

LEARNING TO BE A HEADTEACHER FOR WALES

A review of the National Professional Qualification for
Headship in Wales

Abstract

A review to evaluate the preparation and qualification of headteachers in order to determine ways in which they could be more effective for both the individual and the education system

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Learning to be a Headteacher for Wales: A review of the National Professional Qualification for Headship

Overview

The purpose of this review was to evaluate the preparation and qualification of headteachers to determine ways in which they could be more effective for both the individual and the education system.

The report results from the analysis and synthesis of information gleaned from conversations with people who were representative groups of the partners involved in the current programmes. These included many headteachers: those who had recently experienced the programme as well as experienced headteachers who might now act in a professional capacity within the provision of the programme as leadership coaches, assessors or mentors. Both successful and unsuccessful candidates were interviewed along with prospective entrants to the programme. Also interviewed were representatives of regional consortia, local authorities and diocesan authorities. Universities and representatives from higher education institutions (HEI) formed another overlapping interest group. Meetings took place with a range of organisations, boards and agencies including the Education Workforce Council (EWC), Estyn, teacher unions and professional associations. Over 250 people took part in the review, both as individuals and as members of small seminars, mainly joining conversations on screen though some were in person. A small number of people elected to write to the review, prompted by invitations in Dysg.

The views gathered were considered alongside an analysis of documentation relating to current programmes and the qualification as well as data from a range of sources. Research into preparation for headship and approaches to developing candidates for headship in other nations was also analysed in relation to the guiding principles of the education reform agenda in Wales.

This report makes use of the findings of the Independent Review of Leadership produced by Professor Alma Harris et al¹. In accordance with the remit letter for the review, however, this review focuses on one aspect of leadership development: preparation for headship.

The report is organised into four parts:

Part 1: looks at the current programme and determines the need for revision,

Part 2: establishes some principles for a revised programme,

¹ Harris, A., Hutt, M., Jones, M. and Longville, J. (2021) Independent Review of Leadership: Final Report. Available at: <https://www.gov.wales/sites/default/files/publications/2022-05/independent-leadership-review-nov-2021-en.pdf>

Part 3: recommends a series of revisions for the qualification and programme,

Part 4: deals with wider aspects of the remit for the review.

The report points to a timely and widely felt need for a revision to the programme. The twin urgencies of the pace of the nation's education reform journey and the restatement of purpose following the Covid-19 pandemic, point to a need to invigorate preparation for headship to ensure the next phase of national development and make school leadership both valued and attractive.

The recommendations in this report are intended to address the issues that emerged from the evidence during the review. They propose a change of emphasis and requirement with renewed rigour in support of one of the most influential, rewarding but challenging roles in the school system. The recommendations describe a coherent programme with system-wide support to develop the leadership capabilities of suitable individuals to become the headteacher they and the country would want them to be in order to be a force for good in the lives of the next generation of young people in Wales.

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- serving headteachers who offered candid insight into their experience, successes, challenges and needs,
- recent and current participants on the programme who reflected on the effectiveness of the experience from their perspectives,
- leadership coaches, assessors and mentors, who were either serving or recently retired headteachers, and shared their experience, perceptions and suggestions,
- staff and associates of the National Academy for Educational Leadership who provided background on current provision and insight on development,
- University senior staff and course organisers who offered insight to both Masters and ITE provision.
- teaching unions and professional associations, who represented their memberships' views,
- school governors who reflected on their experience of appointing and working with headteachers as well as their knowledge and understanding of the programme,
- course presenters, who described their sessions with prospective and serving headteachers,
- EWC, which offered perspectives on both headteacher development and the workforce position in school leadership,
- directors of local authorities, who shared perceptions and observations relating to regional variations and trends,
- Estyn, who furnished background from inspection evidence,
- members of the diocesan authorities who provided background on leadership arrangements and provision in their school communities,
- a gathering of colleagues from Welsh-medium schools who offered their perspective on school leadership,
- individual respondents through Dysg, who provided written information and views,
- representatives of commercial organisations providing leadership programmes in parts of Wales commissioned by local authorities and regional consortia, who offered their perception of the needs of senior leaders in schools,
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A reference group for the review, appointed by Welsh Government, met on several occasions and provided timely insight, advice and challenge.

The reference group for the review comprised:

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Everyone who contributed to this review did so in positive and open spirit and was keen to emphasise the vital role that headteachers play in the nation's future.

Glossary

Definition	Acronym/ key word
AAE	Adverse Adolescent Experiences
ACE	Adverse Childhood Experiences
ADEW	Association of Directors of Education in Wales
ALN	Additional learning needs
BAME	Black, Asian and minority ethnic
DfE	Department for Education (England)
DSO	Designated Safeguarding Officer
EWC	Education Workforce Council
GDPR	General Data Protection Regulation
GTCS	General Teaching Council for Scotland
HEI	Higher Education Institution
ILM	Institute of Leadership & Management
IWPRB	Independent Welsh Pay Review Body
ITE	Initial teacher education
LA	Local authority
NAEL	National Academy for Educational Leadership
NAPL	National approach to Professional Learning
NPQH	National Professional Qualification for Headship
NPQEH	National Professional Qualification for Executive Headteachers
NQT	Newly qualified teacher
OECD	Organisation for Economic Co-Operation and Development
PLP	Professional learning passport
QTS	Qualified teacher status
SWAC	School Workforce Annual Census

Introduction

Headship in Wales has entered a new era. The expectations and responsibilities have shifted as the school system seeks to serve children and young people yet better and building a stronger future for the nation, by providing the best possible educational experience.

The paragraph above could have been written at any time in the last fifty years. It is part of the enthralling nature of the role that headteachers will see their remit unfold, develop and change as they exert influence over schooling in response to accelerating social, political, technological, economic and environmental changes. The Welsh Government's education reform agenda sees headteachers as fundamental to its success both in leading individual schools and working as a headteacher community of expertise.

The covid pandemic battered schools. Parents and communities often saw schools as their nearest accessible support at a time of great uncertainty. The leadership and staff of schools shouldered unexpected burdens as local and national government strove to address one of the greatest social challenges in generations. Now the leadership of schools is coping with the challenge of a cost-of-living crisis, both in terms of managing their schools efficiently and also supporting many families facing food and fuel poverty.

Most headteachers embrace the reform agenda and do so with optimism and energy, bringing expertise and commitment to a shared endeavour. Some find the changing expectations challenging but all seek to provide the pupils in their care with the best possible opportunity.

It is against this background of a time of ambition being veiled by uncertainty that the review of the provision for preparation and qualification for headship takes place. The school system needs the best headteachers which means it has a responsibility to encourage them, train them and support them as they bring their unique professional perspective to the challenging role.

Part 1: The present situation

Background to the NPQH

The NPQH was introduced in 1999 and it became mandatory for appointment to headship in 2004.

The requirement for anyone appointed as a substantive headteacher in Wales to hold the NPQH was confirmed in May 2017 and again in March 2022.

In 2017, the then Minister emphasised the commitment to keep the NPQH as a requirement, setting the bar high for those entrusted to lead and support pupils in Wales. She considered that the NPQH acted as a quality mark, albeit one which needed to be improved.

To support the Minister’s vision, working in partnership with the regional consortia, the Aspiring Headteacher Development Programme was introduced in 2019. The Aspiring Headteacher Development Programme received endorsement from the National Academy for Educational Leadership and the first cohort on the newly developed programme began in 2020. The Aspiring Headteacher Development Programme introduced a developmental aspect of the NPQH linked to the Professional Standards for Teaching and Leadership² that had also been approved and published in 2017. The Aspiring Headteacher Development Programme with a notional five days of commitment on the part of candidates, is seen as a precursor to the assessment for the NPQH and a preparatory programme to support candidates in both the assessment and their first headship. The programme runs annually over two terms and the cohort size at qualification remains steady at around 115 per year³.

In May 2022, the Minister re-iterated the commitment to keep the NPQH and continue to develop the programme through a written statement that announced a review of the NPQH. This followed an ‘Independent Review of Leadership’ in 2021, conducted by a panel led by Professor Alma Harris⁴ which concluded:

“The NPQH is generally viewed as an important threshold qualification. An external review of the current NPQH model is both important and necessary to ensure it remains fit for purpose and meets the needs of school leaders in the future.”

The position in other nations

In Scotland in 2015, the Government made it a legal requirement that all new headteachers must hold the Standard for Headship awarded by the General Teaching Council for Scotland (GTCS). This is provided by the Scottish College for Educational Leadership supported by seven universities working in partnership.

In Northern Ireland, a new National Professional Qualifications (NPQs) framework has been available since September 2021 which includes the new National Professional Qualification for Headship (NPQH) for school leaders who are, or are aspiring to be, a headteacher or head of school with responsibility for leading a school. Whilst the new NPQs remain voluntary, they are a nationally recognised suite of qualifications that teachers and school leaders are being encouraged to complete as part of their ongoing continuing professional development.

In England, the NPQH remains voluntary but almost all headship appointments specify it as a requirement. The qualification forms part of a series of NPQs providing a new career-long

² Welsh Government, professional standards: <https://hwb.gov.wales/professional-development/professional-standards>

³ From data within evaluations of NPQH, 2019-22

⁴Harris, A., Hutt, M., Jones, M. and Longville, J. (2021) Independent Review of Leadership: Final Report. Available at: <https://www.gov.wales/sites/default/files/publications/2022-05/independent-leadership-review-nov-2021-en.pdf>

‘golden thread’ of professional development and qualification. This provision is similar to the Welsh professional pathway⁵ within the NAPL⁶ but extends beyond headship to provide a NPQ for Executive Headteachers (NPQEH). The principle of the ‘golden thread’ is disputed with many observers finding it over prescriptive, over centralised and susceptible to political influence. While the suite of programmes offers coherence and is evidence based, many argue that the evidence is selective and programmes biased towards instructional rather than transformational leadership. Others maintain that a highly focused consistent delivery model will bring consistency of practice and outcomes.

Beyond the United Kingdom, most nations and jurisdiction offer a programme of support to enable successful early headship experience and many require qualification. Most of the United States of America have a qualification bar to headship. In Ontario, Canada, prospective headteachers are nurtured from early career and progression through leadership is guided by superintendents of schooling who negotiate the changes in headship across a community of schools. Similarly, in New Zealand the push towards autonomous schools, with the removal of most of the ‘middle tier’, is seeing a ‘communities of learning’ initiative which binds schools together in collaborative activity and helps to develop early career leadership capability, similar to the best examples of cluster working in Wales. The New Zealand programme is encouraging the identification and support of prospective headteachers. The concept of building networks of schools which support headteacher development is also strong in South America, notably in Chile, where evidence of benefits to less affluent communities is beginning to emerge.

It is harder to provide examples of leadership development in Asia than in Europe and North America because there is less evidence on which to base the case effectively⁷. Moreover, the context is different. Singapore’s programme for headteacher preparation is, however, widely admired. In this city state, talent is spotted and developed and a sophisticated and well-resourced programme ensues with a very small cohort taking part in extended secondments to agencies of government to ensure clarity of purpose in headship.

Many countries have not always prioritised leadership in academic or research terms and OECD⁸ is only just beginning to investigate differences. Indeed, practice in many areas of the world relies heavily on the influence of ‘western’ culture.

⁵ Welsh professional pathways (2019) <https://www.wjec.co.uk/qualifications/pathways-work-welsh>

⁶ National approach to Professional Learning (2018) <https://hwb.gov.wales/professional-development/national-approach-to-professional-learning>

⁷ Hallinger, P (2011) Developing a knowledge base for educational leadership and management in East Asia. *School Leadership & Management* vol 31 no4 h (p305-320)

⁸ OECD (2021) Teachers’ professional learning study: Diagnostic report for Wales, OECD Education Policy Perspectives, No. 33, OECD Publishing, Paris, <https://doi.org/10.1787/caf912c7-en>.

The current programme in Wales

The current programme is a national provision, managed by a leadership team representing the regional consortia and working together. The National Academy for Educational Leadership endorses the Aspiring Headteacher Development Programme, which is a precursor to the NPQH assessment process.

The current programme offers candidates a coherent learning opportunity as part of the leadership pathway, building on previous provision and supporting each individual through the Aspiring Headteacher Development Programme towards the NPQH assessment.

- Each candidate is expected to produce an individual Leadership Standards Review which helps them to reflect on their leadership experience to date and demonstrate their readiness for headship.
- Each candidate is guided through the programme by a leadership coach who supports them individually and collectively.
- The taught elements of the programme offer an overview of the Welsh education reform agenda and opportunity to engage with literature related to research and practice.
- Experienced school leaders present case studies for prospective headteachers to consider.
- There are briefing session on managerial aspects of leadership such as finance and health and safety.

The current submission for endorsed provision follows a template set by the National Academy for Educational Leadership. These submissions are thorough, taking account of relevant policy initiatives in the context of the specific pathway programmes. There is clarity and differentiation in respect of the leadership programme design with the continuum of leadership development stages, illustrated diagrammatically:

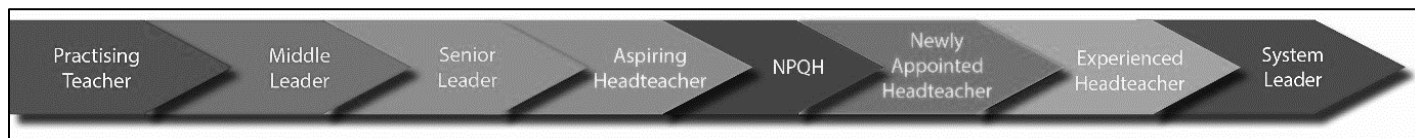


Figure 1: Professional Learning to support the development of Inspirational Leaders across Wales ⁹

Strong efforts are made to address the principles of Welsh Government policy development and publications and particularly the National approach to Professional Learning.

⁹ Regional School Improvement Consortia (2020/21) Leadership Development Programmes. Available: <https://www.gwegogledd.cymru/wp-content/uploads/2020/10/Professional-Learning-to-support-the-development-of-Inspirational-Leaders-across-Wales.pptx>

The strengths and weaknesses of the current preparatory programme and assessment

The regional leadership team manages the programme and assessment effectively and efficiently working hard to ensure that there is consistency of provision across the country as well as fairness and equity for all candidates.

The various elements of the programme are carefully constructed and presented and materials and organisation professionally managed. In terms of the NPQH assessment centre arrangements, the team is scrupulous in all aspects of organisation.

The review sought to gain views about the effectiveness of the preparatory programme in equipping new headteachers for their entry into headship. Just as everybody seems to have a view on the effectiveness of schools because they attended one, so most headteachers have a view on the NPQH and its preparatory processes and effectiveness because at some point they experienced it.

A view on effectiveness of the current programme emerges from taking the views of current and very recent participants who have knowledge of the present programme and of those who act as leadership coaches or assessors. These are weighed alongside a study of documentation and the views of those who lead the provision.

