manage, and the personal and professional strength to stand up and take on leadership and the identity of a leader. Leadership means taking responsibility for achieving good results. A leader is also responsible for those results being achieved in a good way, that colleagues enjoy a good working environment, and that these might continue to produce good results in the future. A school leader therefore has a social responsibility in addition to taking care of the day-to-day leadership and management of the individual school. By definition, a leader is responsible for everything that happens within his or her own unit, and in this sense the leader also has an employer's role.

Obviously, having responsibility does not mean that leaders must do everything themselves. Leadership is primarily exercised through others. A leader delegates tasks and authority, but the responsibility itself cannot be delegated. This does not mean that colleagues have no responsibility but a leader is never relieved of his or her responsibilities. Leadership is exercised by many, not just by those who occupy formal leadership or management positions. In this respect, leadership is a function to be attended to, or a set of leadership tasks to be performed. At the same time, the organisation is made up of people, with their own roles, relationships and abilities. Formal responsibility for results is linked to specific persons in formal positions.

Leadership, management and knowledge organisations

The OECD's Teaching and Learning International Survey (TALIS: OECD, 2009) describes the role of school leaders and examines the support they give to their teachers. It found that a number of countries have a relatively weak

evaluation structure and do not benefit from school evaluations and teacher appraisal and feedback. The principal's role is summarised as two main management styles – instructional leadership and administrative leadership – in which Norway scores lower on instructional leadership than most of the other countries, and higher on administration than most of the other countries. The two styles are not mutually exclusive, even though they are sometimes portrayed as such in the research literature. We want stronger focus on student learning, but at the same time we know that effective leadership also involves administrative accountability and a workable bureaucracy.

It has been fashionable to distinguish leaders from managers. Mintzberg (2009: 9) rejects the facile distinction: "By putting leadership on a pedestal separated from management, we turn a social process into a personal one … I want to put managing ahead, seeing it together with leadership as naturally embedded in what can be called *communityship"*. He sees management as neither a science nor a profession; it is a practice, learned primarily through experience and rooted in context. Leadership practice has to be learned on the job, through apprenticeship, mentorship and direct experience. A challenge for leadership education, training and development, in Mintzberg's view, is that too often it is individualised and participant-focused rather than rooted in the organisation and workplace (Mintzberg, 2011).

There is a large body of research and literature about so-called "knowledge organisations" (hospitals, universities, law offices, consulting firms, schools, etc.) and their leadership challenges. Three main such challenges are: *1)* tension between professionals and leaders; *2)* too much focus on steering and control; and *3)* problems of legitimacy for the leaders. A school is a knowledge organisation with strict professional requirements and strong focus on professional questions at all levels. The ability to lead learning processes is crucial in order to be both a good leader and sufficiently skilled academically to make one's own professional assessments and make the best use of internal and external human resources. Leading knowledge organisations is often more difficult than leading other organisations, because those working in them tend to be independent, vigorous, competent and, first and foremost, professionally oriented.

Leadership challenges and development in Norway

According to Geert Hofstede (2001), there is a distinctive leadership profile of Scandinavian countries which combines very short "power distance" and a very "feminine culture". A study from Norway (Grenness, 2006) confirms this distinctiveness in more detail, characterising Scandinavian leadership as having high ethical standards; proximity to employees, team orientation, and preference for good working relations; striving for consensus; high gender equality; strong focus on process; conflict avoidance; low

results-orientation; slow decision making; fuzzy control mechanisms; and lack of "warrior" attitudes. It could be said that the Scandinavian leadership style is particularly suited for a post-industrial knowledge economy where success is dependent on collaboration across the value chain, networks and partnerships and the ability to innovate in an environment of high levels of ambiguity and change. There are of course both positive and negative aspects of this "Scandinavian leadership model".

The Norwegian school system is decentralised, with nearly 450 municipalities responsible for the schools. There are big differences between the quality of municipalities, between schools and between school leaders. But the problems confronted overall in Norway are:

- Insufficiently strong leadership, at all levels.
- Insufficient expertise and strength among school owners.
- Fragmentation in the school sector, meaning that there is insufficient focus on the sector as a system.
- Fragmented schools, so that there is insufficient focus on schools as organisations.

The national policy is to give leaders more support, help and professional training, and to support schools and municipalities in their organisational and systems development work. These are described in the next two sections, with particular emphasis on the latter.

