

The professionalisation of educational leadership: Implications of recent international policy research in leadership development for Australasian education systems¹

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This article uses international policy research published in 2007 and 2008 to clarify policy options for Australasian education systems regarding the preparation and succession of educational leaders.² The current educational leadership development policies in New Zealand and Australian states are briefly reviewed. Evidence is then presented from a wide range of education system studies sponsored by three major projects; the OECD's Improving Schools Leadership project, the International Study of Principal Preparation and the International Handbook on the Preparation and Development of School Leaders. It was found that the major concepts used to describe and justify leadership development internationally included national educational philosophies, cultural leadership, school effectiveness and improvement, socially-critical political philosophy, and personal learning in a planned career path. It was found that Australasian education systems would be well advised to address emergent crises in the quality and quantity of supply by developing integrated educational leadership development policies and programmes with particular features: active learning, skills training and higher education connected to practice; a career-related learning framework; effective role transitions; summative and formative evaluation; a validated indigenous knowledge base in a multi-cultural context; and, a research and development role for universities. Four key strategies are recommended: (a) redefine school leadership responsibilities to untangle ambiguities of governance and recentralisation, deepen the research base of leadership practice and advance deep learning about the dilemmas of practice; (b) distribute school leadership to help resolve endemic role overload and role conflict over accountabilities; (c) develop a national framework for leadership learning to reconcile careers, institutional needs, demands for system leadership and terms and conditions of service; and (d) make school leadership an attractive profession through the professionalisation of recruitment, salaries, national associations and career development.

Introduction

Preparatory or pre-service strategies are defined as groups of methods that are used to assure aspirants' role-specific capacities prior to their appointment. Succession and in-service strategies are defined as groups of methods that are intended to sustain successful leadership service and ongoing learning about leadership after appointment. There are three reasons for adopting these definitions, in addition to using the term 'leadership development' generically "to indicate both pre-appointment preparation and post-appointment on-going development of leaders" (Lumby & Foskett, 2008, p. 44).

First, distinguishing between pre-service and in-service strategies highlights the importance of systemic leadership development strategies that guarantee that leaders will have basic competence on appointment. Minimal levels of role-specific competency are very important to stakeholders at team, executive, institutional and system leadership levels in education, to children and teachers in particular, and essential to the positional authority of the appointee and the legitimacy of the

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selection process and the host system. Appointing people to positions of responsibility who lack basic competencies may corrupt an organisation.

Second, this approach also puts the spotlight on the contribution being made by in-service education and training. Enabling incumbents to serve successfully over years, by systematically advancing their knowledge, skills and attitudes, is essential to personal growth, job satisfaction, retention and succession planning. Not supporting incumbents in this way may corrupt leadership service, personal development, careers and organisational learning.

Third, this approach reconciles personal and organisational imperatives when constructing an overarching systemic leadership development strategy. Both pre- and in-service components, for example, need coordinated adjustment if a new policy aim is to prepare and induct school leaders into helping colleagues in clusters of schools to plan school improvements; a form of supra-school leadership termed 'system leadership.' Another example would be where both pre- and in-service components are adjusted to help democratise schooling by enabling parents and teachers to participate more effectively in school governance, evaluation and strategic planning. A third example is where the components are aligned to cohere with an aim of leadership capacity building across schools, by enabling middle and senior management to deliberately develop shared or 'distributed' forms of school leadership services, perhaps to enable a principal to contribute part-time system leadership to a cluster of schools.

From the individual perspective, a systemic leadership development strategy needs to enable aspirant and serving leaders to (a) acquire role-specific understandings, skills and attitudes prior to appointments, (b) progressively deepen their knowledge of (and professional dispositions concerning) professional leadership, as their careers unfold, and thereby, (c) guarantee successful leadership services that combine as increasingly strategic contributions in classrooms, school staffrooms and system boardrooms. Combining individual and organisational perspectives implies the need for a systemic leadership development strategy that aims to sustain leadership capacity building in all people providing leadership services, and simultaneously, capability building at each level of leadership service from team to system. The process of professionalisation is defined as mastering a specialist, validated and reliable knowledge base, demonstrably acquiring the practical skills of the field, being socialised into the culture of the body of people engaged in the calling, and adhering to the principles and ethics of best practice in that profession.

Fourth, these definitions cohere with a holistic approach to capacity building in large and complex systems (Global Development Research Center, 2008). This approach to capacity building integrates human resource development (equipping individuals with the understanding, skills and access to information, knowledge and training that enables them to perform effectively), organisational development (improving management structures, processes and procedures, and external relationships), and institutional and legal framework development (legal and regulatory changes to enhance and sustain effectiveness).

With these definitions and their assumptions clarified, I now turn briefly to the methodology used to compare and contrast current educational leadership development and capacity building strategies in Australasia to those reviewed by international policy scholarship.

Methodology

The *Background Reports*, case studies and recommendations of OCED's Improving Schools Leadership (ISL) policy research project, the preliminary findings of the International Study of Principal Preparation (ISPP) published in the Number 6, 2008 issue of the *Journal of Educational Administration*, and the detailed analyses published in the *International Handbook on the Preparation*

and Development of School Leaders were each reviewed with a view to potential application in Australasian education systems. Each of these policy research projects had unique drivers that need to be appreciated to understand their relative contributions to this study.

The aim of the OECD's ISL project was to improve school leadership development policies (OECD, 2008b). It was triggered by a realisation that school leaders in OECD countries were being challenged by rising expectations on their schools, technological innovation, migration and globalisation. Leaders in schools were being expected to provide effective management, contribute to large-scale education reform and improve student learning outcomes. The ISL project commissioned analyses of roles and responsibilities under different governance structures in 22 countries using a common framework. *Background Reports* on each country explained the policies and conditions intended to help school leaders improve school outcomes, how each education system develops and supports effective leadership, and what is regarded as the most appropriate policy future. Five additional case studies were then commissioned to better understand outstanding innovations, prior to an overall synthesis of policy levers and effective measures. This article therefore draws on all three outcomes of the ISL Project; (a) the 19 of the 23 *Background Reports* by member countries that were available in English, (b) the five case studies of innovative practices of school leadership for systemic improvement (in Flanders, Finland and England) and school leadership development strategies (in Austria and Victoria) (reported separately prior to being summarised by Pont, Nusche & Hopkins, 2008), and (c) the overall synthesis of recommendations (Pont, Nusche & Moorman, 2008).

The International Study of Principal Preparation (ISPP) project is driven by a related question; How useful are principal preparation programmes to novice principals? It is a coordinated and ongoing comparative research project underway in Australia, Canada, China, England, Jamaica, Mexico, New Zealand, Scotland, South Africa, Tanzania, Turkey, and the USA (Webber, 2008). Since the first edited collection from the ISPP project comprises interim country analyses, they were considered alongside the OECD country *Background Reports*.

The *International Handbook* used three different forms of analysis to better understand global trends and the imperatives of international policy research focusing on leadership preparation and development. It reviewed the concepts currently being used to describe trends and policy imperatives. It compared the general patterns and trends in how leaders are being prepared and developed internationally. It then described and contrasted actual preparatory and developmental practices in various regions of the world. This three-part analytic strategy was adopted by the co-editors (Crow, Lumby & Pashiardis, 2008) to acknowledge four main drivers for the globalisation of policy research and development regarding leadership preparation and succession; (a) the central role typically allocated to leadership services when seeking to achieve reform in contemporary schools, (b) evolving recognition of school leadership as an international phenomenon, (c) growing evidence of the consequences of career-long learning about leadership, and (d) emergent scholarship highlighting the need for understandings, skills and dispositions that reflect local and global purposes and ethical imperatives for leaders in education. Each of these forms of analysis helped advance an appreciation of how international scholarship might inform policy development in Australasia, next to be clarified.

Context

The education systems in Australia and New Zealand have taken quite different pathways to capacity building in educational leadership. The evolution of leadership development policies in New Zealand this century is clarified in the Ministry of Education's *Background Report* (2007) to the

OECD's ISL project. Policy evolution has been primarily evident as relatively modest infrastructure development; competency-related induction training for first-time principals, online support for practicing principals, a week-long evaluation and professional planning opportunity for experienced principals, and a pilot preparatory programme for aspirant principals. The leadership development policy process became more explicit after 2003 with (a) the gradually accelerating allocation of 'management units' for team leadership in schools in order to address the intensifying leader supply problems identified by a Ministerial Taskforce Report (2003), and (b) a systematic review of research into the leadership of learning being commissioned (Robinson, 2007). The policy process became overt in 2007 with systematic stakeholder consultations and the collaborative development of an indigenous policy of educational leadership; the Kiwi Leadership for Principals (KLP) (Ministry of Education, 2008b).

The KLP defined educational leadership generically as 'the leadership of learning' and prescribed five priorities: improving learning outcomes for all students, with a particular focus on Māori and Pasifika; creating the conditions for effective teaching and learning; developing and maintaining schools as learning organisations; making connections and building networks within and beyond their schools; and, developing others as leaders. These knowledge claims were justified by reference to "what works, the learning in the principal initiatives since 2001, such as the First Time Principals Programme, and the evidence from New Zealand and overseas about leadership and student achievement" (p. 4).

The first reason for reviewing these public policy claims is that the KLP is both authorised Ministry policy and is being taught as authoritative knowledge in the First-Time Principals and National Aspiring Principals Pilot programmes. It is not clear how the policy was systematically derived from research, how it is to be evaluated or how the knowledge it declaims is to be improved. Second, the KLP is to be the basis for another reconstruction of the Interim Professional Standards for school principals provided in New Zealand's *Background Report*. Once the revised standards are embedded in industrial collective agreements, they will become mandatory in practice and a basis for inter-professional discourse in schools about leadership services. Third, the KLP is to be further elaborated into two adjunct policies: 'Kiwi Leadership for Senior and Middle Leaders', and 'Leadership for Māori-medium Leaders', significantly extending the reach of the policy. Fourth, and most importantly, the KLP is foreshadowed to be the basis for New Zealand's 'Professional Leadership Strategy' (PLS) in school education. The PLS will be a "three to five year plan that will outline how the Government intends to work with the sector to strengthen school leadership" (p. 6). Fifth, there is no recognition in the KLP of twin crises in the quality and quantity of leadership supply; the accelerating leadership turnover due to the retirement of Baby Boomers, and the rapid expansion in early childhood education provisions unmatched by leadership preparation. It is timely that international policy research is used to benchmark the KLP policy prior to its implementation via the PLS.

The OECD's *Background Report* on Australia (Anderson et al., 2007) explained that, while there is much custom, plan, practice and infrastructure, there is, as yet, no agreed national policy concerning educational leadership development. This reflects a national constitution that assigns education by default to be a responsibility of the states and territories, although Federal authorities have long used their funding power to adjust policies and accountabilities (Cuttance, Harman, Macpherson, Pritchard & Smart, 1997). In more recent times, inter-state cooperation between state and territory Ministers of Education meeting at the Ministerial Council for Education, Employment, Training and Youth Affairs (MCEETYA) has developed broad directions and strategies (MCEETYA,

2003). There is a set of interim national goals to be used as reference points for strategies, benchmarks and standards. There are ongoing efforts to establish national measurement and reporting of student learning outcomes (MCEETYA, 2008). And there are national taskforces, working parties, committees, studies and reports addressing particular topics and reporting on progress. One example is MCEETYA's Improving Teacher and School Leadership Capacity Working Group that has been considering the development of a common framework for teacher quality and standards. This could lead into consideration of a national framework for educational leadership services and help further strengthen teacher and leadership professionalism.

More generally, Australian policy research that built on the *Background Report*, and were presented in the *International Handbook* (Anderson, Kleinhenz, Mulford & Gurr, 2008), shows that policy development this century concerning the capacity building of educational leadership in state education systems has continued to accelerate and has come to be dominated by two concerns: how the learning of leadership might help improve schools, and the coming crisis in the supply of quality applicants. One indicator, the educational levels of leaders in educational leadership, suggests that Australasian systems have very different policies at marked variance with international thinking. About 44 percent of Victorian school leaders, 34 percent in NSW, and 53 percent in Tasmania hold postgraduate qualifications in educational leadership (Gamage & Ueyama, 2004; Gurr, Drysdale & Goode, 2007). The comparative percentage in New Zealand is likely to be between 12 percent (Robinson, Eddy & Irving, 2006) and 9 percent (Robinson, Irving, Eddy & Le-Fevre, 2008). In England, the Secretary (Minister) for Education has recently announced that "we will make teaching a Masters level profession" (Balls, 2008). His then Under Secretary for Education, Lord Adonis (2008), explained that this initiative was part of a wider search for policy and funding options: "In Finland I was struck not only by the extraordinary social status of teachers – 10 applicants for every teacher training post – but also by the fact that almost all teachers either have a masters degree or are working towards one, their courses including practical projects to improve their pedagogy. When I asked the head of a primary school in suburban Helsinki what was the biggest staffing problem she faced, she replied: "My best teachers going to do PhDs"."

This takes us to the supply of quality applicants. Most Australian school systems (public, religious and private) have developed leadership succession plans that trace a 'leadership journey' and thereby (a) identify potential leaders, encourages aspirant leaders, offers role induction ('tool kits', mentoring, shadowing, etc.), (b) recommend in-service succession strategies (coaching, higher learning, recognition, etc.), (c) enable strategic leadership (mentoring, exchanges, sabbaticals, etc.) and (d) facilitate transitions (project leadership, consultancies, retirement, etc.). There are many providers at state, territory and national levels of preparatory and in-service professional learning for principals. There are a number of state leadership centres, such as the South Australian Centre for Leaders in Education, the Western Australian Leadership Centre, and the Indigenous Education Leadership Centre in Queensland, in addition to the postgraduate programmes available in educational leadership in universities in every state and territory. Further, the independent national body for the teaching profession, the Australian Institute for Teaching and School Leadership (known as Teaching Australia), has delivered a professional leadership development programme, 'Leading Australia's Schools' since 2006, in collaboration with the University of Melbourne and the Hay Group. It runs two three-month courses annually for cohorts of 40 principals from all Australian states and sectors who self-select a challenge, set goals and evaluate their achievements with peer group support, coaching, tutorials and guidance.

One driver of educational leadership policy development in Australia is professional associations pressing for the professionalisation of school leadership using (a) profession-wide standards (or a 'Learning Framework' in Victoria) that describe the knowledge, skills, values and dispositions of effective school leaders, (b) infrastructure for professional learning that supports people as they gather evidence of meeting standards, (c) fair, valid, consistent and reliable assessment leading to certification, and (d) recognition and reward, such as progression in a career structure or increased financial remuneration. Notably, the majority of standards frameworks for school leadership have been developed by state ministries in collaboration with professional associations (in particular the Australian Council for Educational Leadership (ACEL) and 'Principals Australia', formerly known as the Australian Principals Associations Professional Development Council) and specialist researchers. These initiatives also typically draw on international empirical evidence of what leaders actually do, contemporary challenges, and influential ideas about what they should do.

Another driver of educational leadership policy development across Australia has been growing recognition of the needs of new target groups for leadership preparation; including assistant principals, teaching team coordinators, women, Indigenous leaders, mid-career principals, team leadership in learning communities and small school leadership. The content of learning for leadership reflects the growing ubiquity of standards frameworks and yet commonly includes the functional basics of leading pedagogical, curriculum and organisational development, using information and communication technology, financial and human resource management, and school planning and accountability. Active learning methods are becoming relatively common, including lengthy, structured and mentor-supported internships, induction programmes, shadowing, coaching and reflective conversations, problem-based simulations, case analyses, learning journals and portfolios. Hence, and on the basis of the evidence gathered across Australia, Anderson, Kleinhenz, Mulford and Gurr (2008) concluded that even greater attention should now be given in Australian school education systems to learning about shared leadership, the growing diversity of leaders and students, increasingly significant school-based responsibilities, the resource base of leadership development, and the emerging national and international evidence base of leadership standards and their effects.

It is noteworthy that Victoria's integrated system approach to school improvement and leadership development was selected by the OECD for case study analysis because of three factors: the extent to which research informs the State's strategies, the close coherence achieved between system and school leadership through leadership capacity building, and the creation of a shared culture of school improvement. The case study evaluation (Matthews, Moorman & Nusche, 2007) comprised three days of meetings with stakeholders (federal, state and regional officials; national and university researchers; school principals, teachers and students in two schools; leadership development providers; professional associations and other organisations), and a review of policy documents from the Victoria's Department of Education and Early Childhood Development (DEECD), the OECD's earlier *Background Report* on Australia (Anderson et al., 2007) and pertinent international literature.

Victoria is Australia's smallest and most densely populated mainland state, highly urbanised and very culturally diverse. The economy has been growing well in recent decades, moving from a reliance on traditional manufacturing towards becoming an increasingly knowledge and service-based economy. Successive governments have expected schooling to provide students with the knowledge, skills and technical capacities they need to participate effectively in a rapidly changing society and global economy. As with all Australian schools, Victoria's students achieve good to

excellent results. The 'performance gap' between the highest- and lowest-achieving students is smaller than the OECD average and the 'tail' of those underachieving is less than the average for the OECD. As in most countries, the location of school, the language spoken at home and the family's socio-economic status each appear to have a significant effect on student performance.

Victoria has the most highly devolved government school system in Australia with school councils empowered to set school directions within national and state guidelines and to delegate operational decision-making powers to their principal. Principals are required to work with their colleagues and community to develop strategic plans with outcome targets and improvement strategies. The operational authority vested in principals tends to be shared with assistant principals, distributed to team leaders, and increasingly, re-vested upwards into collaborative networks of clusters of schools. Those providing leadership services are aging and increasing numbers are retiring when about 55 years old. In February 2007, Victoria had 1,594 government schools employing 38,600 teachers, with about 270 schools with fewer than 70 students, many in remote locations (Matthews, Moorman & Nusche, 2007). With some differences in scale, these patterns of school governance, management, demographics and distribution of schools by size in Victoria are broadly similar to those reported in New Zealand's *Background Report* to the OECD (Ministry of Education New Zealand, 2007), suggesting that New Zealand and other Australian states might consider the reasons for Victoria's apparent success.

The nature of Victoria's systemic school improvement and leadership development strategy was traced by the OECD case study from the Labor Government's *Blueprint for Government Schools* (DEECD, 2003). The *Blueprint* was in response to consultations and research that found high concentrations of poor outcomes in some schools and some regions, high variations in outcomes between classes in a given school, and variations in outcomes between schools with similar student populations. The *Blueprint* set three priorities to improve student learning outcomes: recognising and responding to diverse student needs, professional development of educators to enhance the teaching-learning relationship, and continuously improving schools. The *Blueprint* then set seven 'Flagship' strategies for addressing the three priorities, each strategy elaborated with ambitious and comprehensive sets of initiatives. The OECD case study came to the view that "The *Blueprint* provided a powerful and comprehensive agenda for educational reform, backed by political will and resources. It also introduced the operational challenge of implementing the raft of measures in a coherent and effective way so that they had the desired impact across the State" (Matthews, Moorman & Nusche, 2007, p. 11).

It noteworthy that the DEECD had decided in 2003 that a cultural transformation of government schooling was essential to achieve the reforms desired, and, further, that "the best way of achieving this and delivering the range of reforms was to invest in school leadership, particularly by developing and, in effect, re-professionalising the principals and assistant principals who comprise the 'principal class' in the system" (DEECD, 2003). It drew on international research to identify the most important characteristics of effective schools, effective leaders and effective professional learning, published evidence-based models in each of these three areas, and then used them to build shared understandings of how the education workforce relates and impacts on student outcomes. The 'Effective Schools Model' was used to elaborate strategies to implement the *Blueprint* (DEECD, 2007).