Every element of the programme is appreciated by most and praised or criticised by several others. This can be said for all of the following:

- the expertise and commitment of the leadership coaches,
- the creation of network communities and the opportunity for philosophical discussion and debate,
- the quality and range of the reference background; texts, videos and podcasts offered as a 'playlist',
- the work on leadership styles and leadership behaviours,
- the opportunity to meet and hear from experienced headteachers,
- the briefings on aspects of management, including finance and health and safety,
- the opportunity to make apparent the relevance, applicability and transferability of leadership experiences related to the Professional Standards for Teaching and Leadership,
- the arrangements for the NPQH assessment centre.

The content and approach to the Aspiring Headteacher Development Programme does much to build confidence in prospective headteachers and consolidate their experience over recent years within the context of prospective headship: it has the effect of confirming through guided reflection that experience has been gained which will stand the individual in good stead as they meet new challenges.

However, the programme for aspiring headteachers needs to do more than that. It needs to enrich their experience to date and use it as a springboard towards anticipated new settings and a new educational vision for education in Wales. Many are critical about the extent to which the programme is applicable to the world of early headship in which they have found themselves trying to succeed. They are clear about some of the shortcomings and these are commonly expressed as:

- the lack of practical applicability, and
- inattention to the immediacy of many demands in the role, including:
- a lack of awareness of approaches to dealing with many managerial and procedural aspects,
- insufficient preparation for coping with a changed and unfamiliar school environment in the first headship, and
- an absence of strategies for building a team around a new leadership agenda.

The experience of the NPQH assessment centre

Each candidate makes timed oral presentations to a panel of three assessors. The given standardised titles for the presentations relate to the candidate's preparedness for headship and their commitment to the role as well as to the approach they would adopt in leading a school. The candidates are then questioned about the content of what they have offered to provide a chance to clarify or extend aspects of the presentation or to try to draw out aspects not covered. The Professional Standards for Leadership form the basis for decisions about whether the candidate has met the standard expected or not.

All concerned state that the process is carried out with fairness. The panels are carefully selected to avoid conflict of interest and less experienced assessors are placed with more experienced. Sessions are strictly timed and criteria are clearly stated.

Some assessors report that they feel constrained occasionally by the process, sometimes having doubts about suitability but, when presented with the appropriate written or oral evidence, are required to deem the requirement 'met'. Assessors rarely report a concern about deeming the standards 'not met'.

Many candidates were disappointed by the lack of feedback following the assessment centre experience. They are informed of the outcome by email at an appointed time but detailed feedback is only available on request. Few candidates who have not met the required standard use the appeal procedure and unsuccessful candidates generally accept the situation and many re-apply subsequently.

The proportion of successful candidates is stable at around 85% with some each year not presenting for assessment.

The administrative aspects of the programme

All administrative aspects were well regarded to the extent that any evaluation would conclude that the programme is well managed and worthwhile. The regional leads who organise the programme are seen to be committed and thorough in their work and their efforts to sustain the programme as effectively as possible through the last two years are appreciated. Modules of the programmes originally envisaged as face-to-face experiences were quickly amended to be available online leaving hybrid options for the future as a very real possibility.

The participants' expectations

There are mixed views about the purpose and effectiveness of the programme from the participants, contributing leadership coaches and assessors and the wider community of interest. As people talk from their own experience, some speak about a range of different versions of the programme, with some reflecting on experience over ten years and two headships ago. Anyone involved over the last two years is describing the programme presented entirely online, which while effective in bringing people together easily, distorted the experience, particularly of the assessment centre.

One issue that comes through strongly is the range of purposes that candidates see. For some, the programme is seen as a 'top up' to experience already gained, for others it is a process of re-assuring persuasion that an individual has the capability to do the job, for some it is a chance to widen experience prior to headship. These purposes imply differing motives and the current programme does not satisfy all.

Criticism was expressed by different individuals and about different elements of the programme, pointing mainly to a lack of personal relevance or a poor personal experience.

A significant area of criticism related to the assessment centre experience. Some candidates expressed their view that their panel had not been receptive, especially to personal circumstances, had a fixed agenda, was at odds with the direction of travel for education in Wales, or was seeking to complete their task of reporting on the candidate rather than engaging with the presentations. Typically, these criticisms came from people who had not met the required standard through some in that position were very open about their poor performance on the day.

Other criticism came from people acting as assessors who expressed their concern about the extent of prescription in the process. While recognising the need for consistency, some assessors expressed the view that 'working to the letter of the instructions' would see some suitable candidates denied and some questionable candidates approved.

A further and recurring criticism was the perception that success in the assessment centre can be secured with superficial understanding and expertise through the ability to hit the criteria in terms of written or oral presentation which would 'tick the boxes' or 'switch all

the lights on' and the programme therefore rested on the capacity to 'jump through hoops'. This was expressed by many candidates, both successful and unsuccessful, and represents one of the significant challenges to the programme. It is essential that those who secure the NPQH believe it to be a valid endorsement of their capability. This is not the case at present.

It is not possible to test the validity of these concerns and criticisms but it possible to say that the organising team works tirelessly to secure fairness, taking into account a multitude of complexities and setting clear expectations of all involved with solid criteria to ensure reliability. The limited number of appeals would indicate that unsuccessful candidates typically accept the decision, however grudgingly.

There are weaknesses in the current programme. However, these are more about what is absent than what is wrong with how it is presented, though the assessment centre is a major concern. This will be addressed in Part 3 of this report which outlines a revised content and programme arrangement designed to meet the future needs of new headteachers.

The main element that the majority of contributors to the review believe is insufficiently addressed is that of the managerial aspect of leadership. Many experienced headteachers told the review of their belief that potential headteachers were being discouraged by what they see as the acute pressure upon headteachers in managing their school: finance, human resources, premises along with the long list of complexities within each and the need to address the governance and accountability agendas. They feel ill-equipped to carry out the role and do not find it attractive, believing it will take them away from their passionate interest in helping pupils to learn.

The pandemic and its ongoing affects have led to a situation where every day, if not a crisis, is a challenge as headteachers grapple with staff shortages and intermittent staff absence as well as variably coping with the often-reported effects of the pandemic as seen in the changing attitudes of parents and in pupil behaviour. When put alongside the other issues noted in the Independent Review of Leadership as the major challenges for leadership: resources, staff vacancies, workload and inspection, it is reasonable to argue that this managerial side of leadership has more prominence than for some time.

While this issue was the most common aspect of the programme that was seen as an area of necessary improvement, there were many others that were suggested as 'essential' aspects of any aspiring headteacher programme. These were elements that would focus upon the headteachers' capacity to know themselves as an individual and as a leader and to lead a team, work with the community, including parents, deal with external agencies and act as a figurehead in the local community.

In short, contributors to the review offered a comprehensive outline of the necessary experiences, skills, knowledge, attributes, qualities and capabilities that a headteacher should possess, all of which were valid.

The problem is one of proportion and perspective. Provision is limited by resource and the current programme is the equivalent of five days duration. All parties need to be realistic about what can be achieved in the time available and what can be gained through leadership experience in other arenas beyond the programme.

Overall, there are three significant areas in which the programme is limited.

- It relies entirely on the Professional Standards for Leadership which, though important, should be the reference point for the agenda of the programme rather than the core.
- It offers a very limited prospect of personalisation as candidates follow a generic agenda. The range and variety of schools in Wales demands a more nuanced approach to the programme and the challenge for the organisers is to relate the generic programme to candidates with very different career experience and headship aspiration.
- It is over-reliant on reflection upon career experience to date, encouraging candidates to consider the role of leaders and their approach to leadership rather than equipping them with some of the necessary practical insights to sustain them in their first headship.

The NPQH does not carry sufficient weight to convince appointing bodies of candidates' worthiness for their first headship and, in too many cases, the candidates themselves are unconvinced.

Summary: The quality and effectiveness of the programme and qualification
The current programme is the result of several amendments and adjustments over time. It has served its purpose and has been managed well within its current remit. ***The programme now needs substantial revision to meet the expectations of the national education reform agenda.***

The current arrangements place emphasis on building candidates' confidence by reflecting upon the career experiences to date and ensuring they can articulate their commitment and ability to lead a school through reflection on the Professional Standards for Leadership. The prospect of the assessment centre is used to guide the experiences of the candidates representing a barrier to be crossed to secure a desired career opportunity.

The emphasis needs to shift; the programme needs to be more bespoke to individual candidates and more cognisant of the demands upon headteachers and their role in securing the success of their school and the national agenda. The nature and process of the programme needs to invigorate candidates as they acquire and develop leadership capabilities which will ensure a positive impact on the life chances of pupils. The programme needs revision to enable candidates to build expertise and confidence through

active engagement with the anticipated challenge of headship obtaining direct and influential feedback in the context of the Professional Standards for Leadership.

Eligibility and recruitment for the NPQH programme

Recruitment takes place on an annual cycle with candidates being invited to apply in the autumn and presenting their case for inclusion in the cohort. Successful candidates join the Aspiring Headteacher Development Programme in January with assessment for the NPQH a year later, with the outcome announced in early summer. There is a restriction on the size of the cohort nationally.

The expectation is that the candidate will be applying for headship in the next two years and references are taken from the candidate's current headteacher, local authority and regional consortia. The candidate's suitability is assessed against the Professional Standards for Leadership and all candidates are informed of the outcome on the same date. The management of this process is efficient and effective.

In terms of eligibility, candidates are expected to be serving deputy headteachers. However, the review found several examples where this requirement was overlooked. Some of these were anomalies resulting from pragmatic decisions and others were examples of people taking advantage of the system. The review met individuals who had secured the NPQH without any intention of becoming a headteacher. For example, a person working in an advisory capacity for one of the regional consortia who believed that possessing the NPQH would provide credibility for work in schools. There were other examples, such as individuals who had secured the NPQH with the intention of bolstering their claim to the headship of the school in which they were deputy headteacher and, not being successful in that, had decided to make no further applications.

In Wales there are approximately fifty teachers to each headteacher in secondary schools and, in primary schools, fourteen teachers to each headteacher. Finding the right quantity and the right people to take the step to headship is the challenge coupled with encouraging them to do so, first through the NPQH and then into headship.

Eligibility and recruitment for appointment to a first headship

There is on-going concern about the recruitment of sufficient suitable headteachers. The last two years have been unusual in terms of employment patterns. Anecdotally, some headteachers have remained in post to bring stability for their community during the stressful time of the pandemic. Also anecdotally, some headteachers have decided to leave due to the pressure of the stressful time of the pandemic. Comparative data are difficult to obtain.

In 2020/21, just 65 headteachers left their role with just under 60% of those (40) taking retirement¹⁰. Many more people secured the NPQH (154) in 2022, the first cohort after the suspension for the pandemic. Many of these were acting headteachers upon completion of the programme. In the last two years 40% of appointments to headship were of acting headteachers, a higher proportion than might have been expected and judged by many to be associated with circumstances around the pandemic. The number of acting headteachers in Wales stands at around 120 annually, about 8% of the total¹¹.

Many schools are 'selecting' schools, meaning they are seen to be in favourable circumstances and therefore able to draw the best candidate from a pool of applicants. Other schools are 'recruiting' schools, meaning they are trying to encourage potential applicants to consider the headship in their school which for one reason or another is comparatively less attractive to the generality of would-be headteachers. In the latter category sit some, but not all, small schools, Welsh medium primary schools, schools of religious character and schools with difficult recent histories. Local authorities have responded to the recruitment challenges presented in a range of ways, using acting headteachers in temporary posts or creating federations of two or more schools under the control of an executive headteacher. This creates a range of variously described 'head of school' posts which do not carry the ultimate responsibility that seems to be attracting some while deterring other people.

The number of federations is growing, in both formal and informal temporary arrangements as collaborations¹². In January 2023, formal federations numbered 54¹³. Those employed as head of school do not require the NPQH at present, sheltering behind an executive headteacher role. While this solves an immediate problem for the schools concerned, the situation will re-occur in the future unless the heads of school are brought into the wider leadership agenda positively.

As well as the concern over recruitment generally, there is particular concern over the proportion of people with the NPQH who do not put themselves forward for headship. Though there is no secure data, it appears that of the 100 and more successful candidates for the NPQH each year, an estimated 15%¹⁴ do not apply for headship within two years. This means that there is a pool of 'dormant' NPQH holders across the country.

¹⁰ Source: School Workforce Annual Census (SWAC)

¹¹ Source: SWAC

¹² A federation is a legal process (following the Federation of Maintained Schools (Wales) Regulations 2014, as amended) whereby two or more (up to six) schools form one governing body. Some schools also collaborate, in a less formal arrangement, but still following a legal (but different, set out in the Collaboration Between Maintained Schools (Wales) Regulations 2008) process - this is often called 'informal' or 'soft' federation, but it is actually collaboration.

¹³ Source: Welsh Government

¹⁴ Source: Analysis of data supplied by EWC, WG and NPQH organisers.

The EWC has a statutory duty to maintain a register of education practitioners in Wales. The legislation lists the fields that should be included on the register of education practitioners and one of these is NPQH. Currently this indicates that there are over 475 serving deputy and assistant headteachers who have the NPQH¹⁵. Of these, more than 100 will have been awarded the NPQH in the most recent cohort but many have held the qualification for several years and some have never made an application for headship.

The requirement for appointment to a headteacher post in Wales is the possession of the NPQH. However, this requirement is often not being valued by appointing bodies who are not aware of its status or content. The qualification is also being overlooked or side-stepped, often in particularly complex or difficult recruitment circumstances within specific schools where well-argued exceptions are made. For example, where there are no suitable applicants for a headteacher vacancy, perhaps after two rounds of advertisement, the local authority works with governors to identify and secure a suitable temporary headteacher. This might be the deputy headteacher within the school who becomes acting headteacher, even though they do not possess the NPQH. There being no limit of the extent of such tenure and with the school appearing to be secure, the period of acting headship can last for several school terms. When the post is re-advertised, the 'sitting tenant' is in a deservedly strong position to secure the substantive role. If appointed, the stipulation might be set that the post is conditional on the NPQH being secured within the next cohort. All this sounds reasonable and logical but can lead to the requirement for the NPQH and the qualification itself losing credibility.

There are examples of acting headteachers being in post for extended periods of time due to the uncertain lengths of a headteacher's absence through illness. What begins as a natural situation, where the deputy would take on the defined expectation in their role and deputise, becomes a situation where the headteacher role becomes assumed. At the point where the uncertainty over the headteacher's future ends the deputy has acted for so long that they would reasonable be expected to apply for the role which they have been undertaking.

While such examples are understandable, they provide case law against which others then act, wittingly or unwittingly, and further reduce the importance of the qualification. For example, it can be assumed by a governing body that, when their headteacher retires, the deputy headteacher would be the most appropriate replacement. If the headteacher announces a retirement near to the deadline, then the most obvious way forward is to ask the deputy to 'step up' temporarily' with the same impact as above.

The review heard examples of deputy headteachers who possess the NPQH feeling aggrieved that they had been unsuccessful in a headship interview with the post being offered to the acting headteacher without the NPQH. The effect of this is to deter some

¹⁵ Source: EWC

people from application where there is an acting headteacher in post, leaving governing bodies with the argument that they have limited applications from which to select.