Leadership development in Norway

The national framework describes the requirements and expectations that can reasonably be set for a school principal, and forms the basis for the national programme for leadership training and development for principals in Norway (Norwegian Directorate for Education and Training, 2008). It involves the following main areas:

1. the pupils' learning outcomes and learning environment
2. management and administration
3. collaboration and organisation development; the guidance of teachers
4. development and change.

The most important of these four areas is the first one, which is associated with learning leadership. The principal is responsible for the pupils' learning outcomes and learning environment, and the principal's ability to lead the learning process and guide teachers in this is crucial. A school is a knowledge organisation with strict professional requirements. The principal must therefore

have sufficient academic competence and legitimacy to make good professional assessments and make the best use of internal and external human resources.

There is another area of leadership development which is of another kind as it has to do with the personal side of leadership – the leadership role. This is about developing leaders who are clear about their own role as leader, able to define and redefine, and if necessary negotiate and renegotiate, their leadership role and their conditions for exercising good leadership.

The national management training programme for principals, which was established in 2008, is for all newly employed head teachers in primary and secondary education. It has been set up to be an answer to the challenges of the school system, with a strong emphasis on being well managed and goal oriented and based in a practical way on the experienced needs of school managers and others.

The leadership training programme has been evaluated by highly-respected research institutions. To now they have finished two out of four reports and concluded in very positive terms (Hybertsen et al., 2012a, 2012b). There are also other indications that the programme is leading to good results. One is its popularity, with an increasing number of applicants every year. Another is the positive evaluation made by the providers. There seems to be a shift in attitudes with leadership and leaders increasingly recognised as important for school improvement, including attitudes expressed by different stakeholders (unions, politicians, school owners, universities, etc.). Added to this, there are signs of improvement in student performance.

The Advisory Team programme

In Norway, most schools are public, with a large number of small municipalities, and school management and leadership development is a local responsibility. School owners often lack the competence and capacity to meet the challenges involved and hence the government started the Advisory Team programme. It is aimed to help school owners and school leaders who are facing special challenges in core areas for quality, such as students lacking reading and mathematics skills, learning environments that do not promote learning, and students and apprentices who do not complete upper secondary education or do not pass their exams in upper secondary education and training. The aim is to enable school owners and schools to implement national goals through local development strategies by strengthening the school as an organisation, using proven tools and methods.

The programme is led by the Directorate of Education and Training, and the main national partners are the Norwegian Association of Local and Regional Authorities (KS), county governors (the national education offices at county level), the university/college sector, consulting groups, and practitioners.

The school development work itself takes place locally. The political and administrative school owner is involved, principals participate, and other local support groups are also involved, depending on the guidance topic in question.

The Advisory Team was piloted in two counties in 2009-10, and the first regular portfolio of the Advisory Team was started 2011. During the next 3 years, the Advisory Team's activities will cover 18 counties and 429 municipalities, the whole country except for Oslo. About 30 municipalities have 80-100 schools in each portfolio, receiving guidance for 18 months. By the end of 2013, all municipalities in the country will have been offered guidance from the Advisory Team for the first time.

There has been a research-based evaluation of the system of the Advisory Team. The first interim report (Norwegian Directorate for Education and Training, 2013) is a study covering the feedback of advisors and those who have received guidance and the next report will be available in December 2013, containing an evaluation of the results and impacts.

The advisors in the Advisory Team are recruited from among school managers and municipal educational administrations from all over the country. The team of advisors is national and governmental, but has no formal authority and so it is up to the municipality whether it will accept this support. The advisors are grouped in smaller teams responsible for two or three municipalities and their schools. The teams work with the schools and their owners on an individual basis during the process. School owners are gathered at the beginning and the end of the guidance process for joint competence development and sharing of experiences and planning. The aim is to enable the schools and their owners to continue their quality development work on their own. Development work is a continuous process, comprising identification of needs, option evaluation leading to solutions, the implementation of these measures and evaluating them. The guidance takes the form of a coach/mentor relationship, and focuses on the first phases of the municipalities' quality development that can be achieved in 18 months.

The phases that the Advisory Team takes part in are:

- *Identify developmental needs*: the advisors actively deploy analytical tools so that the school identifies areas for development and at the same time the advisors identify the school's counselling needs.
- *Planning the development project*: the guidance is given according to revealed needs, and complementary external assessments of the school's potential and developmental needs are also offered.
- *Implementation*: the guidance is based on local need and on knowledge of learning organisations and change management, backed up by meetings and seminars.