The designated change managers were the deputy secretary (a reputedly highly successful ex-principal) and his colleagues in the Office for Government School Education (OGSE), nine regional directors and their colleagues, and about 1800 members of the Principal Class, whose schools are

grouped in 64 networks, each chaired by a principal. Local groups of schools also belong to other partnerships such as the 'Collegiates' which form to work on shared interests and joint projects. The OGSE used this tightly coordinated and multi-layered form of system leadership (Matthews, Moorman & Nusche, 2007) to share best evidence from international sources, in *Learning to Lead Effective Schools* (OGSE, 2006), and then to systematically implement the Victorian leadership development strategy, *The Developmental Learning Framework for School Leaders* (OGSE, 2007). Unlike many international examples, this *Learning Framework* did not seek to implement the *Blueprint* vision through a set of leadership standards or benchmarks but by defining progressive levels of competence or performance in five domains of leadership; technical, human, educational, symbolic and cultural, from an evidence-based model of transformational leadership (Sergiovanni, 1984, 2005). The *Learning Framework* has spawned at least 19 customised forms of fully-funded preparatory and in-service professional learning opportunities: (a) for selected target audiences (current and aspirant leaders of teaching teams, school leadership teams and small schools; assistant principals; newly appointed and highly experienced principals; women leading teachers; high potential leaders; experienced and expert teachers; and professional development coordinators), (b) to offer role-specific content (pedagogical leadership, human resource management, strategic planning, capacity building, etc.), and (c) to provide a mix of practice-based and reflective learning modes (professional leave, contracted research and development, coaching, mentoring, seminars and postgraduate courses and programmes, including the Master of School Leadership developed in collaboration with two leading universities) (Matthews, Moorman & Nusche, 2007).

The OECD evaluation found that the systemic approach to school improvement in Victoria since 2003 had created a culture that is clear, convincing, research-based and integrated with professional learning and leadership development. The approach had also resolved parallel policy challenges as it had proceeded. For example, the *Performance and Development Culture Framework* (DEECD, 2007) had reconciled the need for public accountability with capacity building by developing a rigorous method of self assessment to accredit school quality. It has also mobilised implementation programmes that were comprehensive and action orientated, used a simplified evidence-based theory of action (Fraser & Petch, 2007) and offered school-based leadership development opportunities.

The evaluation also showed that the reforms had been planned to impact over years as a carefully calibrated reform process with political support and investment directed at building the ability of leaders to learn, to lead others to learn, and to sustain systems of continuous improvement. Highly facilitative policy conditions identified by the OECD team included: continuing political support; a high degree of alignment between all reform strategies; an 'intelligent' accountability framework that enabled the system to respond appropriately to accumulating evidence of student outcomes and trend data; funding that enabled heavy investment in human capital development to achieve ambitious expectations about school improvement; and a general willingness to wait for evidence of effects to emerge as cultural change occurred over time. The other strengths of the leadership development strategy identified were the internal coherence of the reform process, the intellectual engagement of the education workforce and clear expectations for school leadership. The focus on performance development, continuous learning linked to school-based plans and challenges, and an emphasis on peer learning were also highlighted.

On the other hand, outstanding challenges were also noted with the Victorian approach: dependency on current system leaders; troubling achievement gaps; the need to involve parents and community more; the limited integration of small, rural and isolated schools; the slow transformation

of classrooms; the use of some over-complicated theories; and the need to penetrate below the Principal Class. Other possible limitations to Victoria's approach not raised in the OECD evaluation are about quality, equity and sustainability. It is yet to be proven that the integration of professional learning, leadership development and school improvement makes a significant difference to either student achievement or the equity of outcomes. It is yet to be shown that the systemic enculturation processes can be extended into teacher selection and preparation. The theory base of the approach is yet to be evaluated in context and further advanced. It is not clear if the investment levels in leadership development can be maintained in an economic depression. The innovation allocates an unusual degree of power to relatively few experts comprising an elite class of professionals, which could yet precipitate challenges given Victoria's history of democratisation and decentralisation in education (Macpherson, 1986, 1987). Nevertheless, in the interim, the OECD case study concluded that "in international terms, the Victorian model of leadership development is at the cutting edge" (p. 28) and "provides a working model of system-wide school leadership development from which other systems can learn" (p. 31).

Findings

North America

Young and Grogan's (2008) review of leadership preparation and development strategies in three North American countries showed that the primary means of pre-service preparation of principals and superintendents in the United States of America (USA) was by masters degree programmes (472 institutions), specialist degrees (162 institutions) and by doctoral degrees (199 institutions). In-service education is delivered primarily by professional associations or by collaboration between universities and school districts. The focus in pre-service and in-service education has shifted in recent decades from school management to leadership in decentralised systems that share governance, enable participation in decision making, develop school-based councils and provided leadership for learning. Most notably, the contemporary preparatory programmes identified as exceptional by peers were found to exhibit common components: the selection of students in cohorts, a curriculum framed by state licensure policy and the ISLLC standards (CCSSO, 2007), constructivist pedagogies (characterised by problem-based and case-based methods, action research and reflection), field-based experiences (internships, practica and other forms of experiential learning), and university-district-school partnerships that designed and delivered programmes that confront current challenges.

Young and Grogan also showed that the pre-service preparation of district superintendents in the USA is delivered almost entirely by education doctorate degrees that specialise in educational leadership. They also noted recent alarm in some districts over the dilution of the leadership focus of EdDs and how a consortium of universities has responded with learning experiences that are even more focused on leadership challenges. They attributed the gradual improvement in the representation of women in leadership positions and in preparation and doctoral programmes to the emergence of a robust literature in recent decades, challenges to the use of stereotypes in determining opportunities and the growing diversity in non-traditional leadership styles and expectations. Finally, while the standards and accountability movements have sharpened attention on quality content, pedagogy and assessment, Young and Grogan concluded that relatively little attention has been given in the US to the career-long, cumulative, higher quality and deep learning of leaders and to global experiences and perspectives.

This conclusion coheres with Kelley and Peterson's (2007) findings that a large proportion of principals in USA schools are due to retire in the next three to five years, that the number of quality

applicants for their positions appears to be falling, and that a crisis in supply is caused by inadequate systems of recruitment, screening, selection, and training of candidates for principalships. Their analysis also implied a deep-seated ethno-centrism in USA pre-service and in-service programmes for school leaders. They concluded that this crisis could impact the quality and improvement of American public schools. Their analysis and conclusion was affirmed by the recent ISPP qualitative study (Nelson, Colina & Boone, 2008) into the experiences of four novice principals over a two-year period. It showed that the current climate of efficiency and accountability in the 'systemworld' influenced principals, through the processes of role socialisation, to focus on the technical aspects of administration, over the relational and instructional aspects of leadership in their school's 'lifeworld'.

In Canada, Young and Grogan found that while some provinces require school principals and vice-principals to be certified, many do not, although many school districts expect candidates to have a Masters degree prior to appointment. Certification commonly requires teaching experience and Masters degree course work, the latter typically once co-designed with teachers' federations and ministries and offered through university summer schools. The Masters course work content tends to be drawn from the social sciences and includes learning, leadership, administration and research components. Courses tend to be organised as cohort-based and on-campus instruction with increasing access to flexible and distance delivery. Conversely the courses tend to lack aboriginal leadership content and students, and without specialist faculty, offer relatively little indigenous leadership content or attend to the socially-critical and economically-critical needs of northern communities. Canadian employing authorities were found to be more inclined than those in the United States to expect school leaders to act as a major force for community building by including communities of difference using forms of cultural democracy. While Canadians apparently tend to define multiculturalism as both the recognition of cultural diversity *and* social equality for members of minority groups, Young and Grogan suggested that American authorities tend to acknowledge the role of minorities in the nation's history and culture, and yet expect the cultural identities of ethnic and minority groups to blend into one societal culture.

Their review also found that most decision making power in Mexican schools has traditionally been held by the Educational Workers' Union (SNTE), to which all teachers and principals belong. The SNTE has long held the power to hire and fire educators. While principals have been expected to manage school routines, they have lacked the authority to lead and have tended to resist change. The appointment of principals and supervisors was reportedly based as much on political patronage and nepotism as upon leadership capabilities achieved through preparatory learning and experience. Responsibility for curricula design, teacher evaluation and resource distribution remained with the national department of education. Recent decentralisation has apparently relocated operational planning and personnel management with local government authorities and now expects supervisors and principals to lead improvements to teaching and school performance, compensatory programmes in neglected areas, and more accountable student evaluation systems. The preparatory Masters programmes, prior to generic administrative service in elementary, secondary and higher education, reportedly focused on global and collective approaches to problem solving and on the historical and social context of education, with a research thesis required. Outcomes included the valuing of uncertainty avoidance, teamwork, collectively-managed change, trust, humility and honesty. On the other hand, cited women's studies in Mexico suggest that the powerful male elite in the SNTE plays a more important role than formal qualifications or experience in advancing careers, also favouring those trained as teachers in public normal schools as opposed to private schools.

Latin America

A review of preparatory and succession programmes in Latin America (Ventura, Costa & Santos, 2008) noted that Argentina, Brazil and Chile share a common colonial heritage of centralised administrative systems that are characterised by hierarchical command structures and relatively homogenous management systems. These characteristics are still evident today in the national systems used for the improvement of the quality of education, in new national curriculum content, in teacher in-service training in schools that focuses on new content and teaching competencies, in teachers' pre-service training in new institutions, and in the national school equipment programmes providing pedagogical and technological resources. Simultaneously, since the 1990s, there has also been a drive to democratise school management, compensate schools addressing inequities, and decentralise policy implementation to schools so that they can give greater priority to efficiency, quality, national competitiveness, globalisation, the knowledge society and multiculturalism. The policies of decentralisation and greater school autonomy were also intended to enable schools to become more responsive to their communities and become more effective and efficient.

In this context, preparatory programmes are offered by a wide range of providers (universities, teacher training and teacher union institutes, national and provincial/ state programmes and foundations). They tend to be functionally generalist rather than specialist in focus, very often mandatory and have limited relevance to school leadership. Instead, on-the-job training is more the norm of performance development for school principals in an ambiguous context of ambitiously reformist policies and uneven decentralisation.

Chile is an interesting case. The *Background Report* (Díaz et al., 2007) noted that the military government's reforms of the school system between 1973 and 1990 sought to decentralise administration, introduced a voucher system to enable parental choice of schools and encouraged government-funded private schools. They also explained how the four democratic governments since 1990 have overlaid yet not replaced these arrangements with initiatives by the Ministerio de Educación de Chile (MINEDUC) that were aimed at achieving greater quality and equity. One initiative was making student assessment and school performance data available to different school stakeholders, including parents. Another has been the introduction of a framework of standards for teacher performance, assessment, advancement and awards. A third has been to introduce fixed term appointments and opening up competition for school leadership positions using national performance criteria.

A fourth, and most influential initiative regarding the quality of leadership in schools, has been the introduction in 2003 of the Good School Leadership Framework (MBD). The MBD clarified performance standards and provided guidelines for the professional development of 'teaching leaders' and 'technical-pedagogical' staff for all stakeholders, including the universities who are the main providers of teacher training or professional development for teachers and leaders. In 2005, the MINEDUC introduced the National Performance Assessment for municipal Head Teachers and leadership teams (i.e. Head Teachers, technical pedagogical heads, counsellors, and all staff on contract for school management and technical pedagogical functions). This national system was meant to be implemented by the municipal education system but few have apparently taken up the responsibility. A parallel financial incentive scheme has been introduced to reward leadership teams that accomplish outstanding goals and targets.

Díaz et al. (2007) concluded that the greatest weaknesses in Chile's educational leadership development strategy were in professional training, initial training and professional development studies. They traced these weaknesses to the extent to which higher education is still subject to

the laws of supply and demand, rather than to national priorities and investment regimes that are intended to address priorities and achieve targets and compliance. While the MBD policy has developed high levels of commitment by stakeholders, they also report that this approach has yet to set the right incentives on supply and demand for the development of school leaders. On the other hand, they also noted the major strengths of the MBD as public policy: (a) its coherent integration of purposes, orientations, and comparative international studies, (b) a systematic and reflective approach to the development of regulations, interventions and evaluation, (c) its elaboration as a School Management Quality Assurance System in order to “promote and strengthen the autonomy and the responsibility of school organisations and educational communities for more relevant educational processes, especially Curricular Management, Leadership, School Coexistence, Resource Management, and Educational Outcomes” (Díaz et al, 2007) and (d) the development of resources and support systems for educational managers.

The outstanding challenge identified by Díaz et al (2007) was the current culture and infrastructure of leadership and governance in Chile’s school system. They were characterised as (a) having age and gender ratios that are antagonistic to change, (b) assuming that the policy of ‘decentralisation’ legitimates ‘school autonomy,’ internally focussed management, highly authoritarian leadership styles, and resistance to change and accountability, (c) managing the supply of pre- and continuous in-service training through the market, rather than by government planning and investment, (d) using a diversity of capacities, approaches and funding arrangements (despite the national MBD and QA systems) to recruit, induct and develop school leaders and leadership teams, (e) not using evidence of institutional improvement and learning outcomes to improve initial and continuous leader training, as well as feedback on public policy, (f) potentially allowing political conditions to undermine a new mandatory School Leader Accreditation System, (g) potentially allowing the capacities in the MINEDUC’s System of Advice and Assessment to be greatly reduced by insufficient specialisation or necessary resources, and (h) not having the research capacity to monitor and evaluate the efficacy and appropriateness of the new systems with regard to achieving the twin policy objectives of more equitable education and quality learning for all students.

Europe

Møller and Schratz (2008) examined four general cases in Europe and showed that leadership preparation and succession provisions reflected both the historical and socio-cultural contexts, with recent changes often relating to policy shifts in educational governance and accountability. They traversed England, Scandinavia (Denmark, Norway and Sweden), German-speaking countries (Germany, Austria and Switzerland), and Eastern Europe (the Czech Republic and Hungary).

In England, they found that the traditional ‘headmaster’ role had been overlaid in recent decades with aspects of centralisation (national curriculum, school choice, standardised assessment and public performance data) and decentralisation (local planning, budgeting and governance), and yet still provided some discretion for proactive leadership, although increasingly shared and distributed.

In Scandinavia, they found that welfarism persists as a strong ideological and political tradition, and that schools and their leaders have long been expected to help deliver equity of opportunity and socially-just life conditions in a democratic society. The autonomy of teachers has been strongly challenged by stakeholders in recent decades leading to policies favouring school choice, deregulation, evaluation and managerialism, in a context of strong unionism.

While Switzerland has a long-standing cantonal democratic tradition, and Germany and Austria share a heritage of powerful monarchies and multi-ethnic empires, they are being compelled by

costs to rationalise layers of government structures. All three have tended to create non-government institutions and agencies to manage systems and to standardise school self evaluation and student assessment, often using flat hierarchies with distributed internal leadership and external 'guardians' to monitor effectiveness to sustain a myth of equality between educators.

In Eastern European countries, the rapid change from single party regimes and command economies to multi-party democracies and market conditions has also ushered in forms of public administration that seek to balance responsibility for public education between central and local authorities. Møller and Schratz reported that schools given varying degrees of autonomy, have trialled various management models borrowed from the West, leading to a growing realisation that evidence-based professional leadership is now urgently needed in education to sustain reforms in complex circumstances.

Overlaying the rationalisation of structures and hastened evolution of leadership across Europe have been trans-national initiatives. The European Union (EU) has sought to build a new European identity to replace bitterly sectarian identities from a divided past. The Organisation for Economic Co-operation and Development (OECD) has used large scale international comparisons (e.g. the Programme for International Student Assessment, PISA) to focus European nations' attention on the quality of learning. Similarly, the OECD's (2008a) 'Improving School Leadership' (ISL) project has enabled eighteen European countries to identify and benchmark forms of school leadership considered essential to large scale reforms and improved learning outcomes, inevitably leading to an increasing rate of governance policy duplication and leadership standards that are believed to be causally related to effective innovation in Europe, England and the United States.

On the other hand, the implementation of increasingly homogenous policies in Europe continues to play out differently in local settings due to residual ideological, political and structural conditions, and to the methods employed (Møller & Schratz, 2008). Included here are quasi-market mechanisms (e.g. competition between schools, parental choice, high-stakes testing, ranking schools using aggregated student achievement scores), new public management methods (e.g. gaining service delivery efficiencies through installing performance-orientated cultures, decentralising accountabilities and privatising support functions), old public management techniques (e.g. administrative socialisation into an ethic of rule following and public service), professional accountability systems (e.g. site-based management and professional powers balanced by reporting against standards, rigorous evaluation and high-stakes accountability for student achievement), and self evaluation tools (e.g. delivering rigorous public accountability and capacity building of schools while avoiding the costs of external quality assurance). This continuing heterogeneity of implementation methods, conditions and learning outcomes in schools appears to be driving "a trend towards formal requirements to qualify for leadership positions in most countries which implies a stronger professionalisation of school leaders" (p. 351).

The ISL Project showed that all 17 European countries have professional associations or unions that include teachers and school leaders, as well as 11 countries also having separate associations for school leaders. Only England and Scotland require formal pre-service training for school leaders, seven countries require prior teacher education and experience, while Norway and the Netherlands do not require prior teacher training. Twelve countries require teacher education, experience and formal preparation *after* being appointed. Møller and Schratz (2008) also noted a tendency for them to consider, trial or partially adopt, English practices, which are now examined in more detail.

England

England's Teacher Training Agency set up the first national and now mandatory qualification for aspiring headteachers in 1997, the National Professional Qualification for Headship (NPQH). The two main headteachers' unions became major providers of pre-service and in-service education for their members, and the lead national professional association, the British Educational Leadership, Management and Administration Society (BELMAS), offered networking, research and information services. The NPQH was criticised for having a monopoly while being disconnected from the long-standing masters, doctoral and research programmes in British universities that were refining the knowledge base of the field. These and other doubts led to the current review. The National College of School Leadership (NCSL) was established in 2000 as a government-owned agency to deliver school leadership development and fund leadership research from an annual budget of £100 million. Interestingly, it adopted a career-based model of school leadership development (emergent leadership, established leadership, entry to headship, advanced leadership, and consultant leadership). It used a range of delivery systems: short courses, mentoring and coaching support in weaker schools. Despite the programme reach and research funded by the NCSL, the national strategy has been criticised for (a) scale being favoured over quality, depth and research, (b) significantly fewer practitioners engaging in postgraduate learning, (c) national managerial standards being ingratiated through assessment regimes (Gronn, 2003), (d) the marginalisation of critical perspectives by policy entrepreneurs (Gunter & Forrester, 2008), (e) the production of a centralised branded form of effective leadership (Gunter & Fitzgerald, 2008), and (e) its unknown cost effectiveness (Bolam, 2004).

These developments in provision occurred against a background of changing forces and relationships between school and system leaders, as described in the *Background Report* for England (Higham, Hopkins & Ahtaridou, 2007). The Local Management of Schools policy in the *Education Reform Act* (1988) took schools out of the direct financial control of local authorities. Devolving resource allocation and priorities from local authorities to school governors gave greater discretion to head teachers, despite the strictures of the national accountability framework, which held them accountable for school performance and for compliance with other national policies, and exposed them to the higher degree of competitiveness triggered by the public release of exam results and the national inspection regime. A number of Government initiatives then significantly accelerated the professionalisation of school leadership. Included here were the establishment of the National College for School Leadership, incentives to collaborate in city and regional planning and professional leadership networks, and the 'New Relationship with Schools' (OfSTED, 2008) that was intended to blend summative public accountability with formative school self-evaluation and improvement planning and ensure a more personalised education for students. More recently school leaders have been pressured by fresh dilemmas, such as finding the most appropriate balance between standards and welfare, and between school diversity and parental choice. They have also been expected to lead networking and collaborations with other schools to assist with system transformation. This system leadership is invariably aimed at achieving higher standards of students' outcomes.

In this context, Higham, Hopkins and Ahtaridou (2007) identified six key trends that may well have their equivalents in Australasian settings:

1. School improvement being driven by the monitoring of overall increases in student attainment and the narrowing of achievement gaps between specific social groups, leading to the refinement of accountability processes to enable sharper interventions and school closures/

reopenings, and growing expectations that expert school leaders will offer system leadership services;

2. Succession planning being driven by middle and senior management recruitment and retention pressures in schools, leading to schools planning sustainable leadership succession, a wider distribution of leadership responsibilities and supporting system leadership capacity building;
3. School governance being refined to improve community consultations, school policy making and their support and challenge of school leaders, leading to greater autonomy from the local authorities and more school federations, partnerships with sponsors and collaborative initiatives;
4. Learning being more personalised in a context of a broad and balanced education enabling each child to reach their potential, leading to the provision of learning pathways and motivational learning, school leadership of assessment for learning and learning skill frameworks, teaching that addresses student diversity, and schools extending their services through subcontractors or subcontracts;
5. Leadership and teaching being more professionalised, leading to the construction of professional learning communities within and beyond schools, collaboration with wider sets of providers and professionals, and system capacity building informed by 'intelligent accountability' systems; and
6. Mandatory preparation for schools' head teachers and academies' principals and continuous professional development of school leaders, leading to leadership training and standards that commonly exhibit problem-based learning, active learning, self-directed learning, more effective transitions into new leadership roles / practice, with on-the-job experience supported by coaching, reflective practice and feedback, and a wider repertoire of practice more responsive to context.