In the last two years, 65 deputies have moved to headship with just under half having been promoted within their current school¹⁶. Of course, most are doing an excellent job! Nevertheless, while there can be obvious immediate benefits in the appointment of the deputy or acting headteacher, especially during the period of uncertainty created by the pandemic, appointing bodies of successful schools are also aware of the potential disadvantages. An external appointment brings fresh eyes, different experiences and perceptions and alternative ways of addressing long-standing issues. While the appointment of a headteacher from within the school can bring stability in the short term, that same stability can soon be the enemy of continuous improvement which is the hallmark of successful schools.

The review met several examples of anomaly within the supposedly straightforward expectations surrounding headship preparation and appointment. There was the example of the individual who was applying for acceptance onto the Aspiring Headteacher Development Programme, having already served as acting headteacher and unofficial chief executive in a collaboration between two schools. There was another example of the deputy headteacher with the NPQH who was being asked to deputise for her own headteacher as she worked for three days per week in another local school as acting headteacher. There will be a logic to the decisions that have led to these situations, but the effect can be to minimise the status of the NPQH as valid, worthwhile and important.

At the same time as a proportion of those with the NPQH are not securing headship, deliberately or inadvertently, there are examples of people being deemed unable to enter the programme. In parts of Wales there are schools where the deputy headteachers have secured the NPQH with no intention of being a headteacher. This means that they are blocking the route to headship for others who are told that they cannot access the programme with assistant headteacher status and schools are allowed only two deputy headteachers. The outcome is a likely lack of local applicants for vacant headteacher posts even though there is evidence of people willing to take on the role being available.

The issue of a 'fast track' NPQH

The review considered the anomalies in the system caused by circumstances such as those just described above and in particular of those appointed from the post of acting headteacher, served over varying lengths of time. Another was the appointment of serving and experienced headteachers from England or other jurisdictions which do not require the NPQH.

¹⁶ Source: SWAC, 2022

There was no universally agreed answer: there were suggestions that the appointed candidate could be exempt or awarded the NPQH based on experience gained in post. Others suggested that there could be a 'fast track' NPQH to enable those appointed to headship without the NPQH to gain understanding of aspects of the requirements that may be lacking. In particular this applied to those appointed from school leadership from outside the country being updated on the Welsh education reform agenda but accepting that other aspects of the current assessment requirement that would have been addressed in post.

Endorsement and Quality Assurance of the preparatory programme

The Aspiring Headteacher Development Programme is endorsed by the National Academy for Educational Leadership which applies a peer-led, criterion-based process to ensure compliance with the requirements for demand of a professional learning programme at Masters Teaching Level 6.

Once endorsed the programme is subject to annual monitoring report by the National Academy for Educational Leadership. This is a peer led, criterion-based process which starts with the internal evaluation of the provision by the provider and submission of a Quality and Impact report. The National Academy for Educational Leadership provides external quality assurance to the process.

Part 2: Some principles for a revised programme

Before proposing revisions to the programme, it is important to state some principles both for the programme itself and for the organisational context in which it operates.

The purpose of the NPQH

The NPQH should be a prestigious and trusted qualification. It should indicate the suitability and preparedness of an individual teacher to lead a school in all its aspects with appropriate support.

The award of the NPQH welcomes an individual into the headteacher community of Wales and bestows an expectation of the furtherance of education in Wales through ongoing collaboration. While the custodian of one school, the headteacher will seek to develop themselves and others through professional development.

One important purpose of the qualification should be to re-assure the employing authority that the individual has demonstrated a sufficient level of professional understanding and competence to be entrusted with the leadership of a school with the expectation that they will continue to develop as leaders with the right support.

Anticipating the context of the first headship

While all headteacher posts are open to applicants with qualified teacher status and the NPQH, it is more likely that first time headteachers will find themselves in a limited proportion of the 1500 schools in Wales. Many schools are seen generally, including by the

teaching community, as needing a person with prior experience of headship. These include the largest schools, those with a history of challenge and difficulty and those with a reputation for high standards and quality: in all these cases the reality is that the appointing body is inclined to seek evidence of headship success elsewhere rather than place their school at perceived possible risk.

This does not mean that there is a natural or assumed ladder of headship progression. Some headteachers find immense satisfaction within a small school setting, remaining in post for many decades (sometimes leaving an appointing body nervous about entrusting their stable school to inexperienced leadership). There are other scenarios where a school has had significant difficulties over time with a succession of experienced headteachers unable to meet the challenge and the appointing body turns to the untried and untested in hope as much as conviction.

In normal circumstances, however, the features of the projected first headship school destinations of the majority of any cohort are relatively predictable.

Contributors to the review often based their comments about the purpose of the programme on the challenges that the new headteacher often meets:

- age range or subject discipline limitation, inexperience or unfamiliarity compared with their background. This can reflect their 'route' to headship such as the pastoral route in schools or entry to leadership from other arenas in education,
- the destination school being smaller than the school that the new headteacher has left,
- the leadership team being directed in the new school, is often smaller than the one that the new headteacher was a part of immediately prior to appointment,
- stepping into the domain of the previous post holder with mixed appreciation,
- a new or different community around the school,
- working through others,
- governance structure and practices,
- levels of confidence over inspection,
- understanding the bigger picture or schooling in Wales.

As far as possible the revised provision should be rooted in the anticipation of where the newly appointed headteacher will find themselves and the sorts of challenges they will face.

What would we expect from each new cohort of headteachers?

We would want new headteachers to possess:

<u>Knowledge/understanding/appreciation.</u>

a clearly articulated view of what good schooling can achieve and be assured that they are committed to the Welsh Government's ambitions for children and young people in Wales.
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a broad understanding of the 'big picture' of schooling, recognising how and why the system is as it is and how it has developed over time.

a sharp appreciation of the achievements of the school they inherit, be aware of its shortcomings while sharing with colleagues a commitment always to improve.

a clear understanding of the structure of the education system including how the various tiers of decision-making interlock and the importance of the role of headteachers in influencing policy.

an appreciation and experience of ways to engage with the wider school community, including governors, parents/carers and community leaders to the benefit of children and young people in their school.

a clear understanding of how to develop provision and opportunity for pupils with Additional Learning Needs or who have experienced especially adverse circumstances in early childhood or adolescence (ACEs and AAEs).

a knowledge of how to use data and other evidence judiciously and to good effect to influence learning through adjustment to policy and practice.

an understanding of the technicalities of the management of finance, human resources, premises and safeguarding in order to lead a school effectively and efficiently.

a rich and growing understanding of the world of educational research and theory, which they would apply to the considered leadership of their school.

the capacity to cope with the unexpected and know who to turn to in a crisis or emergency and be relied upon to enact corporate procedures.

Commitment

a commitment to the promotion of the Welsh language and culture.

a clear commitment to equality and equity for pupils, staff and the community of their school while avoiding practices detrimental to other schools and an appreciation of school organisation practices that affect equality and equitable outcomes.

a commitment to influencing the culture and effectiveness of learning especially through pedagogy, and also through the broad policy decisions linked to the use of people, time, space and resources and through their influence on the teaching and learning culture in classrooms and other learning settings both in school and elsewhere.

a clearly articulated view of what good schooling can achieve and be assured that they demonstrate a strong moral commitment to the Welsh Government's ambitions for children and young people in Wales.

Disposition and willingness

a willingness to use disciplined innovation, seeing alternatives to the routines, processes and practices that have been prevalent in their experience to date – in short, a familiarity with, and experience of, introducing complex change effectively.

an outlook which sees collaboration as an essential aspect of their approach: encouraged within their school and embracing opportunities with others.

Current capability/proven skills/ability

a proven ability to work through others, particularly senior colleagues to secure the ambitions of the school.

the ability to develop coherent strategic plans with the capacity to adapt and amend depending upon circumstances without losing sight of the goal.

highly developed skills in the critical areas of communication - presentation, decision-making, negotiation, problem-solving and report writing.

It is an extensive list and no short programme can possibly prepare an individual for every sort of challenge ahead. The fortunate entrants to headship will have worked with supportive headteachers who opened up possibilities in terms of professional experience, a local authority and regional consortium which offered structured opportunity and their own inner drive to explore effectiveness in schooling since their Initial Teacher Education... and a well-designed NPQH programme giving them understandings, skills and knowledge coupled with confidence to take on the challenge.

The essential features of the revised NPQH programme

The NPQH programme needs to be seen as a composite experience where assessment informs the learning agenda for individuals as well as determining their suitability for qualification.

Those entering the programme believe they are entering a new sphere of professional responsibility and experience. Essentially, the programme that prepares them should, as far as possible, be forward-looking and focused upon activity that will equip them for the role they anticipate.

The central features should be:

A chance to lead:

Prospective headteachers should have been exercising leadership within their previous and current formal leadership roles and annual developmental conversations around the Professional Standards for Leadership should have been helping their skills and qualities to develop. In preparation for headship, candidates should have opportunity to be deeply involved in solving leadership problems in their current school and elsewhere.

Feedback built in:

As they are involved in genuine leadership tasks solving genuine problems, feedback is essential at every stage on their approach to leadership in respect of the task, the team and the individual.

Feedback is the vital and central tool in the candidate's experience of the NPQH and all involved in programme provision should be adept in necessary skills.

Guided exposure to a range of leadership contexts:

Most candidates will find themselves in a totally new and probably different context when moving to their first headship. Even those appointed internally, after a period of acting headship or from deputy headship, will experience a different set of working relationships when appointed to the permanent role.

All will need to have awareness of a range of school settings and situations, assessing opportunities and problems and observing approaches to them. Without seeing high quality, successful practice, there is the risk of recycled mediocrity. With access to successful and excellent practice without opportunity to interrogate the foundations that secure such outcomes, there is the risk of rationalisation or frustration. This means that consideration of varying contexts needs to be structured and analytical with evaluation and feedback as essential features.

Access and engagement with leadership case studies and theoretical perspectives:

Good practice in leadership develops from understanding detail within the context of bigger pictures. Candidates need exposure to alternative models, constructs and approaches in aspects of schooling in order to gain perspectives that they can apply in different and new professional surroundings. The habit of engaging with relevant literature and research needs to be sustained and extended.

Opportunity to engage in deep and challenging discussion with colleagues:

Prospective headteachers should build professional networks with colleagues locally, nationally and globally which will push their thinking and sustain their professional intent. Those networks should extend beyond their own career cohort and should provide

opportunity to engage with more and less experienced professionals in similar and different settings.

An awareness of the managerial responsibilities that will be incumbent upon them:

While they cannot prepare for every eventuality, candidates should be versed in procedures and aware of legal responsibilities. While this agenda is vast, new headteachers need to know what one headteacher engaged with the review called, ‘the things I must not get wrong’.

An unswerving focus upon improved pupil outcomes

Candidates should develop clarity about the extent to which the dimensions of effective leadership and leadership capabilities can have impact on pupil outcomes. This is an absolute imperative for headship in Wales and candidates need to be supported in recognising their responsibility and the strategies that they can employ to the benefit of all pupils within their own school and beyond.

Responsibilities in the development of leadership capacity

Preparing for headship is neither an episodic event nor passive. Most teachers need support over many years to develop a readiness for headship.

Access to provision for leadership development should begin at a very early career stage. Indeed, students in Initial Teacher Education should be aware of how the school system works and how school leadership operates. That provision should be available in the form of modules of professional experience that reflect the National Approach to Professional Learning for Wales¹⁷. In this regard, the current Middle Leader and Senior Leader programmes and indeed a programme for new and acting headteachers (all endorsed by NAEL), are strong recent developments and, over time, will build a coherent and responsive pathway for leadership development.

Through such experiences, allied to good career opportunities in schools in which they work, supported by positive headteachers, it should become apparent to the individual that they are nearing the point where headship is a natural step in responsibility and contribution to education in Wales.

The first responsibility lies with the individual. From the outset in ITE, the Professional Standards emphasise leadership and effective professional development conversations with informed and supportive mentors should begin the process of enabling leadership expertise to grow. From induction onwards, the individual should seek opportunity to extend

¹⁷ National approach to Professional Learning (2018) <https://hwb.gov.wales/professional-development/national-approach-to-professional-learning>

leadership experience and be enabled to do so by a profession that seeks and nurtures talent.

Professional learning, collaboration and innovation have to be helped to become habits of practice and the individual has a responsibility to take the lead and seek support to extend their understanding.

If the first responsibility lies with the individual, then the headteacher community of Wales is a key influence. One of the joys of headship is that of nurturing talent and enabling individual teachers to enjoy fields of experience that they previously imagined to be beyond their compass. This is more than ensuring the annual professional development conversation is positive. This is about seeing the right person take the right opportunity at the right time, scaffolding experience to make the unfamiliar accessible and build confidence: much like good teaching and the hallmark of good, personalised mentoring. Brief examples of the sorts of leadership experiences that could be provided as part of evolving work in school are provided at Appendix A.

Some schools are historical leadership development machines. They are developmental centres where teachers catch experience and flourish with responsibility and influence. The review saw examples of schools that engage all teachers systematically in leadership aspects of the school. In these schools, engagement with the workings and development of the school beyond their classroom is seen as natural and a key to all staff understanding the thinking behind decisions and the coherence of strategy. There should be no reluctance on the part of schools to offer examples of their effort in this regard and the organisers of the programme should actively seek out ways to use the effective leadership development practice and expertise in schools, in tune with the professional standards on innovation, professional learning and collaboration.

The headteacher community has a wider and vital role: that of promoting headship as enjoyable and rewarding. While the role may be at times exhausting and drain every reserve of energy, the rewards are many and gained through affecting positively the life chances of children, young people and colleagues – in short, being part of the achievement of others over time and seeing the development of the school as a learning organisation in its fullest sense.

One of the descriptors for the leadership standards states that *'Optimism prevails and is reinforced with the resolve to ensure the achievement of the four purposes is a reality for all schools'*. It has been hard to be optimistic over the last few years but at the heart of education is a belief in the future and this need to both value our role and carry others with us is fundamental to professional worth.

As one very experienced and respected headteacher told the review:

I feel that we as headteachers may have given a negative impression of headship and this has resulted in some seeing the role as a difficult or an unappealing one.

I will reflect on how I and others promote the role, because I'm thrilled to have been appointed as a headteacher, passionate about education and know that we make a huge difference. We need good, enthusiastic leaders and we as headteachers have a duty to ensure that we paint a positive picture.

Agencies and organisations connected with the school also have a significant responsibility. This includes the local authorities, regional consortia, NAEL, Higher Education, diocesan authorities, EWC and Estyn who each influence the ways in which teachers grow and develop, building leadership qualities and readiness, in some cases, for headship. While this might encompass specific provision in the form of professional learning experience or training, it also includes the building of confidence through effective support mechanisms and the opening of understanding to a wider agenda.

In particular, how inspection frames leadership after covid will be crucial in determining the appetite for headship in potential leaders of schools. There is a sense of waiting to see how far the recommendations of 'A Learning Inspectorate'¹⁸ are taken forward. There is broad support for the education reform agenda though inspection remains the indicator of how far the system is moving away from the previous high stakes accountability regime and towards a genuinely collaborative outlook with schools seen as learning organisations¹⁹. Estyn's influence is felt way beyond individual schools and is seen by many as one of the key determinants of whether potential candidates will take the step towards headship.