The tools used are for mapping, reflecting and analysing the current situation – the Quality Status tool and the Organisational Analysis tool[3] – together with an external assessment methodology for starting and anchoring development work at the school level.

The guidance is supportive, aimed to help schools and their owners start their local development work. The Advisory Team gives no guarantees, but can contribute to schools' and their owners' successful development work. A prerequisite for success is the active and responsible participation from all parties. Acceptance of the offer of guidance is an indication of the will for development, a basic prerequisite for change. The guidance considers the school and its owner as an overall organisation, and considers how it works and how it can be improved. The advisors contribute with knowledge, experience and counselling (Schein, 1998), enabling the school to better meet the challenges coming to the surface during implementation and pedagogical changes. Some schools may additionally need competence development related to basic skills, evaluation or other core tasks. The Advisory Team can contribute to finding the relevant competence groups, but does not offer guidance on these fields and the Advisory Team itself never assumes responsibility for the development processes.

Guidance, practised as national support for local development work through the Advisory Team, is a tool that the Directorate of Education and Training and the public authorities in Norway have had no tradition in using hitherto. Since Norway traditionally has had little control, access to and evaluation of schools, the Advisory Team was seen as controversial, and efforts were made to reduce the risk of resistance in the education sector.

This resistance was handled through a deliberate emphasis on its voluntary nature (Schein, 2009), and emphasising that school owners seeking counselling were not "losers", but instead were showing courage and flexibility. The university and college sector and the public administration also resisted the measure. For the public administration, the resistance was to the state interfering in a local authority, while higher education resisted the Advisory Team as a professional competitor. This resistance has now turned to support, based on good results in terms of satisfied school owners and advisors. Both the public administration and the higher education sector have been involved in the Advisory Team in such a way that the activity has become professionally and organisationally anchored and in both sectors a change of attitude has taken place.

The result to date is of satisfied school owners having received counselling, as well as the advisors being satisfied in seeing the guided municipalities making progress and earning important experience and development competence in their own municipalities and schools (Norwegian Directorate for Education and Training, 2013). The Advisory Team has been an effective foundation for

disseminating the Directorate of Education and Training's web-based quality development tools and the external school evaluation methodology. These tools seem to be very useful, especially for the schools and school owners that have no previous experience or confidence with quality evaluation.

An important success factor has been the centralised, tight management of the programme, and the strategy was thoroughly worked through and was familiar to the different actors and stakeholders. The Directorate has defined the competency requirements for the advisors, carefully selected them, established an obligatory training programme, and do not re-engage advisors who were not adequate. The focus for the Advisory Team is the school owner and the school as a unit, and there are strong conditions for the participating school owners in terms of active engagement. It is thus both a top-down and a bottom-up approach.

Learning leadership in South Australia (Susanne Owen)

Background and context

During 2011, seven South Australian Department for Education and Child Development (DECD) schools, preschools and early learning centres were accepted into the OECD Innovative Learning Environment (ILE) project, having met the criteria for significant innovation. An additional 8 sites have since been identified by the department as being significantly innovative; with all 15 now being recognised and operating within the state-wide Innovation Community of Practice and with others also joining the group as emerging contexts for innovation. These sites, which range from birth to year 12 levels of schooling and care, represent "grassroots" innovation, having developed innovative approaches over various timeframes to meet the needs of their children and students, and their different learning and community contexts.

While the innovations are highly specific, they are generally characterised by features that are consistent with the OECD Innovative Learning Environment project in relation to the key elements and dynamics related to teachers, learners, content, resources, and organisation and pedagogy. Innovative aspects include learners being within multi-age groupings (such as reception to year 7 "Magpie" groupings and year 10-12 tutor groups) and content being about big picture or fertile questions which provide opportunities for interdisciplinary and deep learning experiences. Individual student learning plans are a key feature in all sites and there are sometimes purpose-built facilities or traditional physical spaces that have been renovated and transformed into "campfires" for targeted master classes and specialist skill building, or "cave spaces" for quiet reflection. Professional learning teams meet regularly and typically engage in co-planning, co-teaching and co-assessing, while also considering data and other evidence about individual

student progress. A key characteristic of these innovative sites is the nurturing of leadership skills for all members of these professional learning teams, supported by the school/preschool leader through the provision of time and/or funding for professional learning.