Two conclusions were offered. First, a new compact is needed between school leaders, local government, national agencies and central Government, one that "rebalances from challenge towards support for school leaders, with more effective leadership of learning in schools, a greater focus on a smaller number of priorities encouraged and supported in individual schools and fewer short term initiatives and bureaucratic demands from the centre" (p. 75). Second, some of the educational leadership challenges faced in England appear to require solutions that lie outside current ways of thinking and operating. They are, by definition, adaptive challenges, and demand leadership that "generates capacity to enable people to meet an ongoing stream of adaptive challenges. Ultimately, adaptive work requires us to reflect on the moral purpose by which we seek to thrive, and demands diagnostic enquiry into the realities we face that threaten the realisation of those purposes. ... Tackling adaptive challenges represents the next phase of the journey" (p. 75).

System leadership has been strongly promoted by the OECD case studies as a method of enabling 'adaptive work'. An example is in the case study of innovative practices in England (Huber, Moorman & Pont, 2007). It used a vertical sample to interview senior personnel over four days in the Department of Education and Skills, professional associations and training providers, the National College of School Leadership, a Local Education Authority and two school communities. It came to the view that the creation of the NCSL and the different training and development programmes available for all levels of leadership had contributed to a more professional culture of school leadership.

The case study stressed, in particular, how system leadership is helping to boost school performance, support reforms across schools, spread leadership expertise more broadly, and provide for leadership succession. System leadership was associated with common positive characteristics: clear core purposes; an outcome and performance orientation; an individual approach to improve learning outcomes through the intensive use of data; a culture of formative valuation and assessment; a positive resource-oriented approach to initiatives; professional development most often needs-oriented in-house training that enlarges the school's leadership capacity by mixing leadership opportunities with training; and cooperation and collaboration that empowers team work among the pupils as well as the staff. Systemic leadership was reportedly enabling the distribution of leadership throughout schools and system levels and stimulating the development of each school's and system's learning communities. It was also claimed that systemic leadership was fostering initiative, distributed decision making, local experimentation, pervasive and timely communication, and self-organised improvement. It was concluded that systemic leadership is becoming a powerful tool for building and distributing capacity in a system of schools.

The growing ubiquity and claimed effectiveness of system leadership in England must, however, remain open to question until further research maps and evaluates the changes. The OECD case study conclusions may be premature, unrepresentative of the general situation, or possibly, clarifying the shared perspectives of a policy elite (Putnam, 1976). A study of written and oral policy texts over the last decade in England has clarified the concepts and perspectives of the ministers, civil servants, advisors and consultants directly involved in the construction and implementation of school leadership policy. It concluded instead that "the model in play in education policy in England is that of the single person as organisational leader. This person is responsible locally for the delivery of national policy, and they are accountable directly to government for outcomes. While there has been much rhetoric and some training provided for hybrids such as 'distributed' and 'total' leadership, the primacy of the single person remains, with distribution coming downward, and used as a form of sophisticated delegation and technical job redesign" (Gunter & Forrester, 2008, p. 159).

The Celtic States

The *Background Report* on Scotland (SEED, 2007) explained that legislative and executive responsibility for education and training moved to the new Scottish Parliament and Executive on 1 July 1999. When the new Scottish Executive (2003) clarified its view of educational leadership, as effective school leadership and management, it established a framework of professional progression in educational leadership through four broad levels; project leadership, team leadership, school leadership and strategic leadership. The declared purpose of the *Continuing Professional Development for Educational Leaders* policy framework was capacity building in leadership from the classroom to the system, and set priorities for leadership: school transformation and improvement; integration of children's services; pedagogical leadership; and leading broader educational communities. At the same time, the detailing of roles, delegations, responsibilities and accountabilities of teachers "occupying formal position of authority" (pp. 27-29) stressed the need for effective management services and for headteachers to report directly to their local authority, for example, on progress regarding their school improvement plans.

Since 2005, the Scottish Executive has expected all headteachers to have achieved, or be working towards achieving, the Standard for Headship (SfH). Appropriate evidence of having

achieved the SfH is to be demonstrated by completing a programme deemed equivalent to a postgraduate diploma; the Scottish Qualification for Headship (SQH). The SQH is delivered by regional consortia of local authorities and universities that are licensed by the General Teaching Council for Scotland. The SQH is open to teachers registered with the General Teaching Council who have five or more years of teaching experience, and is fully funded by the Scottish Executive. Participants learn through face-to-face events, online learning and supported study, and by leading whole school improvement projects in their school, reflecting on their practice and recommended research literature, and interacting with peers, mentor and tutors. The four semester-long units traverse concepts of educational leadership and methods of developing capability for improvement, and lead into an 18-month work-based project, together providing evidence to support a claim for competence against the SfH. The local authorities also offer customised induction programmes for new school leaders, tending to stress key relationships, organisational functions, access to appropriate information and tools, key responsibilities and management procedures.

The reported strengths of the Scottish policy on school leadership and development were identified in SEED (2007, p. 84): the SQH and more flexible and emergent routes to SfH; increasing budgetary control for school leaders; progress towards gender equality in leadership; significant contribution of headteachers to national and local authority developments and their recognition as distinct stakeholders; growing interagency practice; high coherence between policy and the perspective of the profession; support and challenge from local authorities limiting the isolation of school leaders and promoting corporate collegiality; and the combination of school self evaluations and external inspections by Her Majesty's Inspectors helping headteachers focus on the quality of learning and teaching. Acknowledged weaknesses in current policy on school leadership development included: training and support not perceived as meeting challenges; the low specificity of the 'leadership agenda' and system expectations of school leaders; lack of succession planning and attention to falling numbers of applicants for headships; a large number of simultaneous and sometimes contradictory initiatives or policies; isolation, especially in rural schools; the temptation to fall back on charismatic leadership models; limited capacity for interagency practice; and, contradictions between requirements regarding collegiality, responsibilities and accountabilities (SEED 2007, pp. 84-85). It was expected by the Scottish Executive that future policy development regarding school leadership would have to address up to ten issues: alternative routes to headship; improving succession planning and the number of applicants for headship; devolution to enable school development planning to take precedence over system priorities and initiatives; improved staff development through coaching and mentoring; enabling more 'distributed leadership'; management through consultation and negotiation with school staff; greater staff diversity; learning communities; and, building leadership capacity in interagency practice. This apparent commitment to pragmatic and incremental capacity building is consistent with the absence of a theoretical and research base in any of the key policies: the *Standard for Headship* (Scottish Executive, 2002), *Continuing Professional Development for Educational Leaders* (Scottish Executive, 2003) or in *Ambitious, excellent schools. Our agenda for action* (Scottish Executive, 2005).

The *Background Report* on Scotland triangulated in most respects with independent research, the greatest exception being the degree to which principals are prepared for strategic leadership through capacity building in critical analysis and research. An ISPP study (Cowie & Crawford, 2008) investigated the extent to which the SQH programme coheres with what is expected of principals and what they actually do. Given Stevenson's (2006) research about the career socialisation processes of principals, Cowie and Crawford examined the SfH and found "opposing narratives One narrative

is to do with developing capability and improvement, but the other is about accountability and policy implementation. This raises fundamental questions about how principalship is conceptualised in Scotland, about how principals are developed and about the extent to which new principals are free to act in principled and innovative ways" (p. 687). Preliminary and unsettling answers came from five relatively new primary school principals who maintained monthly logs over a six-month period. The data suggested that the SQH programme appears to help develop the professional identity of aspiring headteachers, broaden their outlook and develop confidence and self-belief. What was far less evident was the extent to which the programme was "developing principals' strength of purpose to challenge prevailing orthodoxies and work towards schools centred on educational values" (p. 688). Put simply, the socialisation of new principals could be favouring the reproduction of Scottish schools rather than their transformation.

Northern Ireland's *Background Report* (FitzPatrick, 2007) explained that 'school leadership' is increasingly understood to mean a 'leadership group' comprising principals and vice-principals. The terms and conditions of these roles, and those of 'qualified teachers,' have, however, been defined by statute and largely unchanged since 1987. Principals are legally responsible for the internal organisation, management and control of the school, held accountable to the employing authority or Board of Governors, expected to offer leadership to their school, and are prescribed a heroic plethora of duties. The introduction of the Local Management of Schools policy in 1991 encouraged the delegation of financial and managerial responsibilities to Boards of Governors. The devolution of some responsibilities to senior and middle managers in schools followed, with management allowances given for strategic, curricular and pastoral duties, and teaching allowances for team leadership, and curriculum and professional development duties.

It is critical to note that the Northern Ireland school system has endured nearly forty years of conflict while serving children characterised by high levels of poverty and deprivation and poor standards of health and health care. There are now strong expectations that schools will become major agents for societal and economic reconstruction, and that their leaders will ensure that students are given the knowledge, skills and attitudes they need to be successful in a modern knowledge society. Hence, in 2006, the Education (Northern Ireland) Order provided the legislative framework for major reforms, including curriculum, school admissions, special education, staff screening, extending schooling into neighbourhood renewal, and the deployment of ICT. At the same time, student demographics require a major down scaling of education services, and this could lead to a new approach of area-based planning, and devolution to schools or clusters of schools. The rationalisation of governance and administrative structures in education will also have to comply with the Reform of Public Administration policy, which came into effect from April 2008 to formalise the relationships between schools and their governing bodies and employing authorities. Further, the new Performance Review and Staff Development (PRSD) scheme requires Boards of Governors to evaluate the success or significant improvements achieved by their principals in regard to pupil progress, strategic leadership and management, as specified in each school development plan.

To assist, new National Standards for Headteachers in Northern Ireland were adopted in 2005. They were derived from the English National Standards, contextualised for Northern Ireland, and defined six key areas of competency as Shaping the Future, Leading Learning and Teaching, Developing Self and Working with Others, Managing the Organisation, Securing Accountability, and Strengthening Community. The Standards are now pervasive in that they (a) provide a common language regarding leadership performance, (b) are applied in the PRSD process, (c) serve as generic job descriptions for school leaders, (d) act as the basis for ongoing professional development

of aspirant and serving headteachers, (e) constitute the framework for self-evaluation by school leaders at a personal and whole school level, (f) determine threshold levels of performance for the assessment of middle and senior managers preparing for headships, and (g) offer criteria for the award of the Professional Qualification for Headship in Northern Ireland PQH(NI).

While the PQH(NI) is not a mandatory requirement for appointment to principalship, those with it (or with an equivalent university postgraduate degree) are much more likely to win such appointments, and those without the qualification appointed to first time principalships are entitled to enrolment. Additional criteria for appointment regarded as essential have been the length of experience in other leadership posts, particularly vice-principalships, and an appointee must hold a teaching qualification. The three routes through the PQH(NI) are complex, tightly structured and make heavy use of 'twilight seminars', serving or recently retired principals as tutors and skills assessors, and school-based projects for skills development and assessment. Self-financing is not an option. The blended nature of the programme, that includes supported study, personal tutoring, extensive face-to-face training and compulsory use of an online Virtual Learning Environment, is apparently unique to Northern Ireland.

Having been appointed, vice-principals and principals are entitled to attend induction programmes planned jointly between the Regional Training Unit and the employing authorities and delivered through RTU's Leadership College. The year-long induction programmes feature individual reflection, discussion groups, case studies, role plays, simulation exercises, online conferencing and information services, and in-school visits by support staff. At the end of the induction course, participants who do not already hold the PQH(NI) are encouraged to apply for entry.

In sum, it appears that education system leaders in Northern Ireland are being expected to enable their schools to prepare students for the reconstruction of the economy and the transformation of society, and in turn, that school leaders are being expected to reconstruct and transform their schools. The induction and preparation of school leaders, however, appears to rely on the transmission of 'best practice' from current and retired headteachers during the PQH(NI) programme to enable participants to acquire the basic competencies of the National Standards, rather than demonstrate transformational outcomes. This preparatory process also appears to be disconnected from research and development in universities, that is, the scholarly processes of testing and refining current knowledge, creating and applying new understandings, and capacity building in research and strategic leadership. It is notable that the assumptive base of Northern Ireland's policy documents, regarding the key conceptual relationships between school improvement, professional development and school leadership, is not provided. In the interim, the general outcome of the current leadership development strategy in Northern Ireland could be favouring the reproduction of schools rather than their reconstruction and transformation as required by national policy. On the other hand, strategic planning for the continued improvement of school leadership may be taken up by the newly established Education and Skills Authority.

Ireland's *Background Report* (2007) noted that, while the country has benefitted from an economic turn round in the last decade, its sustainability will depend on wage moderation, reducing poverty, managing significant immigration, and improving educational achievement. Indeed, "without a radical change in education and training policies, Ireland will have an under-supply of third level graduates and fierce competition among the low skilled for fewer jobs" (p. 8). The radical change required is to provide the population with the skills and high levels of scientific and mathematical literacy to ensure successful lives in a knowledge economy. The government and its social partners agreed, in the *Towards 2006: Ten-year Framework Social Partnership Agreement*

2006-2016 (Department of the Taoiseach, 2006), the government and its social partners agreed national plans for development, changes in practice and policy implementation, especially in schooling. *The Statement of Strategy 2005-2007* (Department of Education and Science - Ireland, 2005), and many other DES policy documents since, have taken up the *Towards 2016* agenda and articulated the nature of major reforms in a range of areas, by engaging representatives of national stakeholders, the three main teachers unions and the two professional associations of school leaders in these national policy processes.

Policy making in the system is therefore highly centralised and quite prescriptive, and leaves limited degrees of policy discretion and most of the management of implementation to the owners, governors and managers of schools (Department of Education and Science - Ireland, 2007). The leadership role of the principal is relatively recent to the DES policy documents, initially as a wider, more visionary aspect of managing a school (Leadership Development for Schools, 2003). The traditional approach was to specify school leadership roles in terms of responsibilities and duties, and then, to elaborate competencies (knowledge and skills required to fulfil responsibilities and duties). It is only relatively recently that DES policy documents have engaged with the concept of shared or distributed leadership in schools, although they continue to stress the importance of devolved responsibilities and accountabilities to local governance and management with respect to funding, curriculum and school organisation, referring to the guidelines negotiated between stakeholders at the centre.

The human resource information systems related to leadership appear to be at an early stage of development. While there are increasing concerns about the relatively low level of interest in the position of school principal, in contrast to the interest in other promoted positions within schools, there is no evidence being collected regarding the nature and dynamics of the leadership workforce; key attractors, turnover, retirements, attrition, retention, or support needs. Further, the *Background Report* indicated no evidence of doubts about the quality of leadership, despite the scale and nature of the reforms proposed. In sharp contrast, the same *Report* also noted many sources of concern over school leadership development: the international research and policy discourse on school leadership and leadership development related to school improvement, recognition of the significance of school leadership for pupil learning outcomes, the growing perception of the lack of attractiveness of the role of school leader, and acknowledgement of the increasing challenges attached to the role. It appears that the DES adopted a rationale for the development of programmes for training and professional development of school leaders on the basis of acknowledging the "indirect positive influence of leadership on pupil learning through the direct influence on school organisation, culture and climate" (p. 52), although it was less clear how this rationale underpinned the system's working theories of leadership, leadership development and school improvement and its provision of infrastructure.

The absence of a coherent national policy of leadership development is reflected in the plethora of providers and provisions. From 2001, the DES funded short-course professional development opportunities through the Leadership Development for Schools initiative for newly appointed principals, experienced principals and deputy principals, newly appointed deputy principals, and more recently, for teachers holding posts of responsibility. Other DES professional development initiatives have been intended to improve the quality of school planning. Newly appointed principals also gain access to management training through a range of private providers at primary and post-primary levels. The two professional associations for principals provide annual conferences, invited speakers, and on-line and mentoring support services. The teacher unions offer professional

development services for school leaders. Universities offer post-graduate diploma, masters and doctoral programmes in educational leadership, and although participation is self-funded, some support is available from employers and graduation can result in increments to salary. While applicants for secondary principalships increasingly have masters degrees and prior leadership experience, and all must have a teaching qualification and five years experience as a teacher, the majority of newly appointed primary principals reportedly have no relevant leadership training or study prior to appointment (Morgan & Sugrue, 2005). The *Background Report* observed that there was a “need to articulate a rich national understanding of school leadership as a construct that is agreed by all stakeholders in the system” (p. 53).

There appear to be at least four relatively unique strengths of the Irish approach to the development of educational leadership (p. 61): close coherence between a national social contract regarding economic and social development and the reform agenda for education and the transformation role for educational leaders; the access that leading practitioners and professional associations have to education policy development and implementation; the plethora of providers and provisions ensuring multiple preparatory and developmental pathways and opportunities for the refinement of leadership theories and practice; and, the development of the schools inspectorate with a focus on ‘whole school’ evaluation that encourages collaborative planning and leadership in a context of system research, development and improvement. The more significant weaknesses of current policy on school leadership include (a) the lack of workforce data and succession planning, (b) the devolution of responsibility to school level without adequate analysis and support, especially to the many small primary schools with teaching principals, (c) confusion over governance and management roles while implementing system policy; and (d) the seemingly open-ended nature of the role of the principal without parameters, specific contracts and conditions of employment.

The most immediate policy challenge identified was the need to create a shared understanding of school leadership as the basis for system policy making and implementation and thus for preparatory and ongoing professional development programmes. A related challenge recognised was the impact of the devolution of responsibility to school level at a time when volunteerism is under threat. A third challenge noted was sustaining the supply and quality of applicants, building a leadership information system and selection criteria and processes that respond to the increasingly multi-cultural nature of Irish society. The fourth challenge was to review assigned management/leadership roles, administrative responsibilities and teacher leader services to better supporting day-to-day management systems in schools. The fifth challenge accepted was to reconcile shared understandings of leadership with the extent to which leadership training should be generic or specific to particular school contexts. Finally, it was acknowledged that leadership policy had to evolve as part of the fundamental changes being expected throughout the education system.

West European States

While the concept of ‘freedom’ is fundamental to current policy discourse in Dutch education, the OECD *Background Report* (Bal & Jong, 2007) also stressed that national ideas about leadership development are ambiguous. On one hand, the concept of school leader is regarded as a “key function” that “steers and supports personnel and work processes in a school” (p. 79) and this conceptualisation appears to assume that the quality of education and school leadership are strongly connected. On the other hand, unlike the official concept of teaching, there is no legislation concerning school leadership duties, functions, authority, required qualifications, quality assurance or competencies. Nor is there a national policy that relates leadership development to school improvement. Under a policy rubric of ‘freedom,’ The Netherlands relies on school boards of

governors and their school leaders to self-regulate their services, largely in collaboration with the Nederlandse Schoolleiders Academie (NSA). At the same time, however, the government has been seeking economies of scale to match demographic trends and rising costs - by rationalising schools and decentralising management functions (e.g. personnel policy, accommodation, ICT, block-grant finance and accountability) alongside the longstanding local responsibilities for school style, teaching methods and curriculum content. School leaders are increasingly being held internally and externally accountable for aggregated student learning outcomes and for quality assurance through the induction and coaching of new teachers, and job and teacher evaluations.

There are puzzling aspects in the management and development of the leadership workforce; there are no shortages of applicants from teachers for leadership in secondary education yet there have been unfilled vacancies in primary school leadership for some years. There has been a proliferation of entities offering education, training and tailor-made courses for school leaders based on the requirements of governing boards or managers and participants. Providers include the Higher Vocational Education, intermediaries of trade unions such as the General Association of School leaders, national pedagogical centres, Centre for Innovation in Education, trade unions and commercial training institutes. The length of training can range from one-day courses to two to three years part-time training and study that articulates into a university masters degree. One explanation of this diversity is that the subsidies offered since 1994 by the Ministry of Education, Culture and Science were unaccompanied by policy or prescription; sector stakeholders and providers determine the nature and content of provisions.