Many recall the era when external agencies were part of a high-stakes accountability agenda and, while priorities have changed significantly, the agencies need to promote consistently and effectively the added value they can bring, individually and collectively, to the work of the school. The danger of them being seen as the burden of the 'middle tier' pressing down on each school will undermine enthusiasm for headship.

The Welsh Government is committed to a NPQH and supporting teachers as far as possible with professional learning that prepares them for the role. This means ensuring provision of the highest quality, effectively co-ordinated and quality assured.

The national mission²⁰ has gained traction and is one of the factors that is re-energising the school system after the pandemic. Schools need to believe that they are partners in the

¹⁸ Donaldson, G. (2018) A Learning Inspectorate: Independent review of Estyn. Estyn Available: <https://www.estyn.gov.wales/system/files/2022-01/A%2520Learning%2520Inspectorate%2520-%2520en%2520-%2520June%25202018.pdf>

¹⁹ OECD (2016) What makes a school a learning organisation? A guide for policy makers, school leaders and teachers. Available: <https://www.oecd.org/education/school/school-learning-organisation.pdf>

²⁰ Welsh Government (2017) Education in Wales: Our national mission. Action plan 2017 – 21 Available <https://gov.wales/sites/default/files/publications/2018-03/education-in-wales-our-national-mission.pdf>

Government's agenda and effective headteachers, existing and future, are fundamental to success.

The Government therefore can enable effective preparation through strategic direction and the management of resource. The Professional Leadership Standards, Curriculum for Wales, establishment of National Academy for Educational Leadership, the National Approach to Professional Learning²¹ and the National Strategy for Educational Research and Enquiry²² are examples of strategic work to secure the four enabling objectives in Our National Mission. The importance of the NPQH and preparatory programmes in achieving the objectives within the education reform agenda cannot be over-stated.

There is recognition that there could be a community of support across the system which could be engaged in enabling potential headteachers to develop the expertise and confidence to take on a first headship successfully. The process of support will be more effective if it begins at an early career stage and continues well into the first appointment.

The programme and the qualification for the NPQH have to be of the highest standard possible, seen as prestigious and of benefit to headship and the nation.

The place of professional standards

One of the big changes anticipated in the review of Professional Standards for Leadership in 2017 was that they were to be part of a developmental rather than judgemental process. The revision was a means of demonstrating the Government's commitment to the principles of the recommendations of the Successful Futures²³ report.

In the 2017 review of the Professional Standards for Leadership, the number of standards was reduced from 55 to 5. The descriptors are intended to be prompts for consideration in developmental review to broaden perceptions, highlighting strengths and needs. The current NPQH programme and the assessment centre both focus on descriptors as a vehicle for evidence of readiness for headship and qualification. In that way they are being used in a judgemental manner.

It is entirely appropriate to use the Professional Standards for Leadership as a touchstone within the NPQH programme but they should not form the entire focus.

It was always acknowledged in the working groups developing the standards that a headteacher would need to be competent in many technical aspects of the management of their school: budget, premises, human resources, health and safety, safeguarding, race

²¹ Welsh Government, National approach to Professional Learning (2018) <https://hwb.gov.wales/professional-development/national-approach-to-professional-learning>

²² Welsh Government (2021) The National Strategy for Educational Research and Enquiry (NSERE): vision document. Available: <https://www.gov.wales/national-strategy-educational-research-and-enquiry-nsere-vision-document>.

²³ Donaldson G. (2015) Successful Futures. Independent Review of Curriculum and Assessment Arrangements in Wales. *Crown Copyright*.

relations, community engagement, union relationships and so on. The working parties who produced the standards were keen to emphasise the role of leading learning, with a descriptor expecting heads to be competent in managerial aspects.

While the descriptors for each standard, particularly the leadership standard, make reference to the leader being adept at managing resources they do not itemise specifics. The reason for this is twofold. First, the technical requirements should be the focus of training by appropriate bodies from time to time with the assumption that leaders would be capable and supported in implementation. Second, the priority technicalities would change over time as new requirements are introduced and the descriptors would therefore require too frequent updating. For example, the expectation that headteachers would be able and expected to follow guidance on pandemic related procedures was neither anticipated nor questioned at the time of need yet no standards would have listed that expectation except in generic terms. The descriptor within the leadership standard refers to 'exercising corporate responsibility in all colleagues' and that 'policies, whether school, local or national, are checked for compliance in practice and any shortcomings are addressed'. The same descriptor talks of 'ensuring efficiency and regulation does not intrude upon vision but reinforces its effectiveness.' The assumption was that expertise on aspects of management should be available when the abnormal was experienced.

The documentation that accompanied the revised Professional Standards for Teaching and Leadership proposed that descriptors should be reviewed periodically to take account of evolving priorities in the Welsh education agenda. This would see those issues that have become prominent being accommodated and those which have taken a back seat could be jettisoned. An example of the former would be the growing recognition of well-being as an important issue since 2017 when the conversation at the time was about work-life balance, staff cohesion and teamwork. Revised descriptors might take account of well-being within the leadership standard. Any revision might lead to consideration of some descriptors within the pedagogy standard which, in 2017, reflected the concerns about high stakes accountability through inspection and a focus upon detailed aspects of classroom practice.

Importantly, when the Professional Standards were designed, there was broad agreement that there should not be separate descriptors of leadership for each career stage. Leadership was envisaged as growing in according to circumstances, opportunity and challenge, rather than a linear and incremental fashion, encouraging leaders at all stages to embrace opportunity as it arose and to learn from it. The professional pathway has contradicted this by creating by default a series of steps subdividing leadership experience by stage. This may have been a good starting point but the path to leadership needs to be broader and shorter with people enjoying the crazy paving of development rather than the hopscotch of advancement. The NPQH might be a specific provision as people approach headship but the experiences that support that readiness should be career long and enabled by a responsible schooling community.

Assessment and headship appointments

The achilles heel of the current programme lies in the assessment. There persists the impression that some candidates who are successful are not sufficiently worthy. Assessors talk of their reservations and the process allows people to revisit the assessment centre experience until they are successful (though very few return more than once). The assessment centre is robust in its management and fairness but is weighted in favour of success. It is easier to allow candidates to achieve the NPQH and leave their future to the rigour of the school appointment process. Hence, the purpose of the qualification in identifying those that are judged as prepared for headship is undermined.

Because of this, individual school appointment procedures are often complex analyses and tests of individual competence when they should be the opportunity for appointing bodies to select from qualified and assumed competent candidates, the person who best fits their school and community. Appointing bodies should not need to determine whether any candidate is appointable but should be focused upon securing the most suitable for their school in terms of previous experience, ambition and affinity with the issues of their community.

This will not change until the qualification is seen as highly credible which means using the entry point to the new programme as the key assessment point. This assessment should be used to determine need as well as projected suitability for headship and the programme should be tailored to the individual with further assessment used to provide feedback which influences leadership behaviours. The initial assessment would also be a point at which some candidates can be counselled away from headship and into other appropriate avenues of professional development. The assessment on entry to the NPQH programme should be rigorous and demanding and it should be assumed that the candidate's suitability for headship will be verified through their experience on the programme.

Individuals verified and holding the NPQH should be seen to be worthy of entering a guild of headteachers, committed to working together to secure the nation's educational prosperity and able to lead a school. All concerned have to see the NPQH as prestigious and high quality.

Supply, demand and quality

Quality has to drive the NPQH programme. There will always be a tension between ensuring a sufficient supply of new headteachers and ensuring that the qualification is robust. A rigorous assessment to ensure quality ensures that only the best candidates are successful and available but if the supply does not satisfy demand, there are problems. However, reduced quality will lead to the NPQH being a damaged brand and lead to an irretrievable lack of confidence. For that reason, the bar should be consistently high with an emphasis on quality with the recognition that, should minor shortages occur from time to time, short term measures can be used to overcome them.

The prospect of a programme being able to prepare an individual for every eventuality in headship is unlikely. For instance, we know that many very experienced headteachers were sorely tested by the Covid-19 pandemic and, to their credit, sustained their school communities through the uncertainty. The NPQH programme cannot possibly prepare future leaders for every eventuality. However, the programme and qualification can go some way to building a future headteacher's capacity to cope with uncertainty, deal with the unexpected and handle emergency. They are part of leadership in most employment sectors and, while some skills can be learnt and contextual awareness developed, the headteacher in a school needs to be confident that external systems are in place to support them in times of need. There is therefore a responsibility on other agencies to ensure that their systems and processes are effective in supporting all headteachers, and particularly the new ones.

Part 3: The revised programme and qualification

Leadership, organisation and management of the programme

Recommendation 01

The NPQH should be a single national programme provided and recognised under the auspices of government.

It should help suitable individuals to acquire and consolidate a range of understandings and skills over an extended period of time.

In the career prior to appointment to headship, an individual will have gained experience which will have prepared them to a significant extent for the role. While anyone changing role or moving to a promoted post has to adjust to that role, the intention should be for the step to success in headship being seen as attainable on appointment and secure by virtue of continuing and well-used support.

For many though, the step to headship is seen as a giant leap. While other promotions on the leadership pathway are seen as a natural increase in responsibility, the step to headship is seen by many as steep and a daunting proposition. Other promotions entail increased expectations and adjusted responsibility whereas the step to headship is seen by many as shedding one role and starting another with a distinct change of focus within the job and different responsibility priorities.

There is a range of options for the organisation and leadership of the programme on a national scale. In managing the programme, a balance needs to be struck between the security of a national framework, the intimacy of a regional and local connection with the individual and the candidate's clarity of purpose. This means that the programme can be presented by a network of organisations but under a central umbrella, rather than be 'market driven' with agencies in competition with each other.

Being a national programme does not imply the assessment driving the syllabus on a metronomic timetable. The programme needs to be a set of experiences which relate to the individual's needs, making full use of the collaborative possibilities of the cohort and the variable contexts of the nation's schooling. It will need flexible co-ordination and leadership in a dynamic framework enabling cohorts to benefit from a nuanced and differentiated programme.

As such, while the programme could be managed and provided centrally by a core team and aspects of franchising or licensing could ensure quality and consistency in a way that is different from and adds to that achieved by rigid adherence to procedures. A range of agencies will need to be included in the programme and, essential in the organisation, will be the co-ordination of their contribution to ensure a rigorous and rewarding candidate experience.

Recommendation 02

The organising body should articulate the clarity of purpose for the qualification and build the experiences and assessments, mechanisms and materials to make the programme as effective and economic as possible using expertise from a range of collaborating agencies of government and other providers.

The organising body should ensure that the programme embraces contribution from a range of partners including agencies of government and commercial organisations. Agencies of government include schools, the National Academy for Educational Leadership, regional consortia, local authorities, Higher Education and Estyn as well as the Welsh Government itself. Such organisations should contribute to the programme in a co-ordinated fashion to offer a coherent and robust experience to each candidate in line with the expectations and aims of the programme.

Transition to the revised programme should be staged over two years, gradually increasing new elements. Candidates can be allocated to appropriate aspects of the transitional programme based on their evident experience and need, offering access to developing elements of the new programme. This will avoid a shortfall in available applicants for headship and allow time to develop materials of high quality.

In the long term, the programme will fuse with experiences for teachers earlier in their career so that the need for sharply differentiated provision at successive career stages will reduce.

Quality Assurance and the ongoing effectiveness of the programme

Recommendation 03

The National Academy for Educational Leadership should assume responsibility for the quality assurance of the programme. This should include moderation, evaluation and on-going modification to content.

This responsibility should go further than endorsing the programme proposal against a set of agreed criteria and should include moderation, surveys, evaluative interviews with participants and on-going modifications. All elements of the programme should invite feedback from each participant in order to enhance the provision periodically.

The Academy is ideally placed to exert strong strategic influence. Co-ordinated by the Academy, the Associates group of headteachers from across the country should work to ensure quality in all aspects of the programme and, through their networks with colleague headteachers, determine the aspects of the changing nature of headship which should be considered in bi-annual reviews of content.

The National Academy for Educational Leadership should consider engagement with a strategic oversight group involving appropriate stakeholders such as representatives of Welsh Government, local authorities, regional consortia, Professional Associations and Unions, Estyn, EWC, university representatives and other participants to suggest and challenge proposed developments to the programme and part of the bi-annual review.

In this way, the content of the programme should evolve, ensuring and enhancing quality and building confidence and credibility in the value of the qualification.

The provision of the formal NPQH programme supplements structured and incidental, career-long leadership experiences and these are gained in schools. The quality of leadership and the programme itself need to be supported by agencies of government helping to build credibility and supporting leadership development. Schools also need to believe that their role in developing leadership is vital in terms of the national agenda.

Recommendation 04

Estyn should evaluate the effectiveness of the school's support of all staff for leadership development as part of school inspection. That is, the extent to which the headteacher and governors deliberately and strategically enable teachers at different career stages to accumulate and use leadership experiences.

This would shift the emphasis upon leadership from headteacher effectiveness and the capacity to delegate and hold staff to account and focus instead upon the strategies used to enable experiences and opportunities across the school. This is different from checking whether teachers are carrying out effectively their delegated responsibilities and involves enquiring into the extent to which headteachers and governors provide opportunity for teachers beyond their current compass: the participation in a staff appointment, observation at a governor committee, contributing to a budget decision, and so on. In due

course, the effectiveness of in-school leadership development could be a focus for a thematic inspection with the intention of highlighting good practice.

Programme structure

The NPQH programme should be seen as an important part of the support available in transition to successful headship. It should be seen as the formal programme offering a structured opportunity to supplement other experiences, including on-going support towards appointment and beyond.

Recommendation 05

The NPQH programme should be of two years duration and end with verification.

The NPQH should be a coherent programme of preparation for those expected to be ready to take on the responsibility of headship in Wales following the two years and successful completion.

Once accepted onto the programme, candidates will have their qualification verified subject to them completing all required elements of the programme to a satisfactory required standard and being able to evidence their progress in anticipation of headship.

The NPQH should be a verified qualification for the individual on completion of all requirements.

Candidates should be expected to complete the programme within two years. The programme involves around 80 hours of blended learning experiences. The candidate's home school should anticipate them spending 60 hours on the programme and much of that will be of benefit to the school. To secure qualification should require the completion of a number of modules, some of which are compulsory, some elective based on an audit of strengths and need.

Where an individual fails to complete required elements to a satisfactory level within the allotted time, the NPQH will usually be void and the candidate required to apply to begin the programme again. In exceptional circumstances, an extension could be granted but not beyond a four-year maximum term for the programme.

Elective elements would be available throughout the duration of the programme and beyond, open to all headteachers subject to any limit on numbers, where NPQH candidates would have priority.

Access and recruitment to the programme

Recommendation 06

Each candidate should access the programme through an assessment centre process.