These innovative schools and preschools operate with some degree of autonomy within a centralised public education system that is currently undergoing significant change to achieve the state government's vision of a fully integrated child development, education and child protection system. Currently (2013), the department is being restructured across its birth to year 12 education and care contexts, with the incorporation of some former Health and also Families and Communities services. The redesign strategy – *Brighter Futures* (DECD, 2013) – is focusing on changing culture, service delivery practices, processes, roles and systems to ensure higher achievement standards, improved health and well-being outcomes, better family-carer support, stronger community-led engagement in determining local provisions, and greater emphasis on student voice in shaping policies and practices. The principles guiding this work include "creating sustainable growth and continuous improvement", and "building a culture characterised by positivity, finding solutions, creativity and innovation". Establishing networks of preschools and schools with a focus on local community is highlighted as a key feature of the state-wide *Brighter Futures* initiative.

Networks and communities of practice and professional learning communities are therefore a significant aspect of the department's future direction. Individual innovation sites are already strongly committed to using teacher professional learning communities focused on a particular group of students or involving action research. Planning, teaching and assessing in teams is an ongoing professional learning approach to support teachers in changing their role to that of being learning facilitators, teacher "engagers" and co-learners with students.

Leadership approach

In examining professional learning at an individual site level, it is apparent that teacher learning in the most innovative DECD schools reflects the professional learning community characteristics generally identified in the literature (Haar, 2003; Vescio, Ross and Adams, 2008; Darling-Hammond and Richardson, 2009; Scott, Clarkson and McDonough, 2011). Indeed, in South Australian case study research conducted recently on innovation and professional learning communities, the key themes identified were: shared values and vision, on-going collaboration, commitment to joint practical activities and student learning outcomes, supportive and shared leadership, and teacher inquiry and learning together (Owen, 2012). Collegial and on-going professional learning to build respect and trust and to share the

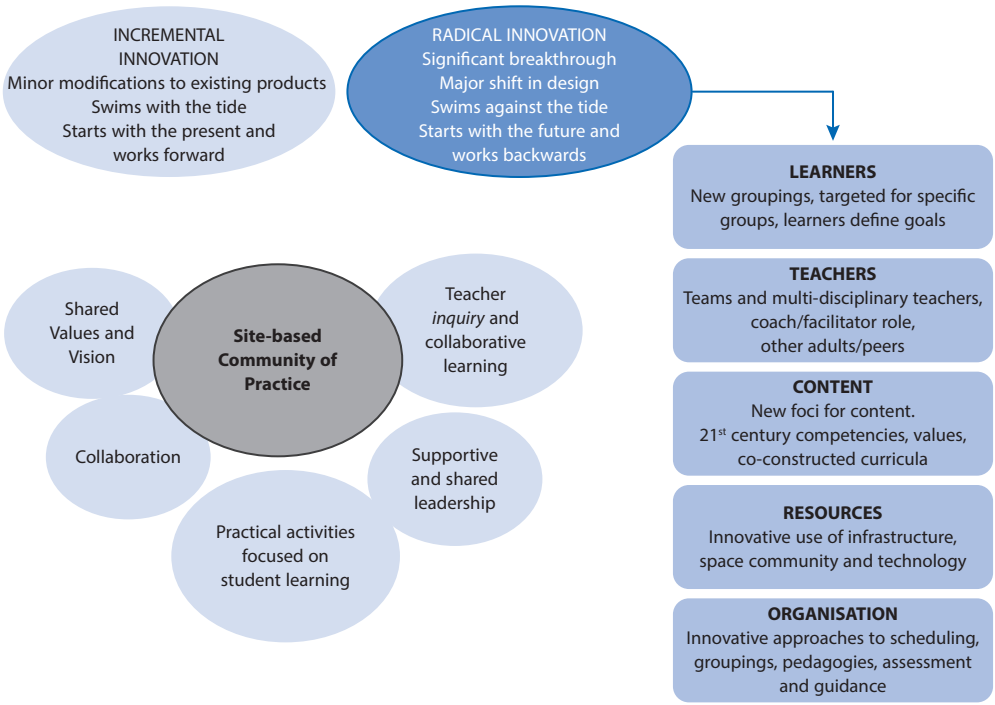
vision and language are also viewed as a critical aspect of this process, as indicated in one representative leader comment:

> We're talking about whole school innovation, change, focused on improvement. You can't do that unless you've got people who are speaking the same language, sharing the same vision … they're trusting and respecting of each other, constantly looking at ways of changing … You can't do that by yourself. It's incredibly isolating, threatening … [It involves] structuring the whole approach to the professional learning, to the professional learning community as a baseline (Owen, 2012: Leader Interview 1).