It appears that there is, as yet, no national policy settlement in Holland on what constitutes school leadership and how leadership development is to relate to school improvement and system capacity building. Indeed, leadership preparation is no longer compulsory. Leaders do not have to be trained teachers. Instead, The Netherlands relies on the capacity of professional self-regulation orchestrated by the NSA to develop and guarantee the learning of appropriate knowledge, skills and attitudes, and to assure the supply of quality applicants for leadership roles. The Background Report illustrates the point:

“the NSA tests all product and services for the management of primary education in primary education as to their quality (certification based on NSA quality standards). In addition to describing and assessing training the NSA also keeps up to date the Register of Educational Directors (RDO). The purpose of the register is to ensure the professional quality of those registered and to promote their professional development” (Bal & Jong, 2007, p. 74).

A series of innovations have emerged in The Netherlands regarding the professionalisation of leadership. First is the creation of ‘knowledge circles’ / knowledge centres and networks that aim to disseminate research and the experience of schools to wider target groups. Second, a Dutch version of ‘co-coaching’ based on the English ‘Partners in Leadership’ model has brought educational and business leaders together to reflect on practices to mutual benefit. Third is ‘orientation training’ in management functions for participants nominated by boards and school leaders that are aware of regional workforce needs. Fourth are ‘leadership nurseries’ in institutions encouraged by the Ministry to prepare teachers and potential school leaders from other sectors in a specific leadership function, such as large school management, pedagogic leadership, or in the core competencies of nominated roles. Fifth is ‘tailor-made training’ that meets the requirements of governing boards, managers and participants. Sixth is embedding pedagogical leadership in initial teacher training.

The *Background Report* predicted five persistent policy dilemmas, some in tension, and offered two recommendations. The pressure on secondary school leaders will continue to intensify in the coming years. The development, registration and coaching of school leaders will be reinforced in order to advance the professionalisation of leadership. Teachers and politicians will press for even greater autonomy for schools from The Hague. The NSA, other stakeholders and professional associations, will all seek to further improve the quality of school leaders. The two recommendations were that teachers be allowed to continue to progress to management functions, and that the growing accountability of schools could have undesirable side-effects such as risk avoidance cultures and an increase in the internal bureaucracy in institutions.

The *Background Report* for Flanders (Devos & Tuytens, 2006) explained that Belgium is a federal state with three levels of government: the central State, the Regions (the Flemish Region, the Walloon Region and the Brussels Capital Region) and the communities (the Dutch-speaking Flemish Community, the French-speaking Community and the German-speaking Community). Flanders is the largest Belgian Community with 58 per cent of the total population. It is densely populated and highly urbanised. It has combined the governance powers of the Flemish Region and Community and created a Flemish government, with its capital in Brussels.

The constitution allocates Education to the Communities in Belgium. The Flemish Ministry of Education is minimally involved in the organisation of schooling and only provides final attainment levels for students, a legal framework for schooling, and funding for teachers salaries. The principle of 'freedom of education' is interpreted as giving every person or entity the right to establish and organise a school. It is also interpreted as empowering parents and students with the right to choose the school they prefer, and since state funding follows, this sustains inter-school competition.

There are three networks of Flemish schools and educational services. Nearly 70 per cent of students attend state-subsidised 'private schools' founded by individuals or associations. The majority of these schools are linked to the Catholic Church and their school board areas cohere with Catholic dioceses. There are a small number of Protestant schools and schools with unique educational philosophies, such as Steiner or Freinet. About 17 per cent of students attend state-subsidised 'public-sector schools' governed by municipal or provincial authorities. Religious and ideological neutrality is required. The local authorities act as school boards and are grouped under two umbrella bodies: the Flemish Towns and Municipalities Education Secretariat, and, Provincial Education Flanders. About 14 per cent of students attend 'community schools' provided by the Flemish Community government. Religious and ideological neutrality is also required. In community schools, policy-making power is held by groups of schools (comprising a maximum 50 schools), which act as school boards. At the central level, these groups of schools are represented by the Community Education Board.

School boards are devolved most governance and operational powers. Boards in all networks are highly autonomous and determine their own curricula, regulations, educational methods, and personnel policies. Board members can be volunteers elected by parents or professionals paid by the networks. The schools in an area may be governed by different school boards, which can duplicate structures and prevent cooperation between schools. Headteachers are supervised by their school board, and their status, position, job description, selection, and training varies according to the education network they work in.

There are no standardised tests of learning outcomes in primary or secondary education in Flanders. School inspections are formative and reports are written in a way that prevents inter-school comparisons. Mean student achievement scores locate Flanders in the group of highest

performing countries for each subject area, yet have a very wide distribution. There is no systematic evaluation of teaching or school leadership and headteachers are not held accountable for student performance.

On the other hand, headteachers are increasingly being held responsible for monitoring, evaluating and improving teacher performance, although without training. Their selection criteria and process tend to be informal, internal, do not expect advanced leadership training or education, and does not offer a salary that compares with other leadership roles in the wider labour market. The processes tend to perpetuate a tradition of headteacher autonomy, and in secondary schools, do not appear to obtain strongly participative and professionally-oriented leadership services.

The *Background Report* concluded that school leadership in Flanders was characterised by considerable freedom yet low role clarity, growing expectations regarding school development without testing, increased political complexity and stress, growing interest in professional development and certification, growing interest in the selection and headhunting of leaders, increasing attention to middle management contributions to school leadership, the need to professionalise school boards, and the development of 'school communities' in secondary education.

The development of 'school communities' in Flanders was the subject of a follow up OECD case study (Day, Møller, Nusche & Pont, 2007). The government's objectives for these 'voluntary collaborative partnerships' between schools were "to enhance student guidance systems, lessen the managerial-administrative burden on headteachers to allow more focus on pedagogical leadership, increase the use of ICT, and rationalise resources through collaboration on staff recruitment and course supply" (p. 2). The OECD team came to the view that the objectives and conceptualisation of 'communities of schools' in Flanders cohered with its working definition of school leadership for systemic improvement, that is, where principals work together across schools and can act as leaders of schools as learning organisations. On the other hand, it also felt that:

the government did not provide strategic leadership, educational vision, or a theory of action to guide the development of the communities of schools. The Flemish authorities initiated the development of communities of schools, but they did not further influence the development process or outputs. This hands-off policy has resulted in a lack of clarity about the purpose of communities in terms of school leadership and organisational culture. At the levels of the schooling networks, school boards, communities, and individual schools, there are many different understandings of the nature and purpose of school communities. As a consequence, there is a diverse landscape of various types of school communities with different degrees of cooperation. Some issues and key tensions may need to be resolved if communities of schools is to be sustained (p. 19).

They advised the Flanders Ministry of Education to consider (a) sustaining communities of schools through active management, leadership and stakeholder ownership, (b) improving school quality and equity by promoting the adoption of new teaching and learning strategies, (c) moving away from choice and competition and towards cooperation, (d) bridging from the old to the new structures with planned transfers of roles, responsibilities and powers, (e) providing leadership training and support to develop capacities crucial to the development of communities of schools, and (f) enabling the sharing of evidence-based reflections in communities of schools to define and disseminate good practices.

Spain's *Background Report* (Spanish Ministry of Education and Science, 2007) explained that five models of school leadership have evolved since the beginning of 20th century. A non-

professional model was evident when the system designated school leaders with no prior training or profile. This was replaced by a professional model from 1945 up until the *General Law on Education* (1970) which recognised the role of head teacher, yet without specifying training. The third was a non-professional political model of school leaders being elected by teachers' assemblies. The fourth was a non-professional socio-political model introduced by the Organic Law Regulating the Right to Education of 1985 whereby school leaders, potentially with no prior leadership experience, were elected by their School Council. The most recent is a professional socio-political model where School Councils select (and re-select and terminate) using legally determined criteria and processes that include preparatory training, matching experience to a job profile, performance reports, proposed school plans, and offering extended terms of office and incentives.

The national policy debate regarding school leadership currently focuses on effective management and democratic decision making.

"The debate is, on the one hand, between granting broader powers to school leaders to enable them to put school autonomy into practice and limiting their powers so that the other sectors of the educational community can participate; and, on the other, between converting school leaders into democratically elected management professionals, not from teaching, and accepting school leadership as a temporary assignment of governance tasks to teachers. The recently approved Organic Law on Education (LOE) has devised an intermediate formula between both and at the same time reinforces school autonomy" (p. 5).

The latest model and the current debate reflect the transformation of Spain in the last two decades, due to political democratisation and joining the European Union, although mediated to accommodate the constitutional guarantees given to the largely autonomous communities that make up Spain. There has been, nevertheless, major investment in education intended improve the quality of education, attract and retain students, provide training for future employment and personal development, and respond to growing student diversity due to immigration. In this decentralised context, reforms in each school tend to share five aims: develop the school council to strengthen a culture of participation and community control; promote school autonomy; develop pedagogical and curricular projects which take into account the needs of the community and the users; restore assessment and evaluation methods that consider outcomes, educational processes and stakeholders; and, promoting school leadership that is attentive to the demands of the community, users and the labour market, encourages participation and promotes a community education model.

Hence, there have been three broad trends in school leadership in recent times. It has moved from directly appointed school leaders to electing leaders, from selecting leaders from within the school to the possibility of bringing in leaders from outside, and from selecting administrative leaders to considering the selection of policymakers and pedagogical leaders. Although there is little evidence that individual schools have initiated general innovations linked to school leadership, a number of autonomous communities have introduced quality assurance, school certification, school development programmes (strategic planning, school self-evaluation, community projects, setting up school networks, IT for schools, etc.), centralised school autonomy issues, created knowledge management networks, and generated proposals for funding innovations.

School leaders, therefore, may have considerable influence in their schools, particularly through leadership in curricular, pedagogical, resource management, assessment and evaluation areas while implementing the Council-approved school plan. There is no tradition or practical

experience in public accountability in schools, apart from the School Council's review of school performance and the results of any internal and external evaluations. There is relatively little preparation for school leadership. Appointees are required to attend induction training provided by the education authority, and then to serve for a fixed term of four years. Additional terms of four years are possible, if their performance evaluations are positive and the Council is convinced by their proposed school plan. If there are no candidates, the authority may appoint a 'civil servant state teacher' as the head teacher for a maximum of four years.

School leadership training is at an early stage of development in Spain. Apart from the preparatory training courses leading to the certification required for appointment, several education authorities, universities and other institutions have designed and provided a variety of different training programmes and initiatives. Their content and approach tend to reflect a few role studies, recent challenges and the priorities of education authorities. Professional associations established over the past decades and the European Forum on Educational Administration continue to provide annual meetings, study visits, publications, awards for research and the dissemination of best practices.

In this context, national policy discourse related to school leadership development is dominated by four socio-political questions. Should school leaders be elected or selected? Should school leaders teach as well as lead? Should head teachers be appointed from within or from outside the school? Should head teachers be appointed for a fixed term or be given tenure? Each of these questions signals continuing doubts over the coherence between the national purposes of education and the model of school governance, and the absence of a national policy that conceptualises the nature of school leadership and links it to 'school improvement' and 'leadership development'. In the interim, the Spanish Ministry of Education and Science (2007) have provided five recommendations that virtually stand as national policy on leadership development: (i) develop a model of participative leadership reflecting degrees of school autonomy and favouring contextualised, non-standardised leadership; (ii) open up the selection of school leaders to professionals from other schools; (iii) provide formal positions of authority for the school leaders who have been elected and to allow them to form their own teams with teachers from the school; (iv) guarantee leadership stability without unlimited tenure and retain periodic performance evaluation; (v) improve school leadership through professional development that focuses more on educational leadership than management technique.

In Portugal, a 'school leader' is defined as the elected President of the Executive Council of a single school or a group of schools, reflecting the centrality of democracy in the narrative of the nation since the Revolution of the 25 April 1974. The *Background Report* (Ministry of Education - Portugal, 2007) also explained how the context of democratic leadership had changed significantly since 1986 when Portugal joined the European Community, now the European Union. The education system has undergone continuous transformation since with heavy investment from national and European sources, enabling much higher participation rates at all levels of education. Immigration has risen and the population has aged. There have also been adjustments to the legislative and regulatory framework intended to open school management up to more public scrutiny and accountability through increased participation of local council, community and parents' representatives on school planning committees, and by "the mandatory requirement for strategic management plans; the school educational project, the school and class curricular project, and the annual programme of school activities. This has created space for the implementation of audit programmes, for internal and external inspections based on checking the implementation of standards and for mechanisms

to ensure accountability” (p. 5).

Another layer of government was added between the Ministry of Education and the Executive Councils of schools between 1998 and 2003. The national Plan for the Autonomy, Administration and Management of Schools enabled municipalities to create local education councils which initiated socio-educational support services, extra-curricula activities and school transport networks. In 2003 they were renamed Municipal Education Councils and given additional powers, responsibilities and formal constitutions. They now coordinate local educational policy, propose action for educational stakeholders and social partners and propose changes considered necessary to improve performance. They also serve as agents of the Ministry, by regulating the functioning of the system, and manage investment into pre-school, compulsory and adult education, while managing educational, social and cultural support services and facilities. This development overlaid the implementation of the new Organic Law approved by Portugal’s Ministry of Education in 2002, and the associated regulations for central and regional services issued in 2004, which attempted to reconcile the idea of developing schools as autonomous and democratic centres of learning with the implementation of national educational goals, essentially by encouraging local projects. The *Background Report* noted that the reason for the persistent structural ambiguities is that “successive governments have faced the dilemma of wishing to promote decentralisation, reduce costs and obtain efficiency gains, while at the same time not wanting to relinquish the advantages of centralisation through the progressive modernisation of the mechanisms of management, monitoring and assessment” (p. 21).

National policy discourse in Portugal favours the development of effective leadership that is able to manage the changes necessary for organisational improvement in schools, despite the absence of research into effective implementation and the tradition of local democratic policy making in curriculum design, pedagogical organisation and human and financial resource management. This helps explain why demand for training in the area of school leadership is relatively limited and recent, although provisions were expanded significantly in the 1990s, along with the late appearance of research and postgraduate study opportunities, the weak legal and formal standing of those elected to leadership, and the absence of permanent career pathways for leaders. The teachers elected as presidents of school executive councils tend to be experienced teachers in senior and middle management positions, presumably with the political competence to organise and sustain electoral support. There is little training available for administrative and management functions in schools; appointees mostly learn on the job. The available training and postgraduate education is varied and eclectic in terms of models and techniques. There is no national strategy that relates higher learning to the professional development of school leaders, no research base that might inform the professionalisation of middle and senior managers or school leaders, nor overall accountability by school leaders and teachers for the learning achieved in schools and for the efficient use of resources.

Portugal’s *Background Report* (p. 41) concluded that the current challenges of school leadership can only be addressed effectively by new national policies in four areas: (i) revising the general principles and objectives of the State’s administrative role, especially in correcting inequalities in the distribution of resources; (ii) promoting decentralisation to transfer responsibilities and resources to municipalities for the provision and local regulation of educational services, (iii) guaranteeing effective organisational autonomy of the school within the context of its functional multi-dependencies and political multi-regulation (state, local authority, stakeholders and internal community), and (iv) advancing the qualifications of school leaders, the professionalisation of teachers and other educationalists, and consolidating student and parent participation.

Scandinavia

In Norway, Møller and Schratz (2008) found that powerful teacher unions had campaigned against the development of university-based preparation programmes for school leaders and any forms of professional leadership that might seek to influence teachers' classroom practices. Since the school owners, that is, municipalities and counties, are responsible for leader competence and leadership preparation and development, the results include intense competition between them, universities and private providers, and diverse offerings. There are no national requirements concerning leadership standards, qualifications or moderation of preparatory or in-service provisions. The Network for School Leadership in universities and colleges was established in 1998 and funded by the Ministry of Education and Research. While it has provided in-service training and masters degree programmes in educational leadership, it is not regarded as part of a coherent national strategy.

The reason, as explained by the OECD *Background Report* for Norway (Hegtun & Ottesen, 2007), is that although there is a national policy framework for education, common law and national strategies and priorities in primary, lower secondary and upper secondary education and training, the school owners at municipality and county level, including private school owners, are responsible for how this is managed and carried out within each school. There is, therefore, great diversity in priorities and management systems, relatively little data collected on a common basis that enables national analyses, and continuing resistance by teachers to participating in research and to the development of a national leadership development strategy.

The situation appears unlikely to change quickly. There are a large number of small and geographically isolated schools in Norway that require decentralised governance. The principals of state primary and lower secondary schools report directly either to a chief municipal education officer or to the chief municipal executive, depending on the size of the municipal authority. Some municipalities have set up governing boards as the highest body at each school with the principal as employer representative, representatives from all affected parties, and external representatives/local politicians. Upper secondary school principals report to the Head of the Education Department in their county authority that serves a politically elected county council. These governance structures focus primarily on budgeting and financial management, and where a principal reports to a governing board or education official, the reporting can extend to include salary payments, staff appointments, personnel work, and the continuing education of the staff. There has been little attention given in any of these governance structures to student achievement or to the quality of teaching. A decade after the OECD's PIMMS and PISA data had initiated a national debate on student achievement, "a joint national inspection programme in 2006 showed that more than 70 per cent of schools in the sample did not have systematic school assessment and reporting routines in place and thus, lacked a system to safeguard pupils' rights" (Hegtun & Ottesen, p. 7).

The OECD *Background Report* also showed that Norway has no overview of leader recruitment data, vacancies, prior qualifications, prior teacher training or experience, role enactment data, leadership career paths or the requirements and support provided by local school owners. It also showed that the national education policy initiative, the Knowledge Promotion Reform, had increased awareness of the need for a coherent educational leadership development strategy. It confirmed, however, that the role of educational leaders might play in national education reform is contested by three parties: the Norwegian Association of Local and Regional Authorities, the teachers' unions, and the national government. It was recommended (p. 8) that responsibilities be clarified to pave the way for "collaboration between school owners and the state authorities on

school leadership training”, the former’s interests being addressed by content in the areas of “law, human resources administration and economy” and the latter’s by “clear expectations of the school leader regarding education policy priorities”. In sum, Hegtun and Otteson recommended “clear and powerful” leadership in schools “as advocated in the Knowledge Promotion Reform” by reconciling the priorities of local, regional and national educational governance in the public interest.

Møller and Schratz (2008) found the situation to be broadly similar in Denmark with some exceptions. There are neither national guidelines nor formal preparatory requirements for school leaders. There are no nationally accredited postgraduate or in-service training programmes for school leaders. “There seemed to be a consensus for many years that leadership didn’t require any education exceeding the teachers’ training and some years of teaching and schooling practice” (p. 355). As in Norway, there are programmes offered by municipalities and universities but there is no national direction provided. In this policy vacuum, the teachers’ unions have developed a ‘codex for school leadership’ which could yet be developed into standards. Some municipalities offer newly appointed leaders management courses and mentors.

The *Background Report* for Denmark (Pluss Leadership A/S & Molin, 2007) confirmed that the highly decentralised degree of school governance and the lack of research made it very difficult to provide a national and data-based perspective on educational leadership. There is no national management of the supply of headteachers. There are no national leadership performance standards or selection criteria or processes. Boards of governors select from applicants using their own criteria and there are no plans to change this process. More broadly, there has been a general trend since 1989 toward more systematic evaluation of student learning and the evidence-based development of teaching, initially in vocational schools, then upper secondary and more recently in lower secondary and primary schools, urgently requiring leadership services that can develop a professional culture of evaluation and innovation.