The NPQH programme should recruit twice yearly with programmes beginning in May and October. In the long term, the ambition should be to have entirely flexible entry and departure points which will be less complex in arrangement and more focussed on meeting the needs of candidates in terms of professional learning experiences that run continuously.

The assessment centre for access to the NPQH programme should run four times each year with successful candidates allocated to the next available cohort. The NPQH should be available to all who are able to meet the criteria for entry at the assessment centre, subject to availability of places.

It should be assumed that candidates successful in being accepted onto the programme should be ready for headship within two years and they should complete their programme to a satisfactory required standard in that time.

All assessors should be trained and the assessment centres organised, as now, to ensure no conflicts of interest.

Verification of the NPQH after two years

Each individual must complete, to a satisfactory standard, the required discrete elements of the programme identified in their schedule in order to have their qualification verified. The summary verification process should be a review with assessors of the candidate's progress over the programme as evidence of the developed and confirmed readiness for headship.

The required elements should be tightly specified and controlled with clear assessment criteria and there should be moderation of all assessments to ensure parity.

All elements of assessment should align with The Professional Standards for Leadership which will provide the touchstone for the programme's effectiveness.

Eligibility of people from outside of Wales for the NPQH and appointment to headship

For individuals who are serving headteachers from outside of Wales without the NPQH or, for Acting Headteachers upon appointment to substantive posts in their current school, there should be an evaluation and audit with an expectation that the NPQH will be verified within five school terms. For example, those from other jurisdictions need to be versed in the Welsh Education Reform agenda.

The same applies to those with the NPQH from other jurisdictions who are not yet serving headteachers. While they can use their NPQH as evidence of extended professional learning, upon appointment they should be entitled to an audit of need with the express purpose of enabling them to feel confident that they will be well prepared and supported in taking on the role for which they have applied. In some cases, the individual will benefit from completing some required elements prior to taking up their post after appointment.

Such an audit process will also identify any exemptions from some of the required elements that may be appropriate in the case of serving substantive headteachers or in the case of those with extensive experience in other sectors such as inspection or school advisory work.

Headteacher supply and continuing eligibility

While the EWC keeps the register of individuals with the NPQH, it is not commissioned to track the whereabouts of those with the qualification. Nor is there any accurate prediction about the number of headteachers needed annually.

There is plenty of estimation of future need and, for some time, anecdotal warning of problems ahead but this is unreliable, not least because there is little follow up to check the accuracy of predictions. In 2022, just 50 headteachers were recorded as leaving their post for retirement or to move out of the profession²⁴. A further ten headteachers moved to other roles in education. The predictions that consistently serve as warnings of shortage along with the strongly emphasised pressures on headteachers potentially discourage candidates for headship. However, the predictions are often unsubstantiated or unreliable, using data which is statistically not significant, and the warnings risk over-statement.

In spite of the warnings about the perceived lack of attractiveness of headship, especially after the impact of covid, the number of applicants for the NPQH programme (145) in 2023 exceeded the average of the previous five years²⁵.

It is not that the surveys are wrong or not needed but what is needed are follow up data which accurately predict the level of need over time. At present, data are collected by various agencies but remains uncollated or analysed at national level.

There is currently no available register of holders of the NPQH at local authority level, albeit the School Workforce Annual Census does collect school level information on individuals who hold NPQH and the date of its award and a central register is held by EWC. Tracking of individuals is not required or practised and knowing who might be qualified and available for headship or acting headship is left to hearsay. This position is rationalised with recourse to GDPR compliance but successful applicants could be asked to give permission for details to be logged.

Recommendation 07

The EWC should be asked to use the central register of all holders of the NPQH to track their development over seven years. The emerging data should be used to inform future programmes and policy as well as support local authorities in their recruitment efforts.

²⁴ Source: SWAC

²⁵ Source: NPQH organisers

The continuing eligibility of the NPQH

There is a significant issue related to the number of people holding the NPQH but failing to apply for headship. In some regions, particularly in rural Wales, all serving secondary deputy headteachers possess the NPQH but show no indication of applying for vacant headships, sometimes declining the invitation to take on an acting headship where need has arisen. At the same time, prospective future candidates are denied access to the programme on the grounds they have not reached deputy headteacher status, which is not available to them. The effect of this is to create a situation where there will be few applications for headship in schools in the area with the further assumption that it is the post that is unattractive.

Recommendation 08

If, at the end of the four years after the award of the verified NPQH, the individual has not applied for headship, the qualification should lapse. Exceptions due to extenuating personal circumstances should be permitted and approved as part of quality assurance processes.

This process should happen retrospectively. The register of all current holders of the NPQH should be scrutinised by EWC and, with due notice, the qualification of those beyond the four-year limit will be deemed to have lapsed.

The clarity that the register will bring should inform analysis of the present situation, recruitment strategies and programme provision all of which is lacking at present.

Programme content and approach

There is evidence from the review that the time is right for a significant review of the content and approach. As the National Approach to Professional Learning becomes embedded and the leadership pathway becomes more well-trodden, the preparation for headship can become more sophisticated within a coherent agenda. The number of people following the programme as access to a professional learning opportunity is reducing as other programmes such as the National Masters in Education have become available. Similarly, the National Professional Learning Entitlement²⁶ is beginning to take hold and successive cohorts of leaders coming forward for the NPQH should see coherence between their unfolding professional learning and their preparation for headship.

The revision of arrangements for the NPQH should include clarity about what constitutes the qualification itself and how the programme should be structured. At present too many see the programme as a course to be travelled in order to gain the qualification rather than a conscious preparation for a first headship, verified by qualification. As with any qualification, the value is defined by the participant based on the challenge it represented in

²⁶ National Professional Learning Entitlement: Impact Assessment (2022) <https://www.gov.wales/national-professional-learning-entitlement-impact-assessment>

achievement. There is evidence of the intrinsic value of the content of the current programme being diminished by the focus on the assessment centre as the culmination.

For these reasons, the structure of the programme should change with the content aimed at enabling candidates to succeed as headteachers in the knowledge that they are deemed to be suitable for the role. The assessment should therefore test suitability for entry to the programme.

Recommendation 09

The significant point of assessment for the NPQH should be at the beginning of the programme. Following rigorous assessment, the successful candidates should be seen to have gained the NPQH (provisional) with verification occurring at the end of a two-year programme, subject to them completing all required elements of the programme to the required standard and demonstrating progress in preparedness.

Suitability for the NPQH should be based upon application and upon the candidate's evidence of

- a successful career experience to date
- QTS
- evidence of significant development on all Professional Standards for Leadership
- positive references from the current local authority or regional consortia
- a 360° feedback exercise and a formal supportive interview.

The interview should focus upon the candidate's commitment to the Welsh education agenda and their positive and developmental response to the results of a 360° feedback exercise.

This process will also serve as an audit of leadership need, which will form the basis for the selection of further required elements from the elective elements.

Support for candidates

Each candidate will be assigned a leadership coach whose role it is to guide them through the programme, advise on required elements and agreed electives, refer any difficulty to the programme leadership and organise and lead seminars and activity sessions for a group of candidates. The effectiveness of the leadership coach is key to the success of the programme. It is widely recognised that leadership coaches gain professionally from their involvement and effective training will be beneficial for the coaches in their own school settings.

Recommendation 10

Leadership coaches should be appointed to the role on the basis of clear criteria. They should be invited by application and committed to online training and briefing. Regular observation and moderation sessions should be a feature of their involvement.

The criteria for allocating candidates to leadership coaches should be articulated to both parties.

The candidate should be able to ask for an alternative leadership coach, at the outset, due to conflict of interest. The candidates should be provided with a summary of the experience and qualification of their coach and a summary of ways in which they could support aspects of their professional work linked to the audit.

Recommendation 11

Leadership coaches should work with a group of a maximum of eight candidates. The role and responsibility of the leadership coach should be carefully specified and articulated and should include oversight of each individual's progress through the programme and producing timely reports. Some elements of written 'coursework' will be assessed by leadership coaches not connected with the candidate to enable moderation.

The content of the programme

As an individual reaches the point where they apply for the qualification, they should be able to demonstrate their suitability for the role of headteacher based on accumulated positive use of professional learning experience in their career to date and a personal commitment to their own preparation for headship based upon aspiration for schooling and professional curiosity.

The programme should be active and practical where possible, immersing candidates in leadership with the expectation of feedback being provided from which they will articulate learning and act. At the same time, the demands of leadership require robust interrogation of theory and practice. The programme should be based in empirical evidence and engage candidates with theoretical perspectives in tight connection with applied and practical work.

If we want our headteachers to be as prepared as possible for their first post, it follows that some aspects of our expectations can be developed through a short course of instruction, some through deep and sustained study, some through reflection on experiences to date and some through exposure to experiences and circumstances that widen horizons and anticipate the context of the first headship.

The programme expectations

Recommendation 12

The programme should comprise required elements and elective elements.

The programme should carry significant electives on the leadership circumstances of specific types of schools, such as:

- Welsh-medium schools
- schools of a religious character
- schools of a multi-ethnic character
- special schools
- small schools
- all-age schools
- schools in rural areas
- schools in federations

The programme organisers should work with universities to match suitable elements of the NPQH programme to modules of the National Masters Programme. Over time, credit transfer arrangements should be put in place to enable interconnection between the NPQH and university courses, including wider Masters qualifications, MBA and qualifications specific to other employment sectors. This might see suitable candidates being deemed exempt from the requirements of some elements of the programme.

Similarly, the successful completion of the Welsh Government funded ILM Level 5 in Management programme²⁷ and the like (endorsed by NAEL) could be incorporated into the initial assessment and audit process and aspects of these programmes could exempt candidates from appropriate required elements of the NPQH.

Prospective candidates should see synergy between arenas of leadership development with every effort being made to use positively their professional learning experiences whether self-determined or provided for them. The NPQH assessment at the start of the programme should be able to take account of endorsed provision and enable flexible pathways towards the NPQH.

The programme: what candidates will do and learn about

The *required elements* of the programme content should be:

- ❑ **A comprehensive analysis of the Welsh Education Reform agenda, where feedback will address understanding and awareness of how various policy developments affect practice in school.**

²⁷ Delivered in schools by Portal Training which aims to develop management and leadership skills techniques through a mixed assessment approach. Endorsed by the NAEL.

- ❑ A significant analysis of the issues of equity, in particular ALN, ACEs and AAEs²⁸, *with feedback on the extent to which schools need to respond positively to the needs of all pupils.*
- ❑ A 'live' school improvement project, supporting another school and carried out in collaboration with another colleague on the programme and supervised by the leadership coach and the host headteacher. *Feedback should focus on analysis, use of data, problem solving, strategic planning, innovation, communication and monitoring.*
- ❑ Attendance and full participation at six leadership coaching network sessions. This will involve preparatory reading, research or analysis. *Feedback should focus on understanding, critical insight, synthesising issues, skills of debate and argument.*
- ❑ Participation in an Estyn school inspection as a peer inspector, meeting all requirements in terms of preparation, involvement and follow up. *Feedback should focus on insight, observation, analysis, reporting, teamwork, contribution and influence on the perception of inspectors.*
- ❑ Engagement with the foundation programme on managerial aspects of headship, available and presented online. *Feedback should reflect the extent of knowledge of the legal and statutory expectations and boundaries and responses to a range of potential problems that headteachers can face.*
- ❑ Engagement with the programme on school governance and accountability. *Feedback should focus on responsibilities, duties and relationships.*
- ❑ Engagement with any elective deemed essential in the audit on entry to the programme. *Feedback should be structured to build upon the objectives of the specific element.*

In every element, the priority should be for the candidate to reflect on their experience to date, apply research perspectives, consider alternative practices and be able to articulate how they have and will change their approach and practice. This hinges on feedback being effective, welcomed and used. In this way, dimensions of effective leadership and vital leadership capabilities and their impact on pupils' lives will be explored, embedded and applied.

The candidate's current school should commit to making full participation in the programme possible. If the experience is used well, there will be considerable benefits to the 'home'

²⁸ Adverse Adolescent Experiences: with adolescence beginning at an earlier stage and lasting longer than previously, young people face risks to set against the opportunities of our age. Schools are major influencers in helping young people take responsibility for their own actions, a fundamental of the four purposes of the Curriculum for Wales.

school of the candidate both in terms of the extending leadership insight and skills of the candidate and the immediacy of access to contemporary policy developments.

For serving headteachers, the endorsement of a candidate for the NPQH (provisional) heralds a change in leadership relationship. Successful entry to the NPQH signals the departure of a dependable and successful colleague in the not too distant future. This will in due course bring fresh perspectives to the school but the awareness of change ahead can be unsettling. Local authorities can work with headteachers who have endorsed candidates to anticipate at an early stage how the school will negotiate the next few years. For the 'home' headteacher, supporting a close leadership colleague in their transition to headship can be one of the most rewarding professional experiences. The programme organisers should produce and make available outline advice and guidance for sponsoring headteachers (or sponsoring organisations) on both the expectations of the programme and the potential benefits for them and how they can best use the involvement to the benefit of their school.

Recommendation 13

Those taking part in the NPQH programme should be encouraged and expected to identify and follow elective as well as required elements of the programme that give them opportunity to experience some aspects of headship and purposeful engagement with the headteacher community. In doing so, they should be supported as much as possible by their current school in terms of flexibility to provide opportunity for engagement.

Appropriate elective elements would be identified through the initial assessment and audit process.

Electives

In order to reflect differing expertise as well as need and local priorities, a variety of elective modules should be available. The electives should be provided by a group of approved agencies, coordinated by the programme organisers, and should include school-based colleagues, local authorities and regional consortia together with universities and other training providers.

Some commercial organisations offer leadership programmes, often commissioned and provided by local authorities on behalf of their schools as a means to encourage professional learning and retention of key staff. Some of these programmes are very popular with participants though they often assume such programmes carry credit within the professional learning pathway.

Professional Associations and Unions offer well regarded programmes of training on aspects of leadership which can be accessed by members. The Catholic Education Service and the Church in Wales programmes are similarly well regarded and, while open to sub-sets of the

profession, should be considered as possible elective elements by those supporting the candidate.

It would be worth exploring how such programmes could reasonably be included in the elective elements of the NPQH programme with candidates guided towards those most relevant and available in their region. This would present challenges in terms of programme endorsement criteria, availability and cost but, with electives, the aim should be to maximise access linked to opportunity rather than limit availability because of equity.

The central issue is one of using the electives to meet the candidate’s personalised need and ‘navigating’²⁹ with them their pathway to the NPQH and headship.

The aim in creating the modular elective experience is to provide candidates with a clear and comprehensive structure, but with the freedom to choose with guidance, professional learning most relevant to them, at a time they need it. These electives might also be made available to serving headteachers, subject to availability in which case priority should be given to those in the early stages of their headship career.

These further bespoke elements of professional learning will be tailored to individuals to enable their profile to be secure and to address any areas of need identified through audit. A broad outline of some examples of the elective elements is outlined in Appendix B: Examples of elective elements of the programme.

The verified NPQH

Recommendation 14

For verification of the NPQH, all required elements should be completed to the expected standard and the candidate should be able to offer a summary of the progress made in developing their leadership capabilities over the course of the programme with reference to each of the five leadership standards.