The leadership and communities of practice diagrammatic model for innovation which has been used within some of the DECD leading innovation workshops and which captures this approach is set out in Figure 5.6.

In the South Australian innovative sites case study research (Owen, 2012), professional learning team members and principals both emphasised the importance of contributive leadership which is about true "grassroots"

Figure 5.6. **DECD educational innovation**



valuing of staff ideas in driving change agendas. This is reflected in the following school documentation:

> There is a strong ownership as a staff for the curriculum and pedagogical practices. … This ownership is due to the staff creating them as a team and continuing to develop them. … We have collectively developed a culture of change, high expectations and commitment to the school's philosoph … Shared leadership reinforces the ownership that staff have for the success of the school in achieving improved outcomes for student … Having all staff leading gives an appreciation for the role, which has increased the sense of trust in one another, so initiatives can progress more efficiently and with great support (OECD, 2012; School B, supplementary information: 8).

The school leader's role in supporting professional learning teams cannot be overestimated. Teachers working together in teams, focusing on particular student groups and sharing leadership and responsibility for the learning of others, need to be supported by leaders who not only provide time and funding for professional learning to occur, but who support the establishment of teams as "deliberate structures where people can challenge each other about the level at which they do that work" (Owen, 2012: Leader Interview 3). Many examples of this type of supportive leadership are provided by participants within the South Australian innovation case study research.

Leading innovation through a community of practice

Beyond innovation in individual schools and preschools and the professional learning communities being nurtured and operating within them, the work of the innovative schools across the South Australian public education system has been supported through a small team operating in the department's central office. The focus of this co-ordinated work has been to "build the momentum" for innovation more widely across schools and preschools. Various strategies are involved, including conferences and workshops, an innovations website, part-time advisory support from an innovation principal, practitioner research grants with academic support, and innovation newsletters.

Much of the co-ordinated systems work operates through the DECD Innovation Community of Practice (CoP) which has involved about 30 people from across the 15 identified innovation sites (but which has been expanding during 2013 as more sites were included). Participants regularly attend face-to-face meetings which are held once each term to share practices, information and ideas; discuss emerging issues or opportunities; and collaborate in planning future work or events. They also provide advice and recommend policy directions in relation to innovation for wider dissemination and possible system uptake. Due to distance factors, participation is also facilitated through

emails and other communications. Meetings are rotated among innovation sites, with all having the opportunity to host a visit where a tour is provided and members are updated about the site's innovation philosophy. During 2011-12, the CoP collaborated to facilitate a series of one-day state-wide innovation events for other schools with up to 400 people attending some of them. The sites also undertook practitioner research about aspects of their innovative work, with academic support and collaboratively developed and contributed research reports and other materials to the project website (www.innovations.sa.edu.au) and to innovation newsletters.

The community of practice and wider activities of conferences, newsletters, and websites closely reflects the "nested communities of practice, engagement and interest" model of diffusion outlined in the Global Education Leaders' Program (GELP) publication, *Redesigning Education* (2013). In this approach, the early adopters work together in a "structured, supported and facilitated" community of practice, "share research and knowledge, work together to use disciplined innovation methods, draw on the expertise of relevant partners", and "learn from each other about overcoming obstacles and barriers". The nested communities of practice model is clearly evident in the DECD CoP, surrounded as it is by "communities of interest", that are populated by individuals and organisations interested in the case for change and wanting to be kept informed of developments with newsletters, websites, conferences and workshops all useful. Furthermore, as the GELP publication indicates, the "community of interest" are ready recipients to the work underway in the community of practice; the nested model being most efficient when the "the innovators have been authorised or legitimated to act on behalf of the system as a whole" (2013: 97-98).

A particular focus which began in mid-2013 is a specially-designed Exploring Innovation programme of visits to a number of the highly innovative schools. This programme has been planned by the CoP members, using their own practitioner action research findings to provide evidence of the impact of the innovations. The Exploring Innovation visits and the practitioner action research project are activities which have been co-ordinated by the department's innovation team (with the practitioner researchers also supported by a small grant and university academic mentors). In the "Exploring Innovation" visits, leaders and teachers from other schools and preschools are encouraged to visit in teams. The diffusion of innovative practices will be examined through tracking attendees at the visits and monitoring the uptake of innovative practices at their own sites, from the time of registering for the visit and then again at six-monthly intervals. This will enable data to be gathered and shared about their own perspectives and experiences, and about the progress of innovation in their individual contexts.