Appointees today experience a range of working and employment conditions. Some are offered mentoring support. The *Background Report* explained that, in 2006, 96 per cent of municipal primary and lower secondary school headteachers were found to have participated in a four-week preparatory course, with 16 per cent going on to complete a diploma or master’s degree in educational leadership. In the same year, the Ministry of Education, the Danish Ministry of Finance and the Association of County Councils in Denmark established a working committee to review training initiatives for municipal primary and lower secondary school headteachers. The national professional association, Danmarks Skolelederforening, proposed that municipal employers offer three phases of training. Phase One, immediately on appointment as a head teacher, was proposed to include an in-house induction to municipal and school management systems, mentoring, the Danmarks Skolelederforening three-day tools course, headteacher training at Den Kommunale Højskole, and an individual skills development plan in connection with the annual staff appraisal. Phase Two, in-service training within the first five years of employment, was proposed to include a diploma degree in leadership or other relevant course at diploma level. Phase Three, over the entire employment period, was proposed to include internal municipal interdisciplinary leadership training, participation in relevant conferences, networks, etc., and education to master’s level. The national government is currently planning a mandatory diploma course in school leadership.

Denmark’s *Background Report* concluded that the establishment of self-governing schools in the 1980s had achieved many advances regarding the relationships between boards of governors, school leaders, teachers, and students. This vision of decentralisation, however, was now under pressure due to an absence of parental choice regarding schools in rural areas, competition created

by school differentiation in urban areas, and growing demand for more systematic evaluation systems, leadership education and training, and evidence-based clarity over effective educational leadership. It was predicted that Denmark's school leadership development strategy would keep shifting towards enabling headteachers to provide (a) strategic leadership, (b) organisation development, (c) leadership, motivation and learning, and (d) operational management, along with simple, non-bureaucratic process and result measurements which support teaching and learning in schools.

In sharp contrast, the Swedish National Agency in Education has long provided training courses for school leaders. Since 1992 it has commissioned eight universities to deliver increasingly sophisticated leadership programmes, with follow up evaluations, and funds for the participants' tuition costs. Employing municipalities usually meet the costs of travel, subsistence, 10 per cent relief cover and study materials. After the 2006 general election, the new national government announced a mandatory school leadership programme for all principals appointed after 2007, to be governed by the National Agency and delivered by universities at postgraduate level.

The reasons are clarified in the Swedish *Background Report* prepared for the OECD by the National Agency for School Improvement (2007). The partial decentralisation of governance from central government to local municipalities during the 1990s was intended to (a) encourage greater innovation and flexibility in the system, (b) stimulate local democracy, (c) reduce spending across the public sector, (d) promote increased efficiency by introducing more market forces in education, and (e) enable competent municipalities to manage their own affairs during a severe economic recession. At the same time, the national government retained overall responsibility for defining national objectives and guidelines for education and curriculum. And since each municipality remained responsible for determining how its schools were to be run, they have commonly required their school leaders to consult with teachers and stakeholders and develop a school work plan that uses management-by-objectives to describe the resourcing, organisation, development and evaluation of school activities. Hence, while the state sets the central aims for schools, schools are held responsible by the municipal authority for the educational process and resources used to achieve the general objectives in their school work plan. Teachers have considerable freedom to determine teaching methods and select teaching materials appropriate for state curricula that prescribe compulsory subjects, subject syllabuses and curricular aims.

Two national agencies assist, independent of the central government and municipalities. The National Agency for Education evaluates and reports to the Government and Parliament on policy compliance and on the rights of individual students, as the basis of a national development plan for schools. The National Agency for School Improvement supports and encourages municipalities and schools to achieve the national objectives and to improve quality in priority areas, including the professional development of principals and teachers. The net result claimed is that the overall school system remains goal-oriented and achievement-oriented.

State funds are distributed by formula in a lump sum to municipalities and then to schools. Teacher recruitment and salaries are managed at school level by school leaders, in consultation with the teacher unions, within nationally negotiated industrial awards. The two teachers' unions negotiate salaries and other working conditions with the Swedish Association of Local Authorities and Regions (SALAR). The Swedish Association of Principals and Directors of Education (including Deputy Principals) represents leaders in parallel negotiations with SALAR, in the belief that "teachers and school leaders play different roles in the school system. The view of this union is that school leader work is a specific profession with certain interests and should therefore be handled in a certain organisation" (p. 15).

Sweden's *Background Report* noted that a former weakness (low demands and lack of competencies on evaluation and follow-up of school results) has been rectified by the introduction of continuous evaluation, public accountability and discussion, participation in international comparative evaluations of educational systems, national evaluations, the routine use of national testing in several school subjects, many types of evaluations being used to identify weaknesses, and follow up improvement initiatives. Conversely, the 'goal and result-based steering model' use has, in general, not built inter-school or 'system leadership' capacity. On the other hand, it was noted that the Swedish system has comparatively good material resources, well trained and competent teachers, and excellent links with other caring professionals and other support personnel that sustain the learning environment. It has also transformed large schools, sometimes with more than 1000 students and a staff of more than 100 people, into smaller units, often half the size, to combat anonymity. The rationale provided was that "the school leader is the utmost protector of children's right in a school and, therefore, it is of great importance that he or she can be available for the students. Smaller units make it easier to fulfil the important aims concerning participation and co-responsibility from students and staff" (p. 45). It was noted that 'deliberative dialogues' between students and teachers, and between school leaders and teachers, have become a strength of the system in the last decade.

Two weaknesses of Sweden's administrative systems noted were the year-long basis for budgeting and municipalities reclaiming unspent monies, which together discouraged longer-term planning. Another is that support for the professional development of school leaders can vary due to the municipal economy, resulting in calls for more uniform national investment. A third weakness is that businesses are becoming less willing to host students for the compulsory experiential components of vocational curricula, apparently due to growing job complexity and safety requirements. A fourth and persistent weakness is the minimal level of educational and school management research. "The employers have to understand that a full time working school leader or a teacher has very little energy left for doctoral studies or to conduct research in their spare time. This kind of study needs to be looked upon in the same way as, for instance, in the sector of health care, where research is considered as an important investment to improve quality in the organisation and as a natural part of the professional work" (p. 47).

A strength claimed is the growing legitimacy of having school leaders decide the salaries of teachers and other staff, due to the process being based on "internal rich communications" and "reliable knowledge" of "results and actual contributions" (p. 46). Another is the increasing number of appointments of administrative specialists to assist schools, such as financial managers, developers and evaluators, helping school leaders to focus on pedagogical and pastoral leadership. A third is the sustained interest by school leaders in learning networks that use 'critical friends' in order to get feedback and continuously improve competencies and the quality of their schools. The fourth strength noted is the extent to which the school leaders' union serves as a professional association, providing professional information and debates on the ethical and normative dilemmas of leadership. A related outcome is that school leaders contribute significant social capital to the wider society, through sporting, children's rights and charitable organisations. A fifth strength noted is the openness of the Swedish system to ideas from other countries and to European and international research sources. This openness is encouraged by the professional networks encouraged in municipalities, by the coaching, supervision and problem-solving infrastructure they provide at regular meetings, and the opportunities provided to refocus their contribution when they are ready for an alternative to school leadership. "In many municipalities, school leaders are used for long term strategic work or for evaluations when they have conducted [completed] an intensive

period at a school. It gives the school leaders a feeling of safety to know that these options are available when the energy might ebb away" (p. 47).

Finland has a similar set of structures and challenges, a remarkable record of student achievement and an emergent leadership development policy. In its *Background Report* to the OECD, the Finnish Ministry of Education (2007) explained that school leadership is generally conceived in primary schools as the responsibility of principals and vice-principals, and in secondary and vocational education, as including heads of department and training managers. Educational leadership is even more broadly conceived to include municipal educational administrators such as directors of educational departments, directors of educational and cultural services, heads of general education divisions and development managers, and as traversing general administrative leadership tasks in municipal educational and cultural administration. In many small municipalities, a school principal, in addition to being the director of the educational department, can also administer tasks of other sector's directors, such as the director of cultural services, the director of sports services, etc.

The reason for these broader definitions is that the municipalities in Finland provide basic services for citizens in social and health care, education and culture, environment and technical infrastructure. The definitions can be expected to be further extended. Foreshadowed reforms will aim at further strengthening service production and structures, improve productivity, curb costs and develop better 'steering' or policy implementation systems. Included here will be the integration of different levels of schooling into comprehensive services, reassignment of facilities, reconciliation of professional working conditions, conversion of inter-school competition into cooperative networking across municipalities, exploitation of ICT for educational purposes, meeting parents' rising expectations, and managing a 50 per cent turnover of principals in the next six to eight years.

School governance is provided through a municipal democratic system, with some minor differences between municipalities regarding the delegation of teaching and staffing responsibilities. There are no general systems for the evaluation of learning, teaching or school leadership, although most providers run their own self-developed systems for diagnostic and formative purposes. Schools have a high degree of autonomy over teaching methods. There is a high degree of public trust given to high-standard teacher education, principal training and continuing professional education in schools. Principals are held responsible for the functioning of their schools by law, by the national goals of education and lesson distribution, and by the national core curriculum and ordinance issued by the National Board of Education. School-specific and municipality-specific curricula can be designed by schools and by education providers.

In this context, principals are expected to consult and assemble a practical school work plan that reflects municipal and state expectations and available resources. They have significant influence on the selection and leadership of personnel, within the terms of collective agreements, and tend to 'steer' their schools through collaborative strategic planning, financial administration, and formative evaluation. To illustrate, when new legislation in 2003 required schools to integrate comprehensive child and youth welfare into their provision of safe learning environments, principals coordinated the local implementation of the policies. In so doing, they related the principles of early intervention, preventive action and integrated services to child and youth development.

Finnish principals teach for a minimum of two hours per week up to a maximum of 22 hours per week, as determined by their employer. They are also expected to evaluate teacher performance according to provider-approved criteria, typically consisting of mastery of the profession, pupil

performance, renewal capability and the ability to cooperate with colleagues. In some schools, teaching excellence can be rewarded with a bonus, and in all schools, sanctioning is limited to cases of serious neglect. There is no information available nationally on the performance of principals, vacancies in principal positions or the number and competence of applicants. What is known is that the total number of basic education principals dropped by 15 per cent between 2002 and 2005, while the number of upper secondary principals fell by 4 per cent in the same period. This was most probably due to contracting student numbers and the closure and merging of schools. Since a principal's appointment comes with lifetime tenure, and long-term service in the role is apparently the norm, this rationalisation inevitably involved reassignments into other municipal roles.

Although exact numbers are not available, large numbers of educators apparently prepare for school leadership roles using the highly affordable Specialist Qualification in Management (JET). It is delivered out-of-work hours over 2-2½ years using institutional and apprenticeship learning modes. The patterns of participation suggest that sponsoring municipalities see JET more as effective generic preparation for managers in any field of municipal administration rather than as customised leadership training for principals *per se*. Aspirants for school leadership also know that they must satisfy the Qualification Decree either by passing the examination for the certificate in educational administration (12 ECTS credits), completing university studies in educational administration (25 ECTS credits), or convincing employers that they have 'adequate familiarity' with educational administration. There are concerns in the Ministry over the quality of the first route given variances in provisions and quality assurance.

There are also significant differences between the programmes offered by universities in Finland, although most include school legislation, administration, leadership coaching, finance, educational policy, leadership in education, evaluation of education, and interaction and communication, and include the syllabus for the certificate in educational administration. These studies are offered through part-time and flexible learning modes, and typically comprise lectures, teamwork, learning assignments, literature reviews, online work, with visits to schools and meetings with school leaders possible. They usually take up to 18 months to complete and course tutors usually come from different university departments, although some school leaders and experts from educational administration are engaged. The scale of this system is modest; between 50–80 aspirants enter these programmes annually, although the effectiveness of the programmes is monitored, through client feedback and university quality systems.

Support and induction programmes for newly-appointed school leaders and their participation vary a great deal. Most appointees have to make their own arrangements or self-finance training. Some gain access to educational institutions where the leaders are provided with induction, mentoring, peer support and degree-targeted further and continuing professional education free of charge. Some education providers provide free induction programmes for new school leaders, along with continuing professional education and training for municipal educational administration.

Continuing professional education in school leadership has many providers, including the National Centre for Professional Development in Education (OPEKO), consulting companies, university continuing education centres and employers' in-house training programmes. For example, OPEKO launched an annual continuing professional education programme for about 200 newly appointed principals in 2007. The content integrates personal development, school leadership and community development, as determined by the Finnish National Board of Education, and results in (a) customised plans for the continuing development of professional competence, (b) a long-term communal development process in each school community, and (c) ongoing mentoring

and professional networks (pp. 44-45). The course is free to the participants and the employers compensate their schools for teacher substitute, travel and accommodation costs.

Post-graduate education in educational leadership has been developing steadily in recent years. The Institute of Educational Leadership established in 1999 at the University of Jyväskylä launched a 35-ECTS study programme in 2000 that was designed for practitioners wanting to develop their competence through practical leadership training based on university research. The Institute also planned to launch a Master's degree in 2007. There are also doctoral research programmes at the Institute and at the University of Helsinki with about 20 specialising in educational leadership graduating by 2007.

Finland was selected for case study by the OECD as a highly successful example of a systemic approach to distributing school leadership. The review team (Hargreaves, Halász & Pont, 2007) met with Ministry leaders, national stakeholders and providers, leaders in two municipalities and the leadership teams, staff and students in two schools over three days. The systemic challenge focused on was how Finland proposes to improve schooling in its united school system, despite the context of declining school enrolments and resources. The national governance strategy is to articulate a national vision of schooling and to expect municipalities to develop their own approaches to school leadership distribution and cooperation. The municipal governance strategy is to reiterate the national vision and expect principals to be responsible for their district's schools, and to share management, supervision, evaluation and planning in their own school.

The success of this approach, as indicated by comparatively high levels of student achievement, was attributed to a number of sources. First is the high status of teaching, an all-Masters profession, especially the central role it is given to "build a wider social mission of economic prosperity, cultural creativity and social justice that is central to the Finnish identity" (p. 11). This means that the Finnish public education strategy cannot be replicated or disaggregated into components because it integrates with a unique suite of cultural and social values, an inimitable blend of social and economic structures, and a distinct approach to educational reform that is embedded in a national narrative of aspiration, struggle and destiny as a welfare-based knowledge society. Second, the National Board of Education draws on research evidence and provides a framework of educational policies and objectives that is used (a) by teams of highly qualified teachers to write curriculum at municipality level, (b) by municipalities to prepare 'balanced scorecard' strategic plans, and (c) by school communities to prepare annual work plans. This means that there is a high degree of vertical and horizontal coherence and cooperation in policy making and implementation systems. Third, Finland does without individual testing or measurement-driven accountability, does not partition time for the teaching of these subjects and does not download structured reading and mathematics programmes to younger age groups to enhance skill development. This suggests that Finland's leadership in the world in student learning performance in reading and mathematics can be attributed instead to a conceptualisation, commitment to and widespread culture of learning both in school and in society. The case study came to three conclusions that will be controversial in Australasian settings:

Learning rather than measured performance defines the focus and the form of systemic leadership in Finnish education. Learning and teaching are valued throughout schools and society, learning starts early but is unhurried and untested, and learning is broad and lifelong rather than concentrated on test preparation. Teacher quality and performance are addressed by establishing the appropriate conditions to attract high level professionals through good working conditions, clear purpose, status,

autonomy and reward. Improvement of schools that employ these highly capable and trusted professionals is achieved by processes of self-evaluation within learning organisations that are allocated national and local government resources so they can solve problems for themselves. System leadership, in this sense, is leadership for learning, leadership by learning and leadership as learning – not leadership for performance and testing (p. 16).

Through these relationships of responsibility, cooperation and trust, Finland exhibits a pattern of systemic leadership in strong cultures of lateral and vertical teamwork, networking, participation, target setting and self-evaluation. Hierarchies are not feared, and interventions (as compared to cooperative problem solving) are virtually unknown. There are signs that cooperation may not yet have fully developed into more rigorous and challenging processes of collaboration focused more closely on teaching and learning. This could prove problematic if Finland's system is placed under stress. But for now, high performing Finland rests on a culture of high-trust, actively engaged and cooperative professional relationships.

These conclusions were accompanied by some contradictions. While the informal approach to distributed leadership remains dominant, it is being supplemented by more formal systems of teamwork and decision making which are being designed and led by principals to deal with new challenges. Principals are being expected to become much more than a peer contributor to a 'society of experts'. They are expected to be responsible for budget allocations, compliance with legislation, HRM and HRD, strategic planning, action plans, target setting, teamwork, team building, external liaison with parents and municipal authorities. They are also being expected to manage cooperation with other schools to share resources, down-scale resource allocations due to falling enrolments, give increased attention to special educational needs, integrate educational with health and social service provisions, manage quality assurance through self-evaluation and auditing, and sustain teaching contributions as well as increased leadership responsibilities.

These expectations are creating role overload that is being exasperated by a 'growing crisis' of generational leadership succession triggered by four factors: demographic turnover, falling attractiveness of leadership roles, insufficient incentives, and inadequate training and support. Seven solutions were suggested; work longer and harder, lighten the leadership role, improve training and support, increase the strength of leadership roles, redistribute within school leadership, improve pay incentives, and develop systemic, cross-school leadership.

It is, however, not clear how sustainable these solutions are in the longer term. It appears to be widely recognised in Finland that the sustainability of high performance in the education system is becoming increasingly vulnerable to the combined effects of structural changes in four areas: (i) retiring 'baby boomers' undermining the financial viability of the welfare state, requiring the rationalisation of public services (i.e. cost reduction, resource sharing and service integration), (ii) rural emigration to the cities reducing the cost-effectiveness of municipalities, requiring them to rationalise curriculum offerings, school provision and related leadership responsibilities, (iii) increased immigration from the European Union increasing demand for special education services and greater coordination of education with health and social service provisions in order to increase the taxpayer base of the welfare state, and (iv) the challenges of leadership succession requiring leadership recruitment, continuity and renewal. The general strategy adopted in education in Finland, to address this vulnerability, is municipal reform intended to redistribute school leadership at several levels and in different directions.

The basic redistribution involves nominating some school principals to serve as district heads for about one third of their time while continuing to devote the rest of their time to their own schools. The municipality distributes municipal authority when it allocates leadership functions to district heads that coordinate various district level functions, such as planning, development or evaluation. The district heads join a municipal leadership team that works as a group to share and collectively solve problems. The district heads distribute their leadership knowledge, skills, experiences and attitudes between their own schools and others, between institutional levels and across functions, such as the coordination or curriculum planning, professional development or special needs provision in their area. The leadership of the larger schools, also led by the district heads, is redistributed internally between the principal and other staff, releasing the principal for other area-based responsibilities and accelerating leadership capacity building within the school.

There were some signs reported that suggest that the redistribution is having positive systemic effects. New forms of interdependencies are being created at institutional and district level through intensified processes of interaction, communication and collective learning, enabling systemic leadership to improve its problem solving capacities. The focus of leadership attention is shifting away from the school unit to systems of schooling, with boundaries between and within entities becoming more permeable and flexible. Stronger mutual interdependencies and interactions are enabling networking that creates improvements across complex systems, such as integrating services as a way of accommodating more diverse populations. The systemic networks are enhancing a culture of trust, cooperation and responsibility in the pursuit of increased effectiveness and greater equity. Greater resource and power transparency is creating a moral imperative to rationalise more effectively in a financially challenged welfare state and to search for greater curriculum coherence and more responsive learning pathways. The emergent leadership capacities of district heads are creating a fresh form of engagement in, and strategic contribution to, municipal and national planning. The redistribution of leadership services within schools, enabled by the appointment of vice principals, is boosting leadership capacity building in teacher teams. Overall, developing leadership capacity and attending to succession and stability is beginning to increase the density of, and opportunities for, local leadership in the school and municipality.

The OECD case study team recommended that Finland develop a clear national strategy for leadership development and succession, extend municipal leadership to include pedagogy and support experimental projects, and redeploy current principals nearing retirement as coaches and mentors. They also recommended that schools each create an evidence base through diagnostic testing so that the management of learning, given their increasingly diverse student bodies, can make professional decisions on more than intuition and interaction. More generally, they recommended that Finland reflect critically on its educational and economic success so that others can learn from their experience and apply the ideas elsewhere wisely.

In making these recommendations, the OECD team argued against the uncritical adoption or rejection, either in part or in whole, of the Finnish model. Instead they noted that:

The municipality's and the nation's approach to and success in systemic leadership and improvement in education is significant precisely because it demonstrates the importance of connecting educational to societal improvements across multiple, and internally consistent as well as integrated frames of concern and action – moral, cultural, political, structural-technical, learning-related and leadership-oriented. It is this ethical and organisational commitment and consistency within a coherent system that appears to be an essential and broadly transferable lesson of systemic educational reform within Finland and its municipalities (p. 31).