Verification will note the application of learning in the context of the required elements of the programme. Verification processes should test the extent of the candidate’s development over the course of the programme and ensure that feedback has been well used as a means of reflection which will support effective approaches to leadership.

Recognition

Recommendation 15

²⁹ Harris, A., Hutt, M., Jones, M. and Longville, J. (2021) Independent Review of Leadership: Final Report. Available at: <https://www.gov.wales/sites/default/files/publications/2022-05/independent-leadership-review-nov-2021-en.pdf>. Section 3.13.1, page 19

Recognition should be conferred on candidates with the verified NPQH at an annual and significant celebratory presentation, open to all candidates and their guest, with high level representation from the Welsh Government.

The NPQH should be prestigious and, as such, it should be recognised in a similar way to the award of a higher degree. The acknowledgement of achievement through significant commitment, study and professional learning will also serve to demonstrate the belief that each candidate can be part of the national effort to contribute to the school system to maximum benefit for every pupil.

The first headship: encouraging application and the appointment process

After the verification of the NPQH, prospective headteachers should be guided and supported in considering their next career stage. Many of those who gain the NPQH seem to be uncertain about what they see as making a too early application for headship, recognising that there are many others with the qualification with potentially more experience. In due course, their inaction becomes an inhibitor when they perceive themselves as less viable than others with more recent qualification. This issue of self-confidence and hesitance over self-promotion might be explained as cultural but needs to be addressed or good people will be lost to the system. Student teachers in ITE and new teachers in induction need their ideas taken seriously and the profession needs to fire rather than quench leadership anticipation. This applies to those on the cusp of headship.

Recommendation 16

Those with the NPQH should be allocated a sponsor headteacher who will liaise with them over their next career step.

The sponsor headteacher should be an experienced headteacher who is prepared to keep in touch with the individual on a regular basis, drawing attention to possible appointments and, in confidence, discussing options and possibilities. This would include considering job descriptions and school circumstances in the light of the individual's career experience.

An obvious sponsor would be the headteacher of the school in which the candidate works but there may be considerable advantages in nominating additional headteacher support.

Recommendation 17

Headteacher appointment processes should accept the verified NPQH and be concerned with interviewing appropriate candidates on the basis of securing the best candidate for their school and community. The NPQH should remove the need for multiple tasks in a headship appointment assessment centre.

Over time, headteacher appointment processes have become more complex as local authorities and consortia have tried to support governing bodies in their work. Typically,

governors take their role seriously but, since they occur infrequently, few have much experience of headteacher appointments. Too often the processes of appointment have become so thorough as to be bureaucracy-led with the appointing body concerned with scoring systems as much as with the suitability of the candidate for their school.

Most headteacher appointments now take place over two days minimum, with an assessment centre forming a major part of the process for all candidates. Assessment centre activities vary but include exercises and tasks designed to test the applicants' ability to prioritise, analyse assessment data, scrutinise pupils work, deal with safeguarding incidents, manage budgetary decisions and so on. Applicants are also sometimes asked to lead assembly, chair meetings, hold discussion with groups of staff, pupils or governors with observers present.

While this type of process is comprehensive it can be counterproductive. For the successful candidate, there is re-assurance and confidence built on being successful in a gruelling process and having beaten all other candidates. For all other candidates, there is the sense of failure however great the usefulness of experience as learning for future reference. After two such experiences of non-appointment, it is likely that enthusiasm for application will diminish. This might be especially so when the candidate is applying for a post within their own community and likely to be assessed and interviewed by people to whom they are known. On a national scale, the time spent on assessment centre activities resulting in the rejection of the majority of candidates is not cost effective.

Analysis of job descriptions and person specifications for twenty recent appointments across Wales revealed a significant amount of duplication of generic requirements. While appointing bodies are advised well by Human Resource managers, appointment processes that are extended, thorough and detailed are also cumbersome, complex and managerial. A reliable NPQH should carry enough weight to convince appointing bodies of the credibility of verified candidates. The skills and aptitudes required for appointment should be included and validated in the required elements of the NPQH, rendering the need for repetition redundant. The appointment process for headship should be an interview in the true sense of the word: an expression of views between two parties, each determining whether the post is right for them. The headteacher job description should be largely generic with the person specification very focused upon the school and its community and explored at interview.

Recommendation 18

The validity and reliability of the NPQH should be accepted by appointing bodies as indicators of the individual's credibility and suitability for headship. The appointing body should accept this and limit their considerations to determining which candidate is best suited to their own school's circumstances.

The Welsh Government might consider a review of appointment processes and the roles of school governing bodies and local authorities.

This might include consideration of each local authority nominating at least three councillors who will be trained in appointment procedure and deployed to support the Governing Body at each headship interview.

This would provide security for the appointing school as the councillors help to moderate processes and become more experienced and adept at procedures. The insights they develop will help them to support schools within their local authority in a tangible way, working in partnerships with school governing bodies over their decision.

At the same time, concern should be shown for those who wish to become headteachers but have been unsuccessful in application for whatever reason.

Recommendation 19

Two years after verification, holders of the NPQH who have not secured a headship post should be expected to attend an updating programme annually as a condition of continuing registration.

Many with the NPQH, who are considering application for headship imminently, told the review that they would appreciate advice on appropriate posts for them. In other employment sectors, succession planning is the norm and extends beyond finding a deputy who can take over when the time is right. This is one way that potential recruitment crises can be avoided and enables individuals to have realistic expectations.

The first headship

Any newly appointed headteacher meets a set of challenges that need to be addressed. In the first headship those challenges are being met for the first time. While an exhilarating and enjoyable professional experience, contributors to the review who have recently met headship for the first time report stepping into someone else's domain, with a mixed level of appreciation, while at the same time having to work through others in a new set of circumstances as being disorientating. While trying to show confidence and inspiration, the unusual and unique circumstances of their school can lead them to too readily deferring to others. Those early days of adjustment to new circumstances hold enormous potential for success or struggle. Headship should not be seen as a test to pass and new headteachers need to be supported in order to help them succeed. This support needs to begin on appointment and before taking up the post.

Mentoring in a first headship

Any programme to encourage and support individuals into headship should be seen as a five year experience in two parts. The pre-appointment and post appointment phases.

Upon appointment, optimism and belief typically run high on the part of all involved. The promised of a 'fresh start' or 'continuity' or 'a gentle touch on the tiller' point to a build of momentum with the new headteacher sharing the ambitions of governors and local authority. That ambition is not always shared by all staff, parents, community or pupils.

Managing the transition to a new leadership for the school is a challenge for a headteacher. Even for the experienced headteacher moving to a new school, that transition is exhilarating, daunting, confusing and invigorating all at the same time. For the headteacher new to headship and their own new school, that transition is made more complicated by the unexpected.

All headteachers need available support and those moving to a new school need an available and effective mentor.

Recommendation 20

Immediately upon appointment to a first headship, it should be incumbent upon the new headteacher to secure a mentor who advises from the point of appointment and before taking up the post and for the following two years. That mentor should be selected, subject to a maximum caseload, from a central directory of headteacher colleagues who are between three and six years into their own headship career. The newly appointed headteacher should inform their local authority and Chair of Governors who they have selected and the reasons for that selection.

The allocated mentor needs to be someone who is sufficiently experienced to be able to help but also able to recall the first experiences of headship. They should be able to determine when to advise and when to refer the issue elsewhere. Highly experienced headteachers can also be used by the individual in a mentoring capacity but the benefit of turning to a colleague for whom much practice has not yet become routine will be significant.

Recommendation 21

Serving headteachers with between three and six years' experience should expect to act as mentor to a newly appointed headteacher, with training and support, as part of their own further professional development.

Supporting a colleague though mentoring will benefit the mentor in that it will both provide a reminder of a road travelled and progress made as well as offer a developmental understanding that can be transferred to other colleagues within their school.

Recommendation 22

As well as the allocated mentor, new headteachers should be encouraged to seek the intermittent support of a very experienced headteacher, perhaps a recently retired one, to whom they can turn for sage advice born of there being little left to surprise them.

Experienced headteachers should be invited to nominate themselves for a directory, with a description of their background from which new headteachers can select and build a relationship. Some new headteachers will have a natural informal mentor but the offer should be there, particularly if the headship appointment means relocation or different circumstances.

The serving headteacher community

Headteachers typically see it as a professional commitment and pleasure to support new headteachers formally and informally. Most recognise the support they themselves received and see this as a reciprocal commitment. The recommendations for revision to the NPQH programme involve serving headteachers in a range of roles, both trained and incidental. All roles are vital to the success of individuals, schools and the national agenda.

The support of a candidate for the NPQH programme over the two year period is a commitment for the candidate's present school and headteacher and is also an opportunity.

Recommendation 23

Each serving headteacher who has a member of staff taking part in the NPQH programme should be entitled and expected to take a three week 'wider opportunity' sabbatical away from their post at a suitable point during their colleague's engagement in the programme.

This will allow the candidate the opportunity to assume full responsibility for the school and at the same time allow the headteacher to experience a professional learning opportunity that will be of use to them personally. Headteachers might use the time to take stock of the current developments, be attached to a government agency, visit schools in another region or nation or join a formal professional learning experience. Essentially the headteacher should be expected to refresh, reflect, and articulate some ways in which their practice will develop as a result of the secondment experience.

Well used, this should contribute significantly to the Welsh reform agenda. This absence of a senior leader from school could give other colleagues the opportunity to assume responsibility and for a fledgling teacher to cover the space created by the absence of the headteacher.

From the current to revised provision leading to the NPQH

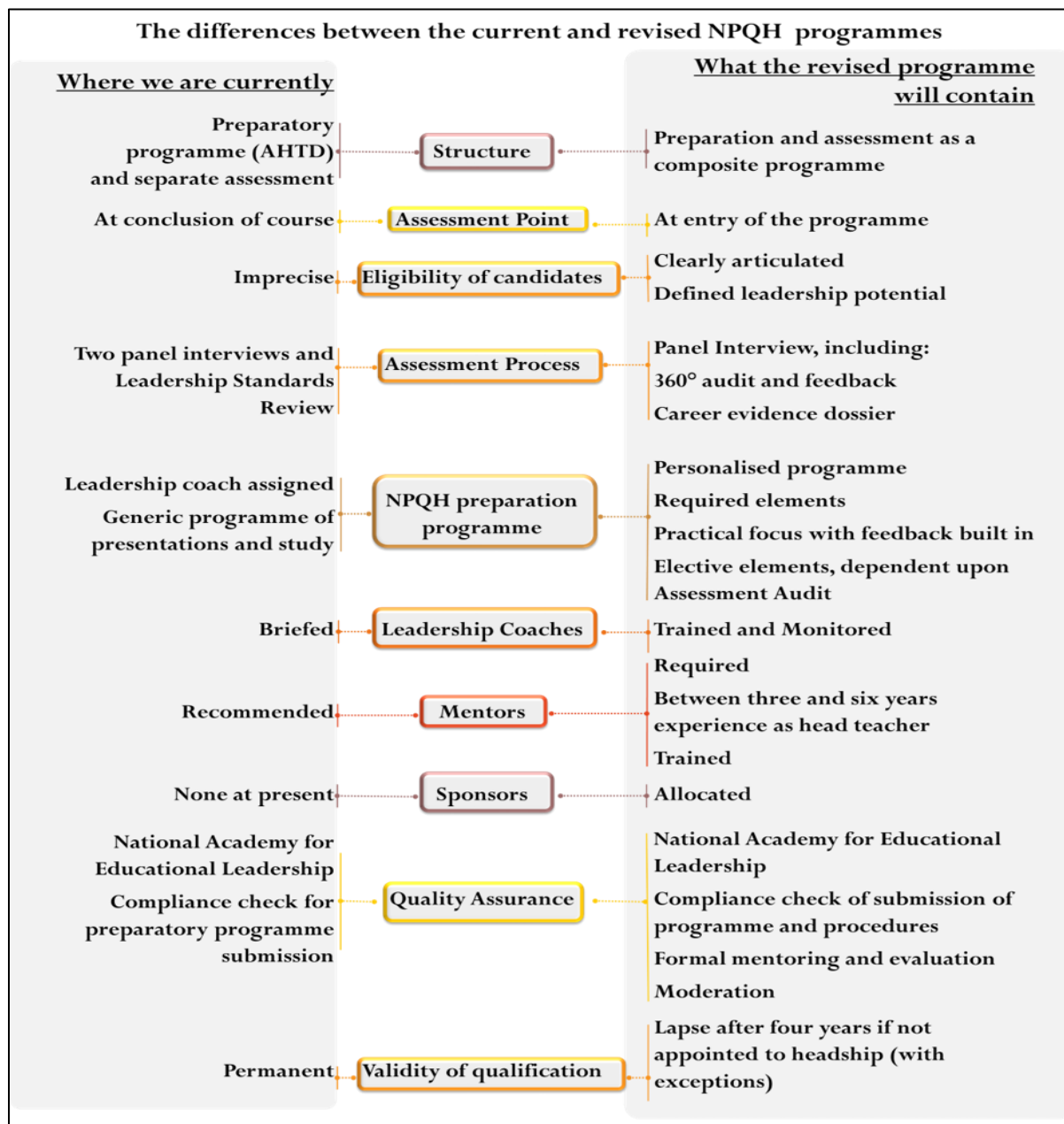


Figure 2: The differences between the current and revised NPQH programmes.

Part 4: Wider aspects of the remit

The remit for the review invited consideration of wider issues connected with the NPQH and the recruitment and appointment of teachers to their first headship. These are addressed here with recommendations.

Contributors to the review were often keen to discuss related issues in the remit in respect of the headteacher recruitment, including issues of attractiveness of the role. The most common among these issues is recorded here with some suggestions of a way forward.

Recruitment of those from beyond teaching to headship

The review was asked to examine the issue of whether appointment to headship should be dependent on Qualified Teacher Status bringing Wales into line with England where the requirement was relaxed as part of the Academies and Free Schools Act³⁰ of 2013. At the same time England removed the requirement for headteachers to hold Qualified Teacher Status (QTS). Wales retained the requirement for anyone appointed headteacher to have achieved the NPQH. However, the NPQH changed from a developmental programme to assessment only at that time.

At that time England had dispensed with the NPQH requirement for appointment of headship as part of an attempt to encourage people from outside of education to lead schools, theoretically bringing innovation. In effect, there have been very few examples of people without QTS entering headship and the NPQH exists as a government endorsed and funded programme in an optional form and most appointing bodies seek the qualification.

There is also the argument that those within schooling can learn much from other employment sectors. School leadership programmes³¹ often draw on contributions from leaders in business, health, sport, media, military or commerce and there is often enthusiasm for schools adopting methodology and practice from other sectors. Could some people from other fields be influential as headteachers and could this be a way to address in part the recruitment issues for some schools?

The review found almost universal opposition to the appointment of people without QTS to headship. The view most commonly expressed was that a headteacher should have a background in teaching to fully understand the agenda and maintain credibility with the staff.