Further systems building of the innovation culture occurs through provision of a small funding grant for practitioner research to another 10-12 emerging innovation sites, including one newly operating network cluster. Grants are available to sites across the DECD public schooling system and for all levels of schooling and care. In a partnership arrangement with a university over a 12-month time frame, these emerging innovative sites are being supported through initial research training and support in developing their research proposal, access to an academic critical friend, or to purchase additional academic time for particular aspects of the research process. Presentations at various events and progress reports are required and there is the option of final report formats including longer reports, posters and power-point presentations, although certain basic research report features must be covered (background to research, research methods, findings, conclusion and references). These schools and preschools have also joined the existing innovation community of practice as active members.

A key issue which emerged through the Innovation Community of Practice review discussions, and confirmed by materials from the Center for Creative Leadership (CCL, 2009), is that leadership of innovation goes beyond the usual traditional approaches to thinking, strategic change and management that are focused on logic, deductive reasoning and right/wrong results. Leadership models need to be focused on leading for multiple perspectives, considering personal experiences to gain fresh perspectives, paying attention and perceiving deeply, being involved in serious play and generating insights through experimentation. Collaboration and embracing diverse viewpoints are key aspects.

Participants in the CoP have identified as key benefits of membership of the community to be working together beyond their own establishments, contributing to changing the nature of schooling at a systems level, learning from each other's large school/small school situations, and affirming work underway in their own contexts.

The state-wide Innovation Community of Practice is important in helping other leaders to gain the confidence to "have a go" and establish grassroots innovation appropriate to their context. The CoP is also seen as an acknowledgement that innovation has a place within the education system. As one CoP member indicated in a review discussion: "This group exists and we want to ensure it continues to exist… [we] want it to be leading edge". While many of the schools and preschools involved had previously established themselves at a grassroots level as significantly innovative, being part of a systems approach within a community of practice has benefits and the importance of connection to the innovation work of the OECD is acknowledged.

Another benefit of the DECD Innovation Community of Practice operating at the state-wide level is that individual innovation leaders can be legitimately involved in "rule bending" or experimenting with disciplined innovation within their local schools and preschools. In a larger programme of system restructure and redesign, these innovative schools are able to provide evidence about the impacts on student learning and well-being of innovative approaches they have been trialling, thereby supporting the whole system to move forward.

Given the current South Australian context, and considering the DECD *Brighter Futures* directions with its focus on creating sustainable growth and continuous improvement while building a positive culture characterised by finding solutions, creativity and innovation, there is certainly a role for the Innovation Community of Practice to influence the various projects that are being established as part of the department's overall redesign. There is a need to ensure that innovation is captured somewhere, particularly as old structures and processes are replaced and new networks, relationships and connections are created. Through an on-going and expanded Innovation Community of Practice, individual site leaders and their communities are able to use their experience and influence to work collaboratively to shape those future directions and ensure that the new department has innovation as a predominant aspect of its work.

Learning leadership for innovation at the system level: Israel
(Dorit Tubin)

Conditions for successful learning leadership at the system level

Learning leadership can usefully be understood as the ability to influence others to accomplish common goals of improving the learning environment(s) within and beyond the classroom. This definition contains four elements that represent the conditions for learning leadership to flourish at scale: *1)* social position; *2)* the ability to choose a common goal and develop a vision; *3)* the capacity to influence others and create a structure; and *4)* the ability to evaluate and provide feedback.

Social position

Leading a large-scale innovative learning reform means occupying a high prestige position in a prominent social organisation. Social position may be based on formal authority (ministry of education), expertise (university), economic and social capital (private and non-profit organisations), or a combination of these.

Ministries of education thus have the necessary social position to understand values and structures and to influence change. Public education systems as bureaucracies, however, tend to have only few directors at the top and even fewer innovators. Thus, it is usually one person, sometimes together with a small leading team, who initiates and leads such reform. A high-ranking position provides the leader with the necessary understanding of the system's values and structure, and brings the power to be able to seize opportunities for innovations, and even the ability to change regulations, allocate resources, and implement the innovative learning reform.

The ability to choose a common goal and develop a vision

A common goal is necessary to justify innovative learning reform as part of the education system's broad social agenda and goals, whether this is promoting 21st century learning skills or reducing the inequality gap or fulfilling every child's potential. The common goal must present the essence and main challenge to be addressed so that it can serve as a symbol for the change that will foster legitimacy and stakeholder support for the investment of the time, money and expertise required.