They recommended that other countries or settings interested in systemic improvement through leadership development consider 12 related dimensions:

1. The need for a broad and inspiring social and educational mission, rather than vague visionary or achievement gap statements;
2. Focusing quality assurance of professionalism on the entry points, with the emphasis on status, rewards and mission;
3. Enabling professional capacity building by rationalising demands in terms of the pace, scope and intrusiveness of external initiatives;
4. Basing ongoing quality assurance of professionalism on the development of professional and social responsibilities, rather than on bureaucratic and market driven forms of accountability;
5. Developing political and professional leadership that can build trust and cooperation as a basis for improvement;
6. Building leadership capacity through professional networks and district cooperation that is committed to the welfare and learning of children and citizens;
7. Narrowing inequalities of opportunity and achievement by integrating strong principles of social justice into systemic leadership of systems of school communities;
8. Devolving sufficient core responsibilities to the district level so that lateral leadership and cooperation become professional rather than administrative tasks;
9. Building the capacity for team leadership within schools;
10. Focusing on improving teaching and learning (curriculum and pedagogy) as the route to improving student learning outcomes, rather than employing expensive and extensive systems of high-stakes testing;
11. Integrating business principles in educational reform and in the development of knowledge societies; and
12. Reconciling them with the principles of strong and inclusive social states (pp. 32-33).

The German-speaking Countries in Central Europe

The federal states of Germany have each developed training provisions and qualifications for school leaders in their own in-service training institutions to support state reform initiatives, with the result that there are very few university programmes in educational management or leadership. In Switzerland, the cantons have traditionally sponsored a range of pre-service and in-service training provisions, some jointly with the Swiss Teachers Association. Early this century, they transformed their non-academic teacher education institutions into institutions of higher learning and gave them responsibility for developing advanced courses for school leaders.

Austria has long had six-week part-time management courses for newly appointed school heads that are today delivered through regional institutions, as in Switzerland. In Austria's *Background Report*, Schratz and Petzold (2007) noted a longstanding weakness in policies in school leadership development - the diffusion of authority between central, regional and local levels, hindering effective leadership action at any one level. Five solutions are currently being trialled by the Austrian Ministry of Education, Science and Culture. The first is a vertical redistribution of responsibilities, that is, moving many administrative functions to the system's regional structures enabling school leadership could focus more on professional reforms. The second is a horizontal redistribution of responsibilities, moving many professional leadership functions in schools from school leaders to team leaders, implying that leadership is being reconceived as a shared service function rather than the prerogative of an incumbent in a position of responsibility. The third is for

the Ministry to plan the implementation of major reforms in schools more carefully so that long-term solution-finding replaces short-term problem solving and coping behaviour. The fourth is to develop national quality assurance and improvement criteria and processes to enable the media to sustain informed debate about the effectiveness of schools. The fifth is to introduce mandatory education and training in leadership and to institutionalise the professionalisation of leaders at all levels of the education system through the online Leadership Academy (LEA).

An OECD case study of Austria's LEA (Stoll, Moorman & Rahm, 2007) showed that it is attempting to professionalise all 6,500 school leaders and other executives in leadership positions in the Austrian school system as quickly as possible using scientific findings on innovation and change. Each annual 'generation' of 250 to 300 participants joining the LEA come from all provinces and school types, as well as from the Ministry and regional education authorities. The process begins with four three-day Forums comprising keynote presentations with group processing and work in learning partnerships between paired participants and in collegial team coaching (CTC) groups, each comprising three pairs. Each participant develops and implements a project in his or her own institution over the course of the year. Learning partners and CTCs meet regionally between Forums and also come together with other participants in regional networks. Participants are rigorously assessed during the year's programme and those that successfully complete the full training and assessment process are certified and admitted into the graduate ranks of the Leadership Academy. There, LEA alumni play important roles mentoring subsequent candidates and supporting the networking of groups. The driving philosophy is about creating a learning context aiming to influence the patterns and habits of professionals in leading positions with regard to their capacity of developing and transforming their organisations. The LEA is supported by project management, research and administrative teams and regional networks drawn from universities and the Ministry of Education.

Four 'generations' totalling 1,015 school leaders have completed the LEA since 2004 with another generation of 259 starting the programme in December 2007. Stoll, Moorman and Rahm (2007) noted five criticisms of the LEA initiative: (i) its implementation by a Minister 'from the side' needlessly violated bureaucratic norms, (ii) it has not been fully coordinated with other national reform initiatives, (iii) it cut across traditional national power structures in education, (iv) it does not appear to be part of a coherent overall national agenda for education reform, and (v) it has no permanent structure or organisational home. On the other hand, they also found that the initiative exemplifies adaptive change principles and has achieved strong support across stakeholder groups. They recommended three changes to assist with implementation: give school leaders the authority to choose or change their school's teaching staff, reduce the administrative load by reallocating new administrative and managerial duties, and amend leader selection criteria to give greater priority to pedagogical leadership. The key challenge identified was one of sustainability, expressed as six questions. Will it promote the depth of change necessary for the changing educational landscape? Will its alumni maintain and be supported to maintain an ongoing involvement with its ideals and practices? Will a critical mass of leaders, including key Ministry leaders, be reached, and will ideas spread across regions and other leaders, including teacher leaders? Will the programme leaders involve sufficient others of high quality to help build their capacity for delivery and facilitate a very large and growing programme? Will the LEA be integrated into national leadership frameworks and with other related initiatives? Finally, will the necessary changes occur to system structures as part of a coherent national change strategy?

In sum, the Austrian online LEA initiative offers many innovative options to Australasian systems, given their complex mixes of centralised and decentralised governance and management

structures, compounded in Australia by immense geographic distances. An attractive feature of the LEA is that it was developed thoughtfully using “interactive theories of action about effective learning-centred leadership, about effective learning of leadership learning, and, implicitly, about effective systems change” (p. 5).

Eastern European States

The generally decentralised approach to the implementation of reforms in Eastern Europe after 1989 tended to allocate much more power to principals, yet often without commensurate capacity building and support. The rapid yet locally mediated adoption of the many ‘Western’ models offered by consultants and by international, governmental and non-governmental organisations led to plural outcomes. This has led to the professionalisation of leadership in the Czech Republic, Hungary, Bulgaria and Slovenia, the institutionalisation of professional development of school leaders through partnerships between Ministries and universities, and an increasing incidence of innovative practices informed by international partnerships within EU initiatives.

Hungary’s *Background Report* (PMRC, 2007) is salutary. The current challenges for school leadership in their highly decentralised system include efficiency (the contracting birth rate has intensified competition and become the main school rationalisation strategy), increasing sensitivity (yet slow response) to comparatively poor student achievement data, poor teacher career opportunities and low motivation, the urgent need for technological and pedagogical innovation in foreign language learning and ICT, the shifts in development-political priorities due to joining the EU, and with that, continuous and quick changes in the legal environment.

The school ‘maintainers’ in Hungary, mostly local governments, use a wide range of criteria and processes to select school leaders. Neither previous leadership experience nor qualifications in educational leadership are prerequisites for appointment although mandatory preparation has been foreshadowed from 2015. There are no support or induction programmes for appointees. The system lacks leader, school and teacher evaluation systems. The flat structures in schools require leaders to persuade teachers to take up middle management roles, create regional support networks and make the best use of the in-service teacher development training system, which mandates 120 lessons to complete every seven years. Competencies, performance standards and salary incentives for teachers and leaders are being considered.

In the interim, the *Background Report* on Hungary recommended a range of reforms to school leadership: selection criteria stressing ‘professional fit’, public leadership capacities in addition to pedagogical expertise, collaborative forms of team leadership, openness for change, ability to inspire networking, and engagement with international leadership experiences and research. Notably, Hungary provides two-year masters programmes for aspirant public leaders in higher education institutes, along with a few short-term programmes and courses in school management and leadership issues.

Bulgaria took a different route to designing preparatory programmes for principals in response to broadly similar circumstances. The policy choice it faced was either to adapt and develop the traditional provisions or to train trainers in the models used in West European countries. With the assistance of the Netherlands School for Educational Management (NSO), Bulgaria decided to combine the two approaches. The collaboration resulted in a master of education programme on educational management launched in 2002 and delivered by a group of specialists from five Bulgarian universities and the National Institute of Public Education (NIPE).

The process began with a national needs analysis conference of stakeholders and a successful submission of an aid project proposal to the Dutch Ministry of Foreign Affairs. The project started

with the selection of staff from the participating universities and a three-week full-time intensive training programme in Amsterdam comprising a basic programme on educational management and specialisation programmes for groups of two or three responsible for the construction of course modules back in Bulgaria. Each module had a teacher's component, a student component, and a background literature of theory. An inter-university institute was then formed by the participating universities and the National Institute for Public Education to organise, deliver and assure the quality of the program, with accreditation using an international panel of experts. Unanticipated demand subsequently required the engagement of 50 additional trainers from the universities.

An ISPP case study of the collaboration (Karstanje & Webber, 2008) noted that the major dilemmas encountered were attended to by (a) exposing participants to different teaching and learning approaches and giving them the opportunity to experience and reflect on them, (b) expecting them to practise, receive feedback, and discuss experiences with each other, (c) having participants construct their own lessons and write background literature to boost ownership, (d) selecting the right people and starting with train-the-trainers programmes as early as possible, and (e) implementing new ideas carefully, allowing for incubation and letting participants decide on the feasibility of an innovation.

Slovenia gained independence from the Socialist Federal Republic of Yugoslavia in 1991. Since then, it has sought to establish democratic institutions, enshrine respect for basic human rights and fundamental freedoms in community affairs and develop a market economy. It has stabilised inflation, increased wages and employment, mobilised capital investment and modernised its taxation system (Koren, 2007). In the same period, Slovenia has designed a new policy and legal framework for education, refinanced public education, and reorganised the governance, management and curriculum of elementary and upper secondary schools. The values and core principles forming the basis for 'the renewal' in education are evident in structures and practices: accessibility and transparency of the public education system; legal neutrality; choice at all levels; democracy, autonomy and equal opportunities; and the quality of learning to take precedence over the accumulation of facts. To illustrate, Slovenia's *Organization and Financing of Education Act* determines that pre-school institutions and schools are to be governed and managed by four entities working in concert: an elected council (with a balance of power between parents', teachers', community and owners' representatives), the head teacher, the professional/ academic assembly, and the parents' council elected from each level of learning.

The actual impact of restructuring and reform initiatives on practices in schools and student learning are not known in detail due to the general absence of empirical evidence. While some role studies informed the development of a mandatory one-year certificate and licensure programme offered by the National School for Leadership in Education, they do not provide a basis for further policy development concerning leadership development. In this regard, a number of challenges for the Ministry of Education and Sports and school leadership development have been identified: the need to rationalise provisions to match falling student demographics; the need to revise purposes, structures, accountabilities and capacity building in system leadership; quality assessment and assurance based on the principle of institutional self-evaluation with external support from professional institutions; and, system transparency to enable more objective judgements about the degree to which schools are effective.

Elementary school head teachers and upper secondary school directors are given considerable discretion over staffing, resources, elective curricula, organisation, quality assurance and external relations. They are also held responsible for the leadership and management of their schools.

They report to their councils, Ministry inspectors and officials (p. 22), submitting an annual school plan and reporting on enrolments, learning, finances and professional development. Their public accountabilities, including the equity of outcomes, are reinforced by external examinations at the end of elementary schooling, and again at end of secondary general and technical professional schooling, and by the winning of places in higher levels of education. School leaders face growing concerns regarding school effectiveness and efficiency due to changing societal aspirations, in particular regarding the significance of science and technology education in gaining economic competitive advantages and ICT innovations. They are also expected to engage their schools in Ministry projects and programmes intended to promote pedagogical leadership, such as The Network of Learning Schools, Quality Assurance and Assessment, and Mentoring for Newly Appointed Head Teachers, and projects funded by European Structural Funds.

A School Council is legally obliged by Slovenia's *Education Act* to consider the views of internal and external stakeholders, use defined criteria and follow particular procedures prior to appointing a head teacher or director for a fixed five-year term, with the possibility of re-appointment or dismissing them. They allow the appointee to appoint their own deputy. They may appoint a head teacher without the head teacher's certificate but must oblige the appointee to complete it within a year. Their appointee must be a qualified teacher and mentored, advised or counselled in the role for at least five years. Other training and education programmes provided by universities and National Education Board are considered optional. Their head teacher or director fully responsible for the leadership of a school, for legal compliance and must implement the tasks and duties assigned by the School Council that are in accordance with the legislation, including decisions about complaints of employees or parents. On the other hand, actual practices suggest that "it is difficult to claim that head teachers are held accountable for student performance" (p. 29), and in some areas, schools must present school plans and reports to local communities and to regional units of Board of Education.

Future policy development regarding school leadership will probably focus on strengthening learning-centred leadership, with head teachers and directors assisting with data collection. There is regular public benchmarking of salaries and there are currently few concerns about the supply, retention or quality of licensed applicants for leadership positions. The ongoing rationalisation of schools due to falling student numbers in some areas is establishing more clusters of upper secondary schools with one leader and centralised administration without undue controversy. The professional development needs of leaders appear to be met by a range of opportunities: mentoring, seminars, international and national projects, a national journal on leadership in education, annual conferences, self-evaluation manuals and active professional associations of primary head teachers and upper secondary directors. On the other hand, the professional association of upper secondary directors have been campaigning to mandate the status of the school leaders, life-time tenure, legal officers for schools, more professional development for school leaders, greater differentiation between the salaries of school leaders and teachers, salary supplements for efficiencies, and changes to the school leader's appointment procedure.

Current policies on school leadership reportedly have the following strengths: the differences between pedagogical leadership and management are apparently clear in the Slovenian language; the *Education Act* clarifies how responsibilities are to be addressed in a way that meets the needs of the environment and ensures equity and quality of educational provision; the license training provided to aspirants by the National School for Leadership in Education is held to be highly relevant by appointees; and, the five-year term appointment appears to be delivering quality assurance

and stimulating the constant improvement of schools (pp. 56-57). On the other hand, the current policies on school leadership appear to have three major weaknesses: distributed leadership is not encouraged in most schools, project managers of innovations have ambiguous authority, and head teachers tend to emphasise managerial responsibilities with far less time given to learning-centred leadership. The trends and changes anticipated in future policies regarding leadership development include a greater use of empirical data and simultaneous movements towards increased school autonomy, accountability and transparency. The Ministry is expected to seek greater school effectiveness, system efficiencies, industrial flexibility and the rationalisation of provisions. This may lead to integrated budgets, contracting-out some services and more networking and operational partnerships between schools and between schools and companies. The main challenge anticipated is how to sustain educational leadership in a context of such active school and system management.

African, Middle Eastern, Asian and Small Island States

While the situation regarding school leadership preparation and development in Africa is far less researched and reported than in Europe, and the context significantly more turbulent, general patterns and dilemmas are evident (Otunga, Serem & Kindiki, 2008). The structures of education systems today reflect histories of colonisation, political and economic developments since liberation, and cultural variations by region. For example, the three Anglophone countries of South Africa, Nigeria and Kenya have very different leadership preparation provisions. In South Africa, in the midst of post-Apartheid reconstruction, the principals of schools are being expected to deliver radical change largely with negligible preparation and resources. Nigeria has virtually no processes to prepare and develop school leadership. Kenya has developed a range of providers and provisions, although like Tanzania, is at an early stage of development.

An ISPP review of Kenyan and Tanzanian principal preparatory programmes (Onguko, Abdalla & Webber, 2008) considered participants, content, structure, providers, delivery modes, credentials, and pedagogy. The findings were instructive: pre-service and in-service education and training for principals was lagging significantly behind the rapid development of primary and secondary schooling; provisions for system officials, aspirant principals and team leaders were virtually non-existent; the programme content stressed management, legal and leadership issues over pedagogical, ICT and visioning issues; and, face-to-face short courses leading to a certificate were the most common delivery systems. Strikingly absent from the content of most providers, in view of the HIV/AIDS epidemic, was guidance and counselling. Most programmes examined also did not address monitoring or evaluation, encourage reflective practice or consider gender and student leadership issues.

Otunga, Serem and Kindiki (2008) also reported similarly diverse sets of providers and provisions in the Francophone countries of Senegal, Congo and Rwanda, reflecting each country's natural resources, political and cultural history and education structures. Dilemmas confronted by most school leaders in most African countries include the rapid growth in school-age populations, rural to urban migration swamping schooling services, falling public expenditure on education, the inaccessibility of parents, a culture of violence and post-traumatic stress disorders, the poor health status of students, cultural diversity and gender disparities, and in the absence of support, having to learn leadership on the job. Hence their conclusion that leadership research and training in Africa should focus on the dilemmas faced by leaders in context using distributed learning systems supported by partnerships of international agencies and government ministries, universities and professional organisations.

The preparation and development of leaders in the Middle East has also been shown (Macpherson & Tofighian, 2008) to reflect a locally unique and complex patchwork of cultures and political histories, in this case featuring recurrent conquest and colonisation, periods of peace and *jihadism*, sudden oil wealth and modernisation, and societal reconciliation and economic development. The relatively common heritage of Islamic schooling across the region, and a pragmatic leadership ideology that stresses reciprocal relationships, are shown to have been mediated differently in each country's education system. In general, there has been a shift underway from traditional to modern forms of Islamism through self-managed degrees of Westernisation. Most countries expect their aspirant school leaders to 'learn on the job', participate in Ministry-delivered training on appointment as a school leader, and then to sustain their learning of leadership through higher learning in regional universities. As with the reviews of European and African countries noted above, it was recommended that each Middle Eastern country reconcile Western ideas about school leadership with local challenges and dilemmas by blending indigenous and evidence-based concepts of practice and theories about how best to improve learning outcomes.

Walker, Chen and Qian's (2008) review of leader development in three Chinese societies, in the People's Republic of China (China), Taiwan and Hong Kong Special Administrative Region (HKSAR), found that they commonly reflect international, national and local dimensions of cultural, economic, political, religious and social subtleties, the radically reformist nature of educational policies, as well as the structural dynamics of increased decentralisation and accountability. For example, China introduced a mandatory training scheme for newly-appointed principals in 1998 that was intended to implement new policy concerning the quality of schools. The scheme required 300 contact hours prior to or within six months of being appointed. Serving principals were directed to complete 240 contact hours over a five year period. Training content was tightly prescribed by contact hours and delivered by local training institutions. From 2000, one thousand 'Backbone Principals' were selected annually to participate in a national month-long programmes at one of two leading normal universities. Unlike earlier and other training courses which comprised lectures, the Backbone Programme used lectures, interactions with Ministry officials, experts and professors, encouraged peer discussions, and organised school visits and set writing tasks. Given the very limited number of places available, the selection outcomes favouring high-profile elite schools and the high degree of state control over content, the programme has been criticised as elitist.

Taiwan offers government-subsidised pre-service training to aspirant principals who satisfy a range of service and performance criteria, and pass an entry examination. Districts then provide the training and examinations that cover prescribed content such as professional literacy, gender equity and multi-cultural awareness. Successful completion qualifies aspirants to apply for designated principal's positions when they become available, with few subsequent in-service training requirements. To meet growing demand by unqualified aspirants, alternative nine-month part-time principal 'cultivation' programmes were offered by universities and principals' centres attached to tertiary institutions from 2001. Fixed content delivered by lectures usually includes vision building, strategic piloting, and effective administration, curriculum development, building a friendly school, resource integration, and campus construction and pioneering. Learning, theory and reflection on practice are integrated through development planning exercises, problem-based learning, case analyses, mentoring, as well as peer discussions of issues and experiences. Other leadership learning opportunities are offered online, by seminars and at conferences by non-government agencies such as professional associations.