There were very few voices that offered that this was an area worth consideration, suggesting that people from different employment sectors might bring fresh perspectives.

Further consideration about whether those without QTS should be permitted to be headteachers risks creating a time and energy trap at a time when the focus for schooling in Wales needs to be on securing progress in the educational reform agenda.

Recommendation 24

³⁰ Department for Education (2010-2015) Academies and Free Schools Act (2010-2015) *Crown Copyright* <https://www.gov.uk/government/publications/2010-to-2015-government-policy-academies-and-free-schools/2010-to-2015-government-policy-academies-and-free-schools>

³¹ Such as NAEL leadership unlocked series available: <https://nael.cymru/media/leadership-unlocked/>

The issue of appointment to headship in Wales without QTS should be ‘shelved’ for five years when the matter can be re-visited if appropriate.

Issues of recruitment in particular types of school

Many contributors argued that the generic nature of the current NPQH programme disadvantages recruitment to headship in particular types of school, most notably schools of a religious character, special schools and Pupil Referral Units and Welsh-medium schools.

In 2021, the proportion of Welsh-medium secondary schools with no substantive headteacher (11.1%) was more than double the average for all schools in the secondary sector (4.9%). Welsh-medium primary schools with no substantive headteacher (7.4%) was slightly higher when compared to all primary schools with no substantive headteacher (6.0%)³². It should be noted that many schools with no substantive headteacher are in formal or informal partnership arrangements as described earlier³³.

Data shows that the proportion of senior leaders describing themselves as at advanced or proficient level by Welsh language ability in 2021 was 34% and at ‘non-leadership’ level was 27% but the data does not identify the proportion of proficient speakers of Welsh who possess the NPQH. This makes it difficult to be definitive about whether there is a lack of appetite for headship in those who possess the NPQH and who speak Welsh proficiently, a nervousness about application or some other inhibitor.

Potential inhibitors to the attractiveness of headship in Welsh-medium schools are suggested by people who work within the sector. Issues such as the quality of buildings, along with variable pupil and parent attitudes, are quoted but these mirror many of the circumstances claimed by a proportion of English-medium schools and special schools. What is apparent is the deterrent effect of the perceived lack of understanding about some of the challenges that exist for the leadership of Welsh-medium schools that are particular to the sector: parity with courses for GCSE and ‘A’ level, including translations of course texts, the challenge of waiting for translation services from local authorities, having to translate all documentation for governors and parents. Some of these affect primary schools disproportionately due their generally smaller administrative staff. None of this is to question the benefits to pupils and communities of Welsh-medium education or the efforts of schools but to point out the difficulties felt by leadership which may act as a deterrent.

Many of the issues in schools of a religious character are shared by both the Catholic Education Service and the Church in Wales. The proportion of schools of religious character without a substantive headteacher in 2021 was 15%³⁴. Again, the perceived appetite for

³² Source: SWAC

³³ See footnote 9 for details on federations.

³⁴ Source: SWAC

headship is of concern though to no discernibly different extent or different reasons from schools generally.

The Catholic Education Service provides modular leadership programmes across England and Wales. Practising Catholics, not presently working in Catholic schools, are often unaware that they can attend and could be offered opportunity as part of their personalised elective programme.

In 2021, acting headteachers were recorded in 8% of special schools and five (19%) of the twenty-one Pupil Referral Units³⁵ were without a substantive headteacher. Attracting potential headteachers towards special schools needs to be part of earlier career advice with opportunity to experience special school circumstances available to people to spend time in settings.

The various measures proposed in the revised programme for the NPQH should address some of the issues in respect of the recruitment and success of headteachers in these sectors.

The system must be more proactive in encouraging people towards headship generally. Welsh-speaking teachers who work in bilingual and English-medium schools should be made aware of opportunities in Welsh-medium schools which may be appropriate. Similarly, teachers should be conscious of the welcome they would receive in many of the Church in Wales schools, subject to them holding broadly Christian values.

Specific modules might be very applicable to potential headteachers in Wales and they should be available as electives. The initial audit needs to point candidates to electives based on where they might consider their career taking them rather than their current post.

Suggestion 01

The Welsh Government could explore with interested parties the potential for using an algorithmic method to recommend vacant headship posts to prospective candidates.

Researchers such as Roth (1982)³⁶ have interpreted the real-world system implication of the Gale and Shapley³⁷ algorithm method in a range of employment settings to enable best match. Candidates could elect to be part of the national algorithm process, matching themselves to potential posts in order to reduce the prospect of applying for posts not suited to their background. Initially, any candidate could apply for vacancies individually until confidence in the system was established. This recommendation might seem radical

³⁵ Source: SWAC

³⁶ Roth, Alvin (1982) The Economics of Matching: Stability and Incentives. *Mathematics of Operations Research* Vol. 7, No. 4. Available: <http://www.eecs.harvard.edu/cs286r/courses/fall09/papers/roth.pdf>

³⁷ Gale, D., & Shapley, L. S. (1962). College Admissions and the Stability of Marriage. *The American Mathematical Monthly*, 69(1), 9–15. <https://doi.org/10.2307/2312726>

and will no doubt be opposed or rejected by Teacher Unions and some governing bodies but it would be worth some exploratory investigation.

Such processes and mechanisms, managed well, could help people from BAME, Welsh speaking and faith communities to at least be exploring all available leadership avenues.

The changing nature of headteacher recruitment patterns

The headship recruitment picture for those new to headship is distorted by social change over time. Just thirty years ago, the leadership route would see an individual begin headship in a smaller school and move to a larger school in their locality (and sometimes to a third and larger school). Nowadays, the ease of travel along corridor routes in north and south Wales means that headteachers can travel what were previously seen as significant distances to work, removing the need for relocation. While this gives some schools a wider hinterland of application, it also reduces the frequency of application for posts away from the corridor routes. This phenomenon can also have the impact of reducing opportunity for those who wish not to travel as their potential appointment possibilities can be taken by others from beyond.

Every board of school governors wants the headteacher most suited to their school. There is some evidence to suggest that some good candidates are inhibited about applying for headship in their own community, almost expecting those from afar to be appointed. This can create a vicious circle where the impression is created of a local authority policy to appoint external candidates.

The evidence from the most recent two years, however, shows a contradiction to the anecdotal trends with the proportion of people moving between local authorities on appointment to headship reducing to 8% in 2021 from 23% in the previous year³⁸. The proportion of acting headteachers and other 'in school' appointments to headship in the last two years might reinforce an impression that external applicants are less favourably received. This could result in reduced applications and anecdote influencing the attractiveness of individual headships as candidates rationalise their prospects in application.

Rather than allow such anecdotes to prevail and lose potential applicants for headship by default, local authorities might commit to proactive engagement with potential candidates as suggested above.

Suggestion 02

Local authorities could commit to annual informal career conversations with potential headship candidates with the NPQH (provisional and verified) about the realistic

³⁸ Source: SWAC

possibilities for them in their community. This should be done without infringing equal opportunities legislation, for example by offering the opportunity to all candidates.

In some parts of rural Wales, the pool of applicants is reducing markedly and particularly in smaller schools. The reasons offered include a concern about the ultimate responsibility for all aspects of the school with limited support from other staff. Beyond this, individuals talk of their career 'stalling': being consumed by the work of the school to the extent that engagement with the big picture diminishes with the risk of 'being forgotten' educationally.

Suggestion 03

The Independent Welsh Pay Review Body (IWPRB) could be asked to consider what can be done to support schools, and particularly small schools, in more rural parts of Wales in their attractiveness to potential headteachers. This could be more subtle than financial incentives, including job share arrangements where the co-headteacher shares a role with a colleague in larger settings, or guarantees relating to regular support to offer experiences elsewhere with the school managed by a peripatetic headteacher. Similarly, a fixed-term headship appointment with a genuine offer of a post in a larger school, negotiated beforehand, providing succession planning for schools where retirement is predicted, could be considered.

For senior leaders in some secondary schools and larger primary schools, the starting salary available to a headteacher in a smaller school is seen as a disincentive to application for promotion.

Suggestion 04

The IWPRB could be asked to consider the impact of salary differentials on recruitment.

The Professional Learning Passport has been in place since 2017. However, the PLP remains for too many teachers something that they can leave behind once induction is complete and its use ceases to be mandatory.

This is a shame because the PLP could be a natural vehicle for collation, exchange and integration of experience, learning and feedback of candidates on the NPQH preparatory programme. One problem is that there are other accessible platforms that individuals and informal groups turn to naturally which are dynamic and interactive. Efforts have been made to incorporate the use of the PLP into the current programme but these have been slow to materialise. Going forward there are plans to ensure that the PLP is embedded in all professional learning supported by the Welsh Government.

Suggestion 05

Programme organisers for the NPQH could agree on a range of approaches to logging experience and learning which will enable candidates to engage fully with the

programme with added value gained through communities of interactive reflection and recording.

Sustaining experienced headteacher motivation

Until the 1990s most headteachers were people who were towards the end of their career in education. The demography of headship has changed significantly, partly due to a fluctuating supply of prospective headteachers and partly due to the growing 'middle tier' attracting those with experience of headship to a range of involvement in education beyond schools. Where headteachers used to spend the final ten years or so of their career in the role, it is not unusual for headteachers today to be appointed to their first post with at least twenty five years of their career remaining.

Headship is a very demanding role and many report features of what is often called 'burnout'. They tell of wondering whether they can continue to do this job much longer. There are though, others who have been headteacher for more than twenty years who, while reporting the job harder than ever, have also found the task manageable, having 'gone through the wall' some years earlier.

At present many headteachers are removed from direct responsibility for a school as they take on a secondment with a middle tier organisation which leads often to a permanent role. While this has obvious benefits, the permanent appointment blocks the route for other potential secondments and professional refreshment and can build an impression over time that the world beyond schooling is more attractive than the one within it.

Suggestion 06

There is a need to look at provision for headteachers beyond the first few years. Possibilities such as fixed term secondments to a widening range of middle tier placement opportunities would refresh individuals and widen their understanding and engagement within Welsh schooling. Such fixed-term placement secondments could be built into the staffing establishment of all middle tier organisations and be part of the planned experience of headship. The system should be mature enough to ensure that they remain fixed-term secondments rather than allow them to become rehearsals for permanent positions.

The issue of transition from headship to retirement might be worth considering in the light of the impact of the pandemic on the energy of some headteachers in the latter stages of their career.

Suggestion 07

The viability of the headship of a school being 'shared' on a part-time basis in a phased retirement of the substantive headteacher with a deputy headteacher leading the school on an interim basis should be considered by relevant stakeholders.

There are indications that such arrangements would be attractive to 'end of career' headteachers provided no detriment to pension conditions. For the deputy headteachers involved the experience of working in a different school with an experienced headteacher would be invaluable.

The vexing issue of the managerial demands of headship

Before the introduction of Local Management of Schools in 1988, headteachers would often complain about the undue interference of the local authority and voice the view that they should be allowed to sort out matters such as finance, staffing and premises unfettered by 'the office', in the best interests of their own school. The shift to school level ownership saw most schools making imaginative use of resource and the headteacher's role has focused increasingly upon management issues.

In the last two decades, however, regulation has increased and the level of responsibility, and indeed culpability, now resting with headteachers is seen by some as being too much to carry. While schools typically have service level agreements with their local authority, there is sometimes disquiet about the level of expertise and experience that is found in some local authorities which have over time seen their own staff reduced.

This leads to tension and stress for many headteachers with a range of repercussions. For prospective headteachers, the articulation by significant leadership figures in schools of what they describe as high pressure situations, can act as a deterrent to taking on leadership responsibility. Some headteachers become so wary that they immerse themselves in the managerial to the detriment of their wider and central role. Local authorities can find themselves stretched by the demands of uncertain headteachers.

When the Professional Standards for Leadership were developed, the working groups believed that the headteacher should be the leader of learning within their school with the confidence that they could turn to their local authority for advice, support and expertise in the managerial aspects. The contributions to the review have shown that a significant proportion of headteachers find such access to expertise unconvincing to a lesser or greater degree. Most local authority officers make every effort to support their schools and many bolster support for new headteachers.

Some headteachers worry about their own lack of knowledge and that worry increases with the fear that they don't know what they don't know. At the same time, many headteachers want a definitive answer to their problem. However, this can be unwelcome when they get an answer they prefer not to hear, or when they get an answer that means they have to take on a task for which they feel unprepared, such as a capability or tribunal procedure. They also know that trade union representatives are likely to be much more familiar with the blue

and burgundy books³⁹ than they are, and much more used to the having the arguments that arise. All of this uncertainty about knowledge and the variable relevance and immediacy of it when provided make the issue of preparation very complex.

Local authorities help schools and headteachers apply the law and, at the same time, require certain procedures and returns from schools to enable their own decision making, respecting the needs of their own locality. This is part of the democracy of government. The law though is national and is not interpreted differently in different places.

Suggestion 08

The Welsh Local Government Association and ADEW could consider nominating each of the local authorities as the national champion for an aspect of the managerial role of the headteacher. This champion would maintain a national guide to necessary statutory and legislative practices, lead regional dissemination (optional and compulsory) of new or prevalent management practice likely to trouble headteachers and use colleagues in other local authorities to support their efforts. These people would become the ‘last word’ on difficult issues and would be respected for their authoritative expert knowledge.

This would not take away the local authorities’ right or remit to develop systems and processes appropriate to their community. This suggestion is simply about the headteacher’s role within the law, which is a constant.

Some headteachers describe particularly stressful incidents which left them feeling vulnerable and affected badly, whatever the cause of the problem.

Recommendation 25

The Welsh Government should ensure the availability to all headteachers of a confidential supervision service. Headteachers should also be able to arrange a formal supervision for any colleague affected by a traumatic incident.

As stated several times in this report, it is unlikely that any treatment of matters of management will ever be sufficient if decontextualised in a course programme. People’s attention to the issues rises when it is immediate. Nevertheless, it is possible to reassure people that the issues which concern them are taken seriously and give confidence that they can access support in many forms. Formal supervision capacity needs to be available for headteachers throughout their career.

³⁹ DfE (2013) School Teachers’ Pay and Conditions Document and Guidance on School Teachers’ Pay and Conditions for School Teachers in England and Wales

When things go badly wrong

However good the preparation and qualification systems, there will still be rare occasions when the appointment of a headteacher does not fulfil the expectations upon it. When this does happen, the consequences are significant. For the individual the repercussions can affect well-being, health, relationships and career prospects. For the school, the future of pupils, staff and community are jeopardised to some degree.

Resolving the situation is often a lengthy process and very painful. For the new headteacher, the likelihood is that their financial commitments have grown and there will have been a possible relocation of family.

Suggestion 09

The IWPRB could be asked to consider appropriate provisions for headteachers in rare situations where their appointment has not worked. If, during the first eighteen months of headship, the signs are that the appointment was a mistake, it could be possible for the headteacher to request a return to the role of deputy headteacher and placement in another similar school locally or beyond without prejudice. The local authority would facilitate the move with the individual's salary pegged at its current level until salary rises and increments of the deputy headteacher overtake. The individual would be released from circumstances that have not worked with benefit to well-being and opportunity to rebuild personal professional credibility. The school would be more secure with new leadership.