The common goal should be translated into an educational vision, to offer a "road map" from the unsatisfactory present situation of learning towards a more promising future. The vision should attract partners and followers, and provide them with the motivation, suggested methods, and narratives to explain the importance of such reform for innovative learning. The vision gives meaning to such concepts as "improving", "learning" and "environment" providing the necessary context and relevance that are understood by and attractive to potential partners. The vision informs benchmarks and suggests evaluation criteria for assessing implementation measures. Without such a vision, there may well be too many routes to implementation and too much empty rhetoric, even mistrust in future reforms.

The capacity to influence others and create structure

To influence others, leadership must possess the ability to use various channels of communication (e.g. face-to-face meetings, lectures, media and internet facilities) for reaching target audiences at the right time and place. Also important is the ability to operate different methods, such as inspiring vision, extra resources, prizes and reward systems, to motivate others to change in line with the educational vision.

For the wider diffusion of innovative learning environments, the leadership has to create a particular structure or blueprint for people, roles, tasks, resources, equipment, and information and communications technology (ICT) to support the reform's goals. The leadership has to offer resources and means

of obtaining the resources needed for realising such a structure in a way so that the same kind of innovative learning environment can be duplicated in different locations. It also has to establish co-operation and collaboration with a variety of stakeholders at various levels of the education system and outside it, delegate authority, and distribute leadership to create engagement across teams of professionals.

Evaluation and feedback

Sustainable innovative learning reform at scale needs to have a learning network embedded in its very structure, promoted by the learning leadership, and providing information about the learning taking place in the innovation venues among the participants system-wide. The circulation of information between the participants enables them to learn from each other, thus boosting success and reducing the repetition of failures.

The leadership should first ensure that the information is circulated in the system, and second verify that it is being used to refine the vision, establish benchmarks for evaluation, using the outcomes for accountability reports, and reconnecting performance to the goals of innovative learning. The evaluation outcomes should serve leaders at all levels (teachers, principals, high-ranking officials and stakeholders) for redesigning learning environments, providing positive feedback to the learners, and enhancing leadership abilities through self-awareness.

Self-awareness includes the ability of those in different leadership positions to understand their values, motives and effectiveness in influencing others. It enables leaders to improve their capacity for inquiry, reflection and learning from experience. Thus, reforms to spread innovative learning environments are able to serve not only the end-users – students and teachers – but also the leaders themselves. For this to happen with diffusion among as many participants as possible, different methods are required such as a professional learning community, workshops, training, conferences and academic studies.

Concrete examples

The most notable example in Israel of leading and disseminating innovative learning is the Ministry of Education Experiments and Entrepreneurship Division. This began operating in 1996 with the aim of supporting changes and initiatives originating in the education field, and providing them with backing and support within the education system. The initiatives engage with a variety of aspects of enhancing education, including learning advancement, increasing motivation, developing alternative teaching and learning methods, and designing innovative learning environments. The target audiences are

learners and teachers in educational institutions from kindergarten to higher education. The central idea is to identify and develop innovative educational models adapted to the challenges of the present and the future, which will constitute inspiration for shaping Israel's education policy. In this way the Experiments and Entrepreneurship Division encourages the involvement of educators in shaping and enhancing education in Israel.

The Experiments and Entrepreneurship Division is part of the Ministry of Education. Its main partners are educational institutions throughout the Israeli education system, from kindergartens, through schools, to teacher-training centres and colleges. Any such institution interested in developing and applying an educational initiative designed to advance learning among its students is invited to approach the Division, and operate with its support during the initiative's first five years.

The Division's main activity is identifying educators with a vision that their place of work can be different, and enable them to develop it for the learners, the teachers, and the community. This is a five-year process in which the entrepreneurs are monitored during the implementation of their dreams, the suitability of the innovation for the institution is examined, and its assimilation into everyday educational processes is evaluated. The Division provides support, training, and research and development (R&D) tools for the initiatives and their assimilation while holding a continuous dialogue between the institution (in which the initiative is operated and applied), the division (which provides support and backing) and an academic adviser (who liaises between the initiative and the research in the chosen sphere).

In the course of the five-year period, the institution is required to apply the innovative initiative with ever-increasing scope within the school, with a Division supervisor and an academic adviser supporting it step by step. At the end of the five-year period, the school is required to write the experiment report in which it details the experiment theory, the process and its products. Schools demonstrating special success become dissemination centres in which their teachers teach teachers from other institutions interested in developing similar innovations. This is a process that advances and develops not only additional schools, but also the teachers who become instructors of the innovative initiative. To achieve this, the Division operates in five main spheres: it encourages R&D of innovative educational initiatives, examines proposals and requests for experiment, monitors the training and assimilation of innovation in educational institutions, encourages documentation and management of the knowledge accumulated in the course of the experiment, and disseminates the experiment's products throughout the education system.

Each year 15 new institutions join the Division, while fifteen others complete their 5-year experimental period and start functioning independently.

In any given year, 80 experimental schools are operating simultaneously under the aegis of the Division. This complex system has at its disposal the Division's director and secretaries, offices in the Ministry of Education complex, 40 annual training days whereby a number of supervisors work with the schools, and a half-time teaching post for each school joining the experiment. Additionally, the local authorities fund an academic adviser who works with the experimental institution, and they also provide the physical environment or dedicated equipment required for the experiment.

With time, the Division, together with the experimental schools, has developed in several directions. More and more schools have joined the experiment, and have streamlined the monitoring and evaluation of the experiments and initiatives. The Division has also expanded toward additional activities such as the advancement of special education schools, and community activities. Finally, both the Division's staff and its work processes are becoming increasingly specialised and professional.

The challenge for the Division is its institutionalisation, as it has always been original and innovative within the Ministry of Education and among educational institutions. Starting from a small number, in recent years the Division has reached some 150 schools.

In the field itself, the Division's success has depended on the school leadership. With few resources and a great deal of inspiration and motivation, the principals and their staff are leading their schools toward developing a more meaningful and varied learning environment. They are also writing and developing the experiment theory in experiment books, and they often establish dissemination centres, thus involving the whole community, not just themselves. Belonging to the Division is prestigious in itself and facilitates a support group that assists innovators to break out of their isolation and become a meaningful community that manages the risks of innovation in an informed way, and influences the Israeli education system.

There is much school interest in joining and developing educational initiatives, but budgetary constraints dictate the number that can be accepted each year. Success is not only to be judged in terms of adding schools, but also of improving and deepening successful initiatives. Leaving the Division after five years sometimes impacts on the experiments and sees them go backwards.

Looking at leadership at a still higher level in the system, it is important to recognise the role played the head of the Ministry of Education Experiments and Entrepreneurship Division (EEE). She managed to choose educational innovation and pedagogical experimentation as the principal goals for the future of the Israeli system, and elaborate it into a vision that sparked the imagination of stakeholders. Based on her previous experience as a successful

school principal, charismatic leadership style and ability to convince the decision makers, she established the Division in 1996. Her deep acquaintance with the formal regulations and her experience with administrative requirements allowed her to create an efficient network of people, resources and organisations that experience an innovative environment under the control, support and guidance of the EEE Division. Hence, she too embodies the four conditions necessary and sufficient for system-wide ILE reform.

The four conditions for learning leadership outlined at the beginning of this chapter section have several implications. First, they can be adjusted to different contexts and levels, thus enabling cross-cultural comparison. Second, they can inform decision makers about the conditions needed for building learning leadership capacity, and initiating successful learning innovation reform. Finally, they can serve as a diagnostic tool for finding what works well, and which lacunas exist in innovation reform already underway, so that the invested efforts and resources effectively improve the participants' learning. The main lesson seems to be that where the system is concerned (at district, municipality or country level), the heads of these systems should take on the role of learning leaders. They enjoy the privileged position to embark on such initiatives and to lead towards sustainable and successful large-scale innovative learning implementation.

Notes

1. Roser Salavert Ed.D., was formerly Schools Superintendent for the NYC Public Schools, and her views are her own based on this experience. She is also closely involved as an advisor in Catalonia, Spain, and a member of the ILE Project at the Jaume Bofill Foundation (see Chapter 6).
2. Principal Officer Strategic Research and Innovation: Leader, Innovative Learning Environment (ILE) project.
3. The Quality Status tool: www.udir.no/Upload/skoleutvikling/Stastedsanalysen/Om%20st%c3%a5stedsanalysen.pdf?epslanguage=no. The Organisational Analysis tool: www.udir.no/Utvikling/Verktoy-for-skoleutviklinganalyser/Organisasjonsanalysen/.

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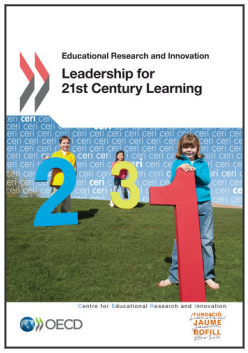

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