The Chief Executive of the KHSAR announced in 1999, that, in the future, all newly appointed principals would need to satisfy requirements prior to appointment. After two consultative papers, the framework formally adopted in 2002 had 'Key Qualities' or standards that were stated as clusters of values, knowledge, skills and attributes, in six core areas: strategic direction and policy environment; teaching, learning and curriculum; leader and teacher growth and development; staff and resource management; quality assurance and management; and external communication and connection. Aspiring principals were required to attain Certification for Principalship (CFP) prior to being considered for appointment. Newly appointed principals (NAPs) in their first two years were required to engage in designated continuing professional development related to their own needs and their schools' needs, and to present a professional portfolio to their governing boards each year. Serving principals in the role for more than two years were required to sustain at least 150 hours contact in continuing professional development over each three year cycle, using three modes: structured learning, action learning and service to education and the community. The staged introduction and preliminary evaluation of CFP and NAP programmes suggests that they were providing professional and psychological support, increased contextualisation and multi-layered communities of practice.

The common features found at systemic level in China, Taiwan and HKSAR, by Walker, Chen and Qian (2008), were the extent to which leader development policies are being driven by broader socio-political and globalised influences, with degrees of incoherence between the goals of societal reform and the aims of leader development programmes. At the policy level, frameworks for leadership development have been elaborated in terms of structure, prescribed time and content, formal certification by the government or through university tenders, and differentiating between levels of principalship but not leadership. At the provision level, the issues are increased access by aspirants to pre-appointment programmes, the significant degree to which indigenous knowledge and social processes are employed, the slowly widening range of teaching and training methods employed, and the uneven commitment to evaluation and research into leadership development strategies.

Three conclusions were drawn (pp. 428-430). First, while recent policy in all three Chinese societies has highlighted the importance of leader development, and tightened formal structural requirements, the structural rigidity could overshadow the reason for leadership development. This draws attention to the real purpose of leadership development and the effect expected in the classroom. Second, leader development policy and activity remain deeply rooted in ordered social relationships and connections. This points to how engrained cultural traditions might be used to further understand leader identities, create learning opportunities for leaders and promote educational reforms in Chinese societies. Third, school leaders' views of what constitutes effective leader development and what they could bring to the process have not been considered. This indicates the need for research into what educational leaders in Chinese societies believe they need to improve in their leadership services and what they could contribute to leadership learning.

Leadership development in small island states typically occurs in a context of geographic isolation, economic vulnerability, limited higher education provisions, diversity within and between states, and, in developing countries, limited resources (Bush, Purvis & Barallon, 2008). Succession strategies tend to rely on self-nomination and/or centrally determined criteria and intimate processes that tend to reproduce leadership characteristics. Most small states have no formal preparatory requirements, although the Seychelles and Malta both require postgraduate specialist qualifications, with practitioners tending to favour apprenticeship models. Similarly, most have no

induction or mentoring arrangements for appointees, although the practitioners researched in the Seychelles and Malta saw this as a weakness.

In most of the small states that were also developing countries, limited resources tended to be focused on delivering in-service training to implement national reforms and address generic needs in context. Bush, Purvis and Barallon drew three conclusions. First, the commonly constrained resource base for leadership development implies the need to focus on in-service preparation delivered by school principals in collaboration with government, external providers and donors. Second, this preparation should be customised to context and aim to develop leaders able to create successful schools. Third, empirical and comparative research projects should investigate leadership succession, preparation, selection, induction, and in-service development.

Analysis

Purpose-driven preparation

A feature of the findings above is that nations, and scholars of educational leadership, use a wide range of concepts and frameworks to describe leadership and to determine the most appropriate forms of preparation and continuing development. One approach is to examine the foundations of educational leadership, to clarify its fundamental nature and purposes, and from there determine the most appropriate forms of preparation and ongoing development (Begley, 2008). The meta-values of leadership in education have been shown to be about enabling educators and students to achieve the blend of purposes of education as prescribed by diverse national and system policies. Despite the variance in the national and regional cases reviewed above, the blend commonly included aesthetic or humanistic purposes, economic or vocational purposes, and ideological or socialisation purposes, and signalled the degree of radicalism in the reforms expected of leaders (Hodgkinson, 1993).

Since each educator and student also comes to education with prior perspectives, goals and webs of belief, the moral art of educational leadership is about understanding, influencing and reconciling personal, collective and organisational intentions, in particular those conceived as 'educational problems' and 'ethical dilemmas' in conditions of cultural diversity and political pluralism (Hodgkinson, 1991). The need for such philosophical leadership has been shown in Australian conditions to be a foundational component of 'educative leadership', that is, ethical leadership intended to sustain learning by students, educators and organisations (Duignan & Macpherson, 1993).

Begley (2008) and his international associates used this purposes-driven approach to suggest formal and informal preparation programmes that were 'cognitive apprenticeships' grounded on "a comprehensive image of effective leadership, the identification of key functions, and the promotion of reflective practice and critical deliberation by aspiring and incumbent school administrators" (p. 27). The study content they designed were regionally-specific role profiles presented as "two dimensional matrices that describe developmental stages of growth in professional performance within selected dimensions of professional practice" (*ibid*). It is interesting that common key dimensions of profiles that emerged internationally in the content of the preparatory programmes they developed were school culture management, instructional leadership and organisational management, although they could in part be an artefact of the methodology used.

Since none of the Australasian education systems appears to have clarified the fundamental values of their education systems in philosophically specific terms, it is difficult to evaluate the justifications that offer for their leadership development policies. On the other hand, reference might be made to the blend of philosophical purposes that underpin New Zealand's ten National

Education Goals (Ministry of Education New Zealand, 2007) or Australia's goal statement; the Adelaide Declaration on National Goals for Schooling in the Twenty-first Century (DEEWR, 2008), or their successors. This again highlights the value of higher learning that prepares educators for philosophical leadership, especially those charged with the articulation of national policy or institutional strategic plans.

Cultural leadership

This second approach to determining appropriate preparation focuses explicitly on school and system culture as both a primary medium and outcome of leadership, as exemplified by Victoria's, England's and Finland's approaches. Some of the challenges identified here (Lumby & Foskett, 2008) are the complexity of the term 'culture', the moving macro relationships between culture and globalisation, and the multiple micro relationships between culture and the identities and cultures of individuals and organisations. One consequence noted regarding the design of curriculum and delivery is a "cultural guessing game requiring those responsible for preparation and development to hold a high degree of cultural fluency themselves and to support the development of cultural fluency in others" (p. 53). It was argued that this 'guessing game' should proceed from current and local conceptualisations of leadership, recognise conditions of service and meta-values, and address the residual effects of colonisation and the suppression of indigenous cultures.

Appropriate preparation in such conditions of diversity, it followed, should aim to develop 'cultural fluency' in leaders so that they could "include the multiple cultures present", and "sustain, adapt and or change the dominant culture" (p. 56). This would require, it was concluded, "persistent efforts to increase the intercultural fluency of all involved, in part by increasing the evidence base, and in part through detailed translation of such evidence to impact the design and delivery of the development of leaders" (p. 57). In sum, this approach suggests that educational leaders' cultural competence can be indicated by their demonstrable capacity to sustain cultural safety in conditions of cultural diversity while transforming organisational cultures. This is not a new idea in the Australian context (Rizvi, Duignan & Macpherson, 1990).

This perspective is strongly represented in New Zealand's Kiwi Leadership for Principals (KLP) framework, and is prominently concerned with maintaining trusting and effective relationships and accommodating current cultural norms in school communities. The policy recognises the foundational status of the Treaty of Waitangi, yet awkwardly advances a solely bicultural posture in a patently multi-cultural nation, and then promotes skilful relationships and communications whereby "the principal leads thinking around how the school and community might work together to provide students with the best learning opportunities" (p. 15).

Hence, while clarifying the indicators of effective cultural leadership, including the need to "challenge and modify values and traditions which are not in students' best interests" (p. 18), it might be helpful for the PLS to be more explicit regarding the dilemmas of culturally transformative leadership in multicultural settings. And while the Australian *Background Report* did not discuss the implications of the special needs of indigenous peoples and the multi-ethnic composition of Australian society for a national policy regarding educational leadership development, Anderson, Kleinhenz, Mulford and Gurr (2008) did indicate the growing number of programmes addressing the diversity of leaders and targeting the needs of particular groups. Given the growing cultural diversity in Australia and New Zealand, multi-culturalism appears to be an adaptive challenge for education. Given the degree of political pluralism in both countries, and in most countries internationally, the virtual absence of political philosophy in educational administration appears to an adaptive challenge for the field of practice, theory and research.

Leadership of school improvement

A third approach of conceptualising leadership development is to focus on instructional leadership and organisational management, increasingly by examining the effects of leadership on student achievement. This approach was evident in all countries reviewed. A review of scholarship in this tradition (Jacobson & Bezzina, 2008) started with the Coleman Report which showed that, although schools contribute less to student outcomes than educators suppose, as compared to racial and socio-economic factors, some schools were performing well above expectations based on their demographics. While school effectiveness research then identified instructional leadership among other school characteristics as a key correlate of student achievement, it did not establish causation. School improvement research then focused on the processes used to change and improve schools, such as school self-evaluation and teacher ownership, although initially without a theoretical or practical link to student outcomes.

More recent school improvement research has used quantitative outcomes data and qualitative process data to explain variations in educational quality, and recommended the auditing of student experiences, classrooms and schools against aims, capacity building (through sophisticated training, coaching and staff development), medium-term strategic planning, incentive regimes, external support agencies, and deliberate cultural change through vision building and structural changes that support aspirations and embed school improvement (Leithwood, Day, Sammons, Harris & Hopkins, 2006).

This research tradition locates purposeful leadership as central to school improvement, reflecting a foundational assumption of all leadership development policies reviewed in the countries above. The tradition concentrates on the processes used by successful leaders to “focus on teaching and learning, capacity building, staff development and collective review, parental and community involvement, improving the learning environment, and a strong belief in students” (Jacobson & Bezzina, 2008, p. 87). It may be criticised for its unproven yet foundational assumption that “among school-related factors, leadership is second only to classroom instruction in contributing to what students learn” (p. 93), uneasy treatment of distributed leadership, fuzzy account of professionalism and as valuing an ethic of *puissance* – the ability to get things done. With regard to preparation, this ‘school improvement’ approach tends to assert that aspiring leaders be introduced to the “core practices of setting directions [visioning, group goals, performance expectations], developing people [intellectual stimulation, individual support and role models] and redesigning the organisation [culture, structures and collaborative processes]” (p. 98). Rarely is the seductive role of ego evoked to help control hubris and to differentiate positional authority from expertise. The tradition can too easily be seen as offering a ‘licence to practise’ without critical reflection.

New Zealand’s KLP adopted aspects of this assertive and uncritical tradition, declaiming that “principals work within four areas of practice to lead change and to solve problems in their schools: culture, pedagogy, systems, and partnerships and networks” (p. 18). The tradition might serve education better if it were to provisionally award a ‘lifetime learner’s licence’ with an ethic of critical reflection on practice. Looking ahead to the licensing policy of any PLS, it might be noted that this approach to ‘school improvement’ has been taken to require (a) at least two administrator internship placements with leaders with track records of improving student achievement, (b) at least one clinical placement in a challenging school where students are at the greatest risk of failure so that aspirants may study how core practices are mediated by context, (c) mentoring programmes linking middle and senior management to exemplary school leaders, and (d) consultancies for exemplary leaders in struggling schools (Jacobson & Bezzina, 2008). To be fair, many aspects of this critical

and reflective dimension to life-long professional leadership development were evident in Victoria's approach to school improvement through leadership development (Fraser & Petch, 2007) and in the strategies and implicit policies of Australian states, such as the NSW's *Professional Capability Framework* (Scott, 2003), and in the national standards framework for teaching (MCEETYA, 2003).

Socially-critical leadership

A fourth approach is to conceptualise leadership development as a socially critical strategy of challenging various forms of racism, sexism and social injustice in individuals' assumptions and practices, in student learning outcomes, in educational institutions and systems, and in wider host societies. This has been the driving political philosophy underpinning the Deakin University's educational leadership programme for decades (Bates, 1983, 2006) and is widely evident today in education policies that seek to give 'equity in outcomes' an equal weighting to 'quality'.

The international evidence concerning the appropriateness of this perspective in education is compelling. The under-representation of black and minority ethnic leaders in English and South African schools has been tentatively explained using qualitative data that indicate the persistence of a wide range of historical, cultural, social, personal, interpersonal and structural impediments to cultural and community integration and career advancement (Bush & Moloï, 2008). It appears that decentralised systems in England and South Africa typically identify school leaders by relying on aspirants to have the confidence to self-select against advertised criteria, and further, on informal role models and mentoring to create such confidence, thus contesting professional marginalisation and covert discrimination. Conversely, centralised systems tend instead to determine the processes and criteria for identification and selection in order to reduce the element of chance and smooth succession dynamics, although potentially shrouding structural discrimination and enabling cultural homogenisation.

Hence, Bush and Moloï (2008) recommended a preparatory policy and deliberate processes to ensure that leaders acquire role-specific knowledge, skills and confidence prior to appointment. Such policy, they argued, should address access to preparation, motivating participation, cultural safety during preparation, and customised learning. They also recommended proactive recruitment and selection policies and practices, such as local panels being representative of the community served by the school, and explicit systemic commitment to change and equal opportunities training for panels: "A major educative process is required to overcome deeply ingrained racial prejudice" (p. 116).

Similarly, it has been argued that leadership preparatory and succession policies and practices should help contest sexism (Coleman & Fitzgerald, 2008). The profile of many education systems' workforces reviewed above indicate the continuing under representation of women in leadership positions compared to their contribution to education in non-leadership roles. Many forms of cultural, social, political and structural barriers persist. One such barrier is that formal and informal leadership development programmes in education continue to reinforce the gendered nature of valued knowledge by not considering women's theories and perspectives on leadership. Another is that leadership theories and popular discourse about leadership tend to carry elements of patriarchies and other forms of hegemonic masculinities, with effects compounded by other aspects of diversity.

The recommendations that followed were about mainstreaming gender issues in policy making and implementation in practice, and in the content of preparatory programmes. Content suggested included the dynamics of stereotyping, work/life balance, and women role models. Delivery systems suggested included training tutors to have a 'gender lens' and offering adjunct

and informal career planning, mentoring and networking. Two fundamental concerns remain: equity of access to leadership roles and posts, and how educational organisations can create equitable conditions for this to occur.

Explicit policy developments in Australasia reflect such socially-critical concerns. New Zealand's KLP set out to address "a critical leadership challenge ... reflected in the disproportionately large number of Māori and Pasifika students who are not achieving their potential within the current education system. We must acknowledge that we have too many students who are leaving school without the level of qualification they need to succeed in life" (p. 4). It argued for the deliberate development of better relationships between teachers and students through cultural leadership, and might yet insist that such interventions be systematically informed by simultaneous monitoring of effect sizes (e.g. Bishop, Berryman, Cavanagh & Teddy, 2007). Similarly, Australian systems and professional associations have developed targeted leadership development programmes and other strategies to address the diverse needs and interests of leaders, student and learning communities (Anderson, Kleinhenz, Mulford & Gurr, 2008).

The national articulation of policies in both countries might usefully address how professional leadership development in education might help leaders learn how to make a real difference to access, participation and success in learning, teaching and leading with demonstrably effective and practical interventions. There is a caveat. Since there are many ways of providing critical management in knowledge organisations (Macpherson, 2008), such policy articulation also needs to proceed mindful of the relativity of the socially-critical perspective and ensure it never achieves absolute status as an ideology.

Leadership as personal learning in a planned career

A fifth approach is to apply evolving understandings of the mind, knowledge and learning to help practitioners sustain life-long learning about their professional identities, emotions and practices, in the context of a leadership career. Many of the national leadership development strategies reviewed above focused on the issues of self-development and promoted an awareness of internal patterns of learning about leadership. The general aim was transformation of self through a personal journey towards confident authenticity and connectedness in a learning community (Duignan, 2006).

It is interesting that a systematic review of theories of personal learning related to leadership (Beatty, 2008) identified the need for an expressive discourse to challenge the 'pervasive silence' concerning the deeply troubling inner experience of leadership, and the limits of the personal frameworks used to make sense of practice. The use of storytelling as a preparatory and developmental strategy was recommended because "in sharing their stories with each other, the healing can begin, and a transformative process occur as the personal professional and organisational self becomes reintegrated" (p. 154).

This approach was possibly recognised in passing in the KLP when it noted that "Principals can benefit from personal reflection, sharing ideas and initiatives with their peers, and working with others to clarify situations and solve problems" (p. 13). Similarly, while many programmes in Australia clearly provide opportunities for peer counselling (Anderson, Kleinhenz, Mulford & Gurr, 2008), emotional development remains a largely undeclared objective of preparatory and continuing development programmes for educational leaders.

A closely related dimension even more evident above in international policies and practices involves conceptualising leadership development as part of the life story and career history of principals. International fieldwork over decades led Ribbins (2008) to propose two ideal typical leadership pathways that clarify the sharp differences created by negative or positive separations:

Making (Formation), *Becoming* (Accession), *Being* (Incumbency as initiation, development, and autonomy), and either *Moving Out* (disenchantment and divestiture) or *Moving On* (enchantment and reinvention).

More broadly, this 'career path' approach recognises the socialisation processes that shape leaders' personalities, norms and values, prior to, during and after professionalisation as a teacher and as a leader in education. The concept of a personal 'career path' enabled Ribbins to unpack three general phases of being a principal in particular settings: at least three years initiation, the development phase of four to eight years, during which most recalled making the most progress as leaders, and autonomy marked by full mastery after eight years in post. It is notable that Victoria deliberately set out to comprehend and cater for the complex, diverse, psychological, interpersonal, social and political processes of acquiring a leadership role and *persona* in a workforce of professional leaders.

While this 'career path' approach might be criticised for equating educational leadership with principalship, and sometimes decoupling the learning of leadership from school development, the research using this approach has identified three issues of central importance to the design of preparatory and succession strategies: (a) the potential value of identifying early, 'fast tracking' and retaining able leaders, (b) reviewing national programmes intended to sustain and improve the supply and support of leaders, and (c) investigating strategies intended to re-energise long serving principals. This suggests that career path thinking should be an essential design feature of the learning scaffolding used to construct any national Professional Leadership Strategy. If the earlier approaches and concepts reviewed above are seen to be appropriate, such scaffolding should also provide for personal learning, cohere with the blend of national education purposes, focus on school improvement, and enabled the learning of cultural and philosophical leadership. These conceptual developments can now serve to a backdrop to the leadership development strategies reviewed in the next section.

Discussion

Pan-European trends were found to warrant three conclusions and a recommendation (Møller & Schratz, 2008) that, in turn, merit international consideration. First, the general changes to leadership development in Europe reflect how the balance of power between politicians and professionals over the control of education relates to degrees of centralisation or decentralisation of governance. To explain, countries with centralised governance and politicians preeminent in education policy making, such as in Germany and in the Czech Republic, tend to experience a hierarchical direction of leadership development. This also applies in Chinese societies. Centralised systems controlled by powerful professionals, such as in Austria's LEA, tend to develop expert governance of leadership development. Decentralised systems dominated by politicians, as in Hungary, tend to evolve stakeholder governance of leadership development. Since Norway and Denmark's decentralised systems exhibit a balance of professional and political power, they have blended stakeholder and professional self-governance in leadership development. The centralised system of leadership development in England is held to be a mix of hierarchical and expert governance reflecting the balance achieved between political and professional power. This is also the general situation in New Zealand and in Australian states.

Second, 'leadership development' has become a contested policy concept in most nations just as it has achieved contemporary saliency as a policy issue. One general account has it that knowledge of 'best practice' and 'leadership standards' can be derived and improved systematically by research, learned and applied to improve the effectiveness of schools. This account is criticised

for its reliance on partially ineffective behavioural-theoretical and de-contextualised concepts and standards. Another general account has it that, since occupational competence is specific to situation, and is achieved as practitioners make sense of lived experience and reflect on practice, it is to be enabled by building participative learning communities that question and build on embedded knowledge. This account is criticised for its devaluation of evidence-based knowledge and that apprenticeships may actually help preserve the status quo by not building the capacity to critique knowledge claims. The policy challenge presented by this simplistic dualism is to unpack and blend the merits of both accounts in the planning of a leadership development strategy, in order to avoid the disadvantages of devaluing either account.