Deputy headship

The programme for senior leadership development is developing within the professional learning pathway. However, the system needs some clear parameters to both encourage and protect deputy headteachers.

Suggestion 10

One year after appointment, all deputy headteachers could undertake a basic preparation for headship programme which fits them for the role of Acting Headteacher, either in emergency in their own school or by placement elsewhere.

In addition to their varying specific duties, often shared with the headteachers, the role of deputy headteacher is first and foremost to deputise. This might be on infrequent planned occasions when the headteacher is out of school, for example at a conference. It might also occur when the headteacher is unwell and the deputy, 'takes the reins'. When the headteacher's absence extends due to longer term ill-health, it is natural that the governing body want to recognise the additional responsibility and, for the confidence of the community, use the term 'Acting' headteacher. While there are many occasions when this

exactly the right course of action, it should not be assumed and other possibilities should be explored extensively first.

This is not to inhibit or undermine deputy headteachers and some are exactly the right person at exactly the right time in exactly the right school. Pragmatism is sometimes necessary for a local authority on behalf of a governing body. However, too hasty a confirmation of the acting role can create later difficulties both for the individual and the school as the longer term situation unfolds. Some of the potential problems are described earlier in this report and a significant one is that experience in the role in a 'known' school convinces some people that they have 'learnt' headship while others with the NPQH are blocked or deterred by the presence of the acting headteacher. In some cases, these individuals would be perfectly placed to lead the school temporarily and would gain valuable experience in their own preparation for substantive headship.

Suggestion 11

The Welsh Government could consider agreeing some protocols with local authorities to best manage the potential appointment of serving deputies to acting headship in their own schools.

Just as the proposals for the revised programme envisage a suite of elements for candidates, deputy headteachers need wide opportunities to build understanding and practice. There are examples in Wales of effective local arrangements managed by the local authority or communities of schools. In some, headteachers are collaborating, supported by their local authority to organise placement exchanges for deputy headteachers. These provide opportunity for people to gain fresh insights on school leadership, teamwork, curriculum approaches, pedagogic development and different school communities. Again, such experiences should be carefully thought through and tailored to meet the needs of all partners but such developments need to be harnessed.

Conclusion

The success of the education reform agenda in Wales relies on a belief in the headteacher community. The headteacher community needs also to believe in itself. That belief will strengthen with confidence built through successful experience and dependable support. Those entering headship should do so in the knowledge that they have demonstrated their readiness and commitment through thorough preparation; formal, structured and incidental. They should also be confident that they will be supported in headship by colleagues and agencies which travel with them on the reform journey and will, in turn, offer professional support to the next generation of school leaders. The NPQH can be an important contribution: a prestigious recognition, valued by the individual and acknowledged by the wider education community.

Appendices

Appendix A: Experiences could be provided as part of evolving work in school

Some examples of the range of experiences that might be gained as part of the role of senior leader in a school where the serving headteacher provides opportunity.

Governance

- Being the unaccompanied professional leader of the school at a governing board meeting
- Write a Governing Body strategy report
- Attend a selection of committees of the governing board
- Attend a governing body exclusion review

Parents

- Attend an exclusion meeting with parent and child
- Join a meeting dealing with a serious parent complaint
- Host a meeting for parents about the curriculum
- Produce newsletters, information documents and updates for parents

Management procedures and processes

- Audit a risk assessment for an educational visit
- Attend an employment tribunal hearing
- Sit in a disciplinary or capability meeting with a member of staff
- Take an opportunity to engage with a safeguarding issue or GDPR breach
- Join a meeting with union representatives
- Take 'Staff Briefing' sessions on a regular basis
- Take part in the formal interview for new staff, both teaching and additional staff
- Organise and manage fire drill, lockdown or evacuation procedures
- Take responsibility for setting timetable parameters and priorities and checking efficacy of timetable produced
- Join the local authority finance meetings with leadership at the school
- Shadow the business manager to gain understanding of contracting, procurement, pay role etc.
- Supervise the work of site, catering or administrative staff for a month
- Work with Health & Safety officer (visit to school to observe inspection)
- Undertake GDPR training
- Undertake DSO training. Be the DSO or DOSO
- Organise and manage testing or examination arrangements.

Learning and school improvement

Engage with all departments/ phases in across the spectrum of areas of learning experience

Engage with pastoral and vocational aspects of school

Take specific responsibilities for leading aspects of School Development Plans and self-evaluation

Sit on a meeting between the headteacher and the school improvement partner

Carry out staff 1:1s; Lead Professional Development review and Performance Management meetings

Plan and manage a Professional Learning programme for staff

Exercise a period of leadership on a whole school approach of mental health and wellbeing

Prepare and undertake induction of new staff

Be involved with recruitment, redundancy and capability

Oversee a residential visit, from planning to follow-up, ensuring maximum benefit to learning

Representation

Attend and take a full part in local authority and regional headteacher meetings etc.

Attend diocesan meetings, as appropriate.

Appendix B: Some examples of possible elective elements

The electives would be available to candidates and selected through negotiation after assessment at the beginning of the programme. Such electives would supplement the required elements of the programme.

They would be provided in various forms over the two-year period of the programme: on-line, practical workshops (possibly as part of an optional residential experience), interactive question and answer virtual sessions, bite-sized theoretic presentations.

These elective elements would be provided for the NPQH candidates but accessible to others subject to availability.

The list below is not exhaustive or complete but serves to illustrate the types of electives that should be designed.

Focus	Approach	Time and Format
Curriculum design	Theory and practical examples	Virtual soundbite sessions with occasional Q and A interactive opportunities
Understanding schools of a religious character	Descriptions from diocesan representatives	Planned visits and on-line programme of available workshops
Leading Welsh-medium schools	Periodic or extended placement set alongside theoretic examples	Virtual on-line sessions with Q and A opportunities with school leaders
Leading small schools	Periodic or extended placement set alongside theoretic examples	Virtual on-line sessions with Q and A opportunities with rural school leaders
Understanding ALN	Theoretic and practical examples	On-line bite sized availability plus interactive Q and A opportunities
Understanding ALN	Placement in Special school, periodic or intense with possible exchange with another colleague on the programme	As agreed

Focus	Approach	Time and Format
Developing individuals through coaching	Workshop and practical exercises	One day
Timetabling	Workshop, practice and analysis	One day
Managing interviews	Training workshop, role play and coaching	One day
Building effective teams with shared commitment	Coaching from beyond educational settings	One day
Understanding school governance	Theoretic programme with observation	On-line sound bite programme plus visits to governing body meetings in other schools
Working with Unions	Training on key points/ Theoretic case studies	Workshops
Working with stakeholders: parents, governors, local business etc	Examples from across Wales	Virtual sessions available in sound bites
Understanding SIMS	Tuition	Online virtual soundbite sessions, plus Q and A interactive opportunities
Developing personal resilience: managing the well-being of self and others	Theory and practice connection through workshops	One day
Understanding delegation	Theoretic programme with case studies	On-line sound bite programme
Holding people to account	Theoretic programme with case studies	On-line sound bite programme
Conflict resolution	Role play	Half day

Appendix C: List of recommendations and suggestions in the report.

Recommendation 01

The NPQH should be a single national programme provided and recognised under the auspices of government.

Recommendation 02

The organising body should articulate the clarity of purpose for the qualification and build the experiences and assessments, mechanisms and materials to make the programme as effective and economic as possible using expertise from a range of collaborating agencies of government and other providers.

Recommendation 03

The National Academy for Educational Leadership should assume responsibility for the quality assurance of the programme. This should include moderation, evaluation and on-going modification to content.

Recommendation 04

Estyn should evaluate the effectiveness of the school's support of all staff for leadership development as part of school inspection. That is, the extent to which the headteacher and governors deliberately and strategically enable teachers at different career stages to accumulate and use leadership experiences.

Recommendation 05

The NPQH programme should be of two years duration and end with verification.

Recommendation 06

Each candidate should access the programme through an assessment centre process.

Recommendation 07

The EWC should maintain an accurate central register of all holders of the NPQH, tracking their development over seven years. The emerging data should be used to inform future programmes and policy as well as support local authorities in their recruitment efforts.

Recommendation 08

If, in the four years after the award of the verified NPQH, the individual has not applied for headship, the qualification should lapse. Exceptions due to extenuating personal circumstances should be permitted as part of quality assurance processes.

Recommendation 09

The significant point of assessment for the NPQH should be at the beginning of the programme. Following rigorous assessment, the successful candidates should be seen to have gained the NPQH (provisional) with verification occurring at the end of a two-year programme, subject to them completing all required elements of the programme to the required standard and demonstrating progress in preparedness.

Recommendation 10

Leadership coaches should be appointed to the role on the basis of clear criteria. They should be invited by application and committed to online training and briefing. Regular observation and moderation sessions should be a feature of their involvement.

Recommendation 11

Leadership coaches should work with a group of a maximum of eight candidates. The role and responsibility of the leadership coach should be carefully specified and articulated and should include oversight of each individual's progress through the programme and producing timely reports. Some elements of written 'coursework' will be assessed by leadership coaches not connected with the candidate to enable moderation.

Recommendation 12

The programme should comprise required elements and elective elements.

Recommendation 13

Those taking part in the NPQH programme should be encouraged and expected to identify and follow elective as well as required elements of the programme that give them opportunity to experience some aspects of headship and purposeful engagement with the headteacher community. In doing so, they should be supported as much as possible by their current school in terms of flexibility to provide opportunity for engagement.

Recommendation 14

For verification of the NPQH, all required elements and negotiated electives should be completed to the expected standard and the candidate should be able to offer a summary of the progress made in developing their leadership capabilities over the course of the programme with reference to each of the five leadership standards.

Recommendation 15

Recognition should be conferred on candidates with the verified NPQH at an annual and significant celebratory presentation, open to all candidates and their guest, with high level representation from the Welsh Government.

Recommendation 16

Those with the NPQH should be allocated a sponsor headteacher who will liaise with them over their next career step.

Recommendation 17

Headteacher appointment processes should accept the verified NPQH and be concerned with interviewing appropriate candidates on the basis of securing the best candidate for their school and community. The NPQH should remove the need for multiple tasks in a headship appointment assessment centre.

Recommendation 18

The validity and reliability of the NPQH should be accepted by appointing bodies as indicators of the individual's credibility and suitability for headship. The appointing body should accept this and limit their considerations to determining which candidate is best suited to their own school's circumstances.

Recommendation 19

Two years after verification, holders of the NPQH who have not secured a headship post should be expected to attend an updating programme annually as a condition of continuing registration.

Recommendation 20

Immediately upon appointment to a first headship, it should be incumbent upon the new headteacher to secure a mentor who advises from the point of appointment and before taking up the post and for the following two years. That mentor should be selected, subject to a maximum caseload, from a central directory of headteacher colleagues who are between three and six years into their own headship career. The newly appointed headteacher should inform their local authority and Chair of Governors who they have selected and the reasons for that selection.

Recommendation 21

Serving headteachers with between three and six years' experience should expect to act as mentor to a newly appointed headteacher, with training and support, as part of their own further professional development.

Recommendation 22

As well as the allocated mentor, new headteachers should be encouraged to seek the intermittent support of a very experienced headteacher, perhaps a recently retired one, to whom they can turn for sage advice born of there being little left to surprise them.

Recommendation 23

Each serving headteacher who has a member of staff taking part in the NPQH programme should be entitled and expected to take a three week 'wider opportunity' sabbatical away from their post at a suitable point during their colleague's engagement in the programme.

Recommendation 24

The issue of appointment to headship in Wales without QTS should be 'shelved' for five years when the matter can be re-visited if appropriate.

Recommendation 25

The Welsh Government should ensure the availability to all headteachers of a confidential supervision service. Headteachers should also be able to arrange a formal supervision for any colleague affected by a traumatic incident.

Suggestions

Suggestion 01

The Welsh Government could explore with interested parties the potential for using an algorithmic method to recommend vacant headship posts to prospective candidates.

Suggestion 02

Local authorities could commit to annual informal career conversations with potential headship candidates with the NPQH (provisional and verified) about the realistic possibilities for them in their community. This should be done without infringing equal opportunities legislation, for example by offering the opportunity to all candidates.

Suggestion 03

The Independent Welsh Pay Review Body (IWPRB) could be asked to consider what can be done to support schools, and particularly small schools, in more isolated parts of Wales in their attractiveness to potential headteachers. This could be more subtle than financial incentives, including job share arrangements where the co-headteacher shares a role with a colleague in larger settings, or guarantees relating to regular support to offer experiences elsewhere with the school managed by a peripatetic headteacher. Similarly, a fixed-term headship appointment with a genuine offer of a post in a larger school, negotiated beforehand, providing succession planning for schools where retirement is predicted, could be considered.

Suggestion 04

The IWPRB could be asked to consider the impact of salary differentials on recruitment.

Suggestion 05

Programme organisers for the NPQH could agree on a range of approaches to recording experience and learning which will enable candidates to engage fully with the programme with added value gained through communities of interactive reflection and recording.

Suggestion 06

There is a need to look at provision for headteachers beyond the first few years. Possibilities such as fixed term secondments to a widening range of middle tier placement opportunities would refresh individuals and widen their understanding and engagement within Welsh schooling. Such fixed-term placement secondments could be built into the staffing establishment of all middle tier organisations and be part of the planned experience of headship. The system should be mature enough to ensure that they remain fixed-term secondments rather than allow them to become rehearsals for permanent positions.

Suggestion 07

The viability of the headship of a school being 'shared' on a part-time basis in a phased retirement of the substantive headteacher with a deputy headteacher leading the school on an interim basis should be considered by relevant stakeholders.

Suggestion 08

The Welsh Local Government Association and ADEW could consider nominating each of the local authorities as the national champion for an aspect of the managerial role of the headteacher. This champion would maintain a national guide to necessary statutory and legislative practices, lead regional dissemination (optional and compulsory) of new or prevalent management practice likely to trouble headteachers and use colleagues in other local authorities to support their efforts. These people would become the 'last word' on difficult issues and would be respected for their authoritative expert knowledge.

Suggestion 09

The IWPRB could be asked to consider appropriate provisions for headteachers in rare situations where their appointment has not worked. If, during the first eighteen months of headship, the signs are that the appointment was a mistake, it could be possible for the headteacher to request a return to the role of deputy headteacher and placement in another similar school locally or beyond without prejudice. The local authority would facilitate the move with the individual's salary pegged at its current level until salary rises and increments of the deputy headteacher overtake. The individual would be released from circumstances that have not worked with benefit to well-being and opportunity to rebuild personal professional credibility. The school would be more secure with new leadership.

Suggestion 10

One year after appointment, all deputy headteachers could undertake a basic preparation for headship programme which fits them for the role of Acting Headteacher, either in emergency in their own school or by placement elsewhere.

Suggestion 11

The Welsh Government could consider agreeing some protocols with local authorities to best manage the potential appointment of serving deputies to acting headship in their own schools.

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