



# International Thought Leaders Programme

Draft paper

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## Introduction

In November 2004, The Scottish Executive published, "Ambitious Excellent Schools: Our Agenda for Action", which described the most comprehensive modernisation in Scottish Schools for a generation. The document gave high priority to leadership development which, supported by the Hunter Foundation, would give access to world class thinking on leadership and exciting new perspectives. Three key international thinkers were identified and approached to work with the Scottish system to advise and guide our thinking. They were Dr Terry Dozier, Ellen Moir and Professor Richard Elmore. In this paper we outline the work that was undertaken by these three thought-leaders, and try to trace some of the impact their work has had.

## Terry Dozier

The first of these international visits, from Dr Terry Dozier, took place in the autumn of 2005. Terry is the Director of the Centre for Teacher Leadership at the Virginia Commonwealth University and was Senior Adviser to Teaching to the US Secretary of Education at the time of the Clinton administration. During her visit, Terry met and worked with local authority CPD co-ordinators, academic staff from Aberdeen and Stirling Universities, colleagues from the General Teaching Council for Scotland, school leaders and Chartered Teachers. Terry brought a wealth of interesting perspectives to these audiences, including research findings, and confirmed the importance of continuing professional development for teachers.

In her report on her visit, Terry concluded that there was much to celebrate in the developments arising from "A Teaching Profession for the 21<sup>st</sup> Century". She paid tribute to our long tradition of excellence in education, our commitment to continuous improvement and our willingness to learn from others. She was particularly impressed by initial teacher education, by the teacher induction programme, by the Chartered Teacher programme and by the commitment to the continuous professional development for teachers in general, as evidenced by the establishment of the National CPD Team. However she indicated a number of areas where she believed we could improve our current practice; these included the selection and training of mentors for new teachers, some aspects of the implementation of the Chartered Teacher programme, and how we might ensure that professional review and development becomes more meaningful and beneficial to teachers.

In September 2006, Terry made a return visit to Scotland and delivered a keynote address at the Scottish Learning Festival on "Turning Good Teachers into Great Leaders" which highlighted the importance of developing teacher leadership as a means of cultivating a largely untapped resource for change and improvement in schools, in keeping good teachers in the classroom, and she highlighted the benefits for students. Terry also outlined the important role that teacher leaders might play in providing headteachers with much needed support, modelling effective practice, mentoring new teachers, leading professional development activities and being an advocate for pupils and parents. Following the keynote Terry addressed an invited audience on "Promoting and Supporting Teacher Leadership" at a lunchtime seminar.

During her visit, Terry continued to share the theme of “Developing Teacher Leadership” with several authorities, participating in conferences and seminars in Moray, Fife, North Lanarkshire and the Borders, East Lothian and Mid Lothian consortium. The visit concluded with a seminar for Chartered Teachers, their supporters and other interested parties at The General Teaching Council for Scotland. The seminar explored how we might maximise the impact of these excellent teachers and what we need to further develop.

At the end of the visit, Terry provided us with her reflections on Scotland’s efforts to enhance the teaching profession. The full text of these can be found in Appendix 2. A number of strengths were identified:

- The significant changes made since “the McCrone Agreement” in 2000 to strengthen the teaching profession and to enhance the quality of teaching that takes place within Scottish schools;
- The Induction Scheme which she described as highly regarded by all;
- The goals of the Chartered Teacher Programme;
- The role of universities in preparing new teachers who are enthusiastic and who possess strong content knowledge and the ability to reflect on their progress; and
- Strong support for high quality CPD and the important role played by the National CPD team.

Terry also left us with some challenges to consider:

- The selection and training of mentors for newly qualified teachers;
- Building on the strengths of the induction year;
- Ensuring quality and effective evaluation of the Chartered Teacher programme;
- Encouraging teachers to seek Chartered Teacher status and creating meaningful roles for those who have achieved it; and
- The challenge universities face in finding quality placements for students, creating partnerships with local authorities and integrating Initial Teacher Education programmes into the wider university systems.

Terry’s work with us has had much influence on professional development at all levels. At national level, her philosophy influenced the current review of the Chartered Teacher programme and the work of the national CPD Team as