Third, the changes to leadership development in education across many regions are increasingly struggling to balance supply and demand, especially where Baby Boomers are due to retire and where sectors are rapidly rescaling. The changes are also reflecting greater centralisation, with national and cultural differences often traceable to the balance of power between politicians and organised teachers. Nevertheless, the changes to leadership development are becoming less reliant on lay theories derived from teachers' personal experiences and moving to provide more systematic scaffolding that supports leaders' learning trajectories, their emergent professional identities in the life cycle of their learning community, as well as inter-generational learning for sustainability. These three conclusions were reconciled in one recommendation (Moller & Schratz, 2008):

Theoretical knowledge helps to enlighten leadership practice and reflect it with a broader contextual framework. De-contextualised knowledge of scholarship should receive equal recognition with contextualised knowledge. This implies formal, university-based preparation programmes for school leaders alongside collective sense-making, reflection on action and socialisation in communities of practice. Theoretical education has the potential to promote critical thinking if it includes an understanding of the type of control that state and society exercise on the school, a historical perspective on educational leadership within a national and local context, and an understanding of the micro-politics in schools. Although theoretical knowledge can never prescribe exactly what to do in a specific situation, personal theories cannot be discriminated from the concepts which are in use. Subjective theories are expanded in dialogue with research-based theories in a knowledge-building process. Establishment of a partnership between college/university and educational authorities, which also includes internship, could represent a promising approach (p. 363).

This conclusion was also broadly supported by a general review of the aims, audiences, designs, content and methods of school leadership development programmes in 15 countries (Huber, 2008). It concluded that they are moving away from preparing school leaders to administer or manage schools towards enabling them to continuously develop schools as learning communities. This trend has been further encouraged by New Zealand's KLP and by a number of Australian programmes, such as the *Leadership in Catholic Schools: Development Framework and Standards of Practice* (CECV, 2005).

Huber identified the main shifts in content in the programmes in the 15 countries as (a) developing leadership capacity through team building, (b) enhancing the distribution of leadership through many forms of horizontal and vertical collaboration, (b) leader development programmes having multi-phase and modularised designs, and (c) training for roles being better balanced by stronger personal development in communication, cooperation and change. Simultaneously, the emphasis in learning methods was moving from being solely course-based programmes to

include experiential methods, such as problem-based learning workshops, internships in authentic workplaces and mentoring. Huber's review did not report the efficiency or effectiveness of these changes, especially with regard to school effectiveness, which again bespeaks that need for national policy processes to be located in or at least strongly mediated by a methodologically sophisticated research and development context, a condition that is rare today in Australasia.

In a related comparative study (Huber & Pashiardis, 2008), the selection and recruitment of school leaders in England, Germany, Singapore, New South Wales, and the United States were examined for their overall approach, the degree of decentralisation of selection procedures, responsibilities, the use of national standards for school leaders, the use of prerequisites, the structure of the process used, the methods applied and the selection criteria used. Enormous variances on each dimension were found. It was realised that many more system studies were required, although, in the interim, it appeared that most countries needed to be more rigorous about general and legitimate expectations and leadership competencies for specific organisational contexts. It was concluded that selection processes could use a wider mix of diagnostic and evaluation tools to make prognoses about comparative performances in a specific role and context. Remarkably absent from all five systems reviewed were (a) agreements regarding generic school leadership competencies, (b) any approach that assumed that distributed leadership was a service function, (c) reliable measures of the effectiveness of selection procedures, (d) cost/benefit analyses of various approaches to selection, or (e) an approach that integrates diagnostic/ evaluation procedures, leadership experiences across middle and senior management positions in schools, and training and development opportunities to assure and develop leadership capacity.

Rusch's (2008) parallel review of the curriculum and pedagogy of educational leadership programmes around the world, less South and Central America and Russia, focussed on national or governmental standards or direction that provided the context for university programmes, programme descriptions of mission and content. Included were long standing (USA) and emergent (South Africa) programmes, and emerging entrepreneurial and non-traditional programmes. A common feature found was that each program, in each country researched, had a system of learning experiences intended to increase the knowledge base and skill base of aspiring and practising educational leaders. The most common system had 10-15 separately designed courses that were (a) unevenly interrelated, (b) rarely offered asynchronously to adult learners, (c) used a variety of pedagogies from knowledge acquisition to active and problem-based knowledge use, and (d) offered relatively common content with learning experiences typically scaffolding towards sophisticated expected outcomes, signalling a widespread adoption and application of adult learning principles.

Apart from these commonalities, Rusch found considerable variation in the definition of a 'course' and a 'programme' and whether or not the study of leadership was mandatory or a prerequisite for appointment. Wide diversity in curriculum and pedagogy was also found, often tracing to cultural and political traditions and ideologies. In the USA, the tradition that aspirant school leaders are educated in university settings, and thereby licensed to practise, was being challenged by strongly marketed private programmes. In China, "current political ideology is reversing the cultural and political traditions" of training and appointment while, in the United Kingdom and Africa, "the systems to create the systems are under construction" (p. 203). Despite this variance, three international trends were noted by Rusch: Leadership education and training was intended to improve student learning; the mastery of knowledge solely by thesis or research papers was being replaced by scholarly internships in many types of institutions; and aspiring leaders were spending less time in formal classes, as longstanding university-based degree programmes adopted more experiential approaches to scholarly learning.

As with Ribbin's work noted above, Barnett and O'Mahony's (2008) review of the growing popularity of mentoring and coaching in the professional development of school leaders conceptualised these provisions as role socialisation mechanisms involving phases of career development, stages of developing supportive relationships with peers, and reflecting on and co-constructing knowledge of practice. Their review of mentoring and coaching programmes in general, and in Australia, New Zealand, Singapore and in the UK in particular, also identified benefits and limitations through a critique of effects at five different levels. At the first level, participants almost invariably reported satisfaction with engagement in mentoring and coaching, except where the central relationship failed. At the second level, mentors reported that mentees' learning achieved role mastery, reduced feelings of isolation, stress and frustration, deepened understanding of the context, and enhanced problem solving and communication skills. Coaches reported that their novices learned how to model leadership behaviours, address standard challenges and the legacies of past leaders, take a more strategic view of events and opportunities, and how to delegate. At the third level, it was shown that having clear aims and outcomes, political support, selection and training infrastructure, a focus on learner needs, and continual monitoring and evaluation were key indicators of effective organisational support in mentoring and coaching programmes. At the fourth level, however, the research into participants' use of new knowledge and skills was very limited and inconclusive. Indeed, at the fifth level, there was no systematic evidence found concerning the impact of mentoring and coaching on student learning outcomes. Barnett and O'Mahony concluded that future research into mentoring and coaching in the professional development of school leaders will need to (a) use larger samples of mentees and novices, (b) focus on the perceived effects of mentoring and coaching programmes among stakeholders and teachers, (c) incorporate control groups, (d) conduct comparative analyses of programmes, especially the dynamics of mentoring and coaching relationships, and (e) measure the effect of mentoring and coaching on student learning. Evaluation was found to be a generic weakness of mentoring and coaching provisions, sustaining lingering doubts about the efficacy of these provisions with regard to the use of leaders' new knowledge and skills and effects on student learning outcomes. It appears that mentoring and coaching are highly valued and probably valuable preparatory and succession strategies, but have limits and are insufficient as a leadership development strategy.

More broadly, the evaluation of school principals' practices as a precursor to the improvement of their leadership services has also been found to be weakened by a number of forces. Pashiardis and Brauckmann (2008) came to this view by examining the wider justifications for educational evaluations (including system monitoring and school inspection), the methods used to evaluate school principals, the value of evaluation practices, and how future research and improved practices related to career stages. They found that the development of summative and formative tools for evaluating principals often traced to increasing stakeholder demand (for closer monitoring of school effectiveness and learning quality), education systems monitoring their own school improvement initiatives, international and comparative assessments of student learning, a growing culture of evaluation and public accountability in all branches of government, and the widespread application of America's *ISLLC* standards. Persistent problems were the mismatch between stated and perceived purposes of these tools, and the summative rather than formative nature of standards.

To illustrate, external evaluation managed by systems can evaluate principals as part of whole school evaluation or standards-based evaluation of schooling outcomes. External evaluation that evaluates individual principals can include direct observation by superintendents, peer evaluation and expert observation of simulated activities. Internal evaluation of principals can

include self-evaluation and portfolio evaluation. Criticisms of principal evaluation practices have therefore focused on (a) content (e.g. the balance of national/ state standards and context-specific criteria), (b) on process (e.g. how well the mix of evaluation methods used accurately describes and measures the quality of leadership services), and (c) on outcomes (e.g. how well the mix of methods used contributes to improvements to school leadership and the complex functioning and services of schools). Methodological critiques have focused on the balance between summative and formative purposes, the reliability of evaluation tools, and the validity of performance data. A key challenge identified by Pashiardis and Brauckmann's review is how principal evaluation might better cohere with career stages, assist with induction or role socialisation, and enable transition through the typical stages of principalship (Weindling, 1999) or to other principalships (Weindling & Dimmock, 2006).

Another challenge is the need for meta-evaluation to improve the way principal evaluation policy and practices serve the purposes and priorities of education systems and help sustain capacity building, again drawing attention to how Victoria's solution (a learning framework of domains, capabilities and developmental levels instead of standards) might be further improved. The conceptual challenges involved in meta-evaluation serving capacity building have been shown to be formidable, although Leithwood and Levin (2008) were also able to suggest a possible empirical pathway to better understanding and assessing the impact of leadership development in the future. The first challenge, they argued, is to clarify key concepts and their relationships, in theory. They suggested how 'leadership development' might be added to a model of assumptions about how leadership affects learning, through moderating and mediating variables, to suggest where and what data would need to be collected and analysed. They constructed a typology to describe the characteristics of leadership development programmes (structure, career stage and duration, nature of learning tasks, specialisation, credential, location and provider), to clarify the meaning and scope of 'student outcomes,' and thereby, how to detect the unique effects of leader development initiatives.

The second challenge, they proposed, is to construct a methodology that can measure leadership practices, measure student achievement, cope with policy and structural changes, and use a quasi-experimental research design that will permit the analysis of effect sizes. Assuming a causal chain from leadership development to teacher learning, and thereby to student learning, they warned, may (a) overly focus on individuals, (b) miss the uneven effects of leadership in a school, (c) fail to appreciate the subtleties of distributed leadership, and (d) misunderstand the moderating effects of the social and political subcultures of the school. In sum, their edge-cutting thinking demonstrates the critical value of scholarship and that the field is some way off 'proving' the effects of leadership development.

In the interim, we need to be critically aware of the gaps in the knowledge base of professionalisation. The conceptualisation and measurement of effects of leadership development on followers are underdeveloped universally. Many policies and much research conceptualises and evaluates educational leadership development in terms of student learning using simplistic causal stories that marginalise other key actors (e.g. teachers and parents), devalue management services, background the context (e.g. governance, structures, investment), and fail to recognise the diversity of leadership domains and opportunities in complex systems. The conceptualisation of capacity building tends to be restricted to 'the school' at a time when 'classroom leadership', 'team leadership' and 'system leadership' are all being explored or promoted, largely in good faith.

Thirdly, global thinking on leadership development is being driven by a new scholarship of leadership professionalisation that is centred on the nature and importance of leadership and on

preparatory and succession strategies. Lumby, Pashiardis and Crow (2008) noted many dimensions to this professionalisation agenda. They placed the challenge of purposes central to this new scholarship, as especially evident in the selection of preparatory and succession strategies, and noted that purposes currently exhibit diverse educational philosophies, ideologies, cultures and the political philosophies of interest groups. They argued that, while degrees of disagreement will inevitably continue on the detail of the effectiveness of leadership, most nations appear to agree that the primary purpose of professionalising leadership through systematic leadership development is to help improve the educational, social, cultural, aesthetic and economic outcomes of education and training, and hence appear to be committed to better preparing aspirants and further developing those in leadership positions.

An increasingly common trend evident in the cases above is to embed the development of professional knowledge, competencies and dispositions in two wider contexts: leadership capacity building in each school and capability building in the host education system. This is commonly taken to imply the need to move from (a) top-down planning to provide pre-service and in-service training principals, to (b) the collaborative planning of comprehensive leadership development that reconciles horizontal, vertical and temporal dimensions of educational organisation with the emotional, social, cultural and career dimensions of leadership service and with the knowledge-building processes of higher education, research and training.

Another general trend seen above is the move away from leadership development defined as standardised and time-bound programmes towards life-long learning reflecting career stages and the needs of individuals and their learning communities of legitimate stakeholders. One example is modularised and multi-phase designs attending directly to pedagogical and curriculum leadership, as well as managerial services, in order to initiate, support and sustain continuous improvements of benefit to students. Another example is increased importance given to communicative and cooperative leadership capacities that create co-constructivist professionalism through problem-based learning, team projects, internships, coaching and mentoring.

A less fortunate trend noted above is the politicisation of leadership development in settings where politicians and professionals dispute control over purposes, and where policy making is intensified by concerns over the quality and quantity of supply. Issues commonly contested in such settings include the degree of government control, the role of non-governmental providers, the status and reward differentials between leaders and teachers, the evaluation of leadership services, and what is considered to be an appropriate approach, content and pedagogy of preparatory and succession programmes.

An even less fortunate trend is the instability of investment in the advancement of knowledge concerning leadership preparation and development through research. The uncertainty is understandable. It has been traced by Lumby, Pashiardis and Crow (2008) to at least seven sources: (a) the continued absence of a definitive general theory of educational leadership, (b) methods of knowing leadership that tend to be unsophisticated and lack rigour, (c) a limited focus on the efficacy of development, (d) the continued dominance of Anglophone theory and practice, (e) the dominance of rationalism over cultural, emotional and religious dimensions, (f) the slow reconciliation of experimental and activity-based learning with course-based learning, and (g) the persistence of inequities, especially for women and people of colour. Most notable is the increasingly implausible tendency to equate and limit the concept of leadership to the role of principals, despite the plurality of evidence-based theories of leadership that record the incidence of distributed, dispersed, democratic and community leadership services in learning organisations, in communities

of practice and in networks of stakeholders.

Interim conclusions

With one caveat, the evidence, analysis and discussion above largely endorses the seven global imperatives that were found by Hallinger (2003) to be critical to leadership preparation in the future:

- Evolving from passive to active learning;
- Creating system solutions that connect training to practice;
- Crafting an appropriate role and tools for performance standards;
- Creating effective transitions into the leadership role;
- Evaluating leadership preparation and development;
- Developing and validating an indigenous knowledge base across cultures; and
- Creating a research and development role for universities.

The caveat is that, given Victoria's approach, the third imperative can be improved by replacing 'performance standards' with 'a learning framework'.

Space precludes an application of these imperatives to each of the Australian states, along with proposed modifications. The potency of doing so can be illustrated by returning briefly to the current state of school leadership development in New Zealand. There, applying Hallinger's imperatives suggests the following improvements: accelerate the general move towards customised blends of pedagogies in pre-service and in-service professional development opportunities; further embed such learning in professional practice; design a learning framework (instead of performance standards) as scaffolding for the formative evaluation of leaders and leadership preparation and development; evaluate the KLP policy for the quality of its indigenous knowledge base, skills and professional attitudes for application in multi-cultural settings; ensure that the development of the Professional Learning Strategy occurs in a context of an evidence-based and ongoing policy research and development project and the nation's narrative about the purposes of education; and, revitalise and re-integrate postgraduate learning of strategic leadership capacities by significantly expanding investment in a coherent staircase of leadership preparatory and succession strategies.

The evidence, analysis and discussion above also endorses the practical recommendations derived from the OECD's *Background Reports* and case studies of five outstanding innovations; that four policy levers and related initiatives be employed to improve school leadership development (Pont, Nusche & Moorman, 2008):

1. **(Re)define school leadership responsibilities**
 - a. Provide higher degrees of autonomy with appropriate support
 - b. Redefine school leadership responsibilities for improved student learning
 - c. Develop school leadership frameworks for improved policy and practice
2. **Distribute school leadership**
 - a. Encourage distribution of leadership
 - b. Support distribution of leadership
 - c. Support school boards in their tasks
3. **Develop skills for effective school leadership**
 - a. Treat leadership development as a continuum
 - b. Ensure consistency of provision by different institutions
 - c. Ensure appropriate variety for effective training
4. **Make school leadership an attractive profession**
 - a. Professionalise recruitment

- b. Focus on the relative attractiveness of school leaders' salaries
- c. Acknowledge the role of professional organisations of school leaders
- d. Provide options and support for career development.

These policy levers and initiatives would be particularly appropriate in a New Zealand context. Redefining school leadership responsibilities could untangle the current ambiguities of governance and recentralisation in education, deepen the shallow research base into leadership practices and advance deep learning about the dilemmas of practice. Distributing school leadership might help resolve the role overload created by overlaying administrative compliance regimes with a suite of reforms, and the role conflict generated by multiple accountability systems. Developing a national framework for leadership learning could help reconcile career pathways, institutional needs, demands for system leadership, and conditions of service. Making school leadership an attractive profession through the professionalisation of recruitment, salaries, national associations and career development would also be particularly timely given workforce demographics and the acute shortages in the early childhood sector.

A preliminary model of a career-based learning framework follows to help advance a research and development process intended to conceptualise a national professional leadership learning strategy. It refers generically to educational leadership in New Zealand's early childhood education and care centres and in state-integrated, private and special character primary, area and secondary schools. The modelling might be further elaborated to clarify programmes, providers and career options (e.g. Queensland's model, in Anderson, Kleinhenz, Mulford & Gurr, 2008). It might also be elaborated to attend to sector-specific challenges. It might also be adapted to deal with the issues found by research to be essential to neophytes' understanding of each role. To illustrate, it might respond to the findings of an ISPP study that showed how novice principals in small schools actually come to terms with "place, people, system and self" (Wildy & Clarke, 2008, p. 730). Finally, national policy modelling would also be enhanced by surveying the current attitudes and intentions of teachers and leaders with regard to preparing for, and sustaining, successful educational leadership services - the next research task to be attended to.

A Preliminary Career-based Learning Framework for Educational Leaders in New Zealand

Career Stage	Characteristic Roles	Focus of Learning Interests	Preparation Strategies, Pre-service	Succession Strategies, In-service
Potential leaders	Beginning teachers, kaiako, basic scale teachers with little current interest in offering leadership or management units	Mastery of classroom management and trialing innovations	Initial graduate teacher training includes classroom leadership	Pedagogical and curriculum professional development
Aspirant leaders	Fully registered teachers, kaiako, 'master teachers' seeking management units	Classroom and team leadership	Work shadowing Skills training in classroom leadership	Coaching and Mentoring LeadSPACE online resources, remodeled as LEA
Team leaders	Middle management roles: experienced teachers, kaiwhakahaere, teacher leaders, syndicate leaders, heads of departments, year level coordinators	Team leadership and project management	Work shadowing Team Leader Identification and Recruitment Program National Aspiring Team Leaders' Programme	Annual Induction & Development Conference Coaching and Mentoring LeadSPACE online resources, remodeled as LEA Postgrad scholarships in educational leadership
Executive leaders	Senior management roles: members of senior management teams, assistant principals and deputy principals	Educational management, executive functions	Work shadowing Executive Recruitment Program National Aspiring Senior Managers' Programme	Annual Induction & Development Conference Coaching and Mentoring LeadSPACE online resources, remodeled as LEA Postgrad scholarships in educational leadership
Institutional leaders	ECE directors, head teachers, teaching and non-teaching principals	Educational leadership and educational management	Work shadowing Institutional Leaders' Recruitment Program National Aspiring Principals' Programme	First Time Principals' Program Annual Development Conference Coaching and Mentoring Principals' Development Planning Centre Principals' Professional Learning Groups LeadSPACE online resources, remodeled as LEA Masters and EdD scholarships in educational leadership
System leaders	ECE senior teachers, system managers, program leaders, advisors and consultants	System management and strategic leadership, policy making and implementation	Leaders' Retention Program National Aspiring System Leaders' Programme	Annual Induction & Development Conference Coaching and Mentoring LeadSPACE online resources, remodeled as LEA EdD/ PhD scholarships in educational leadership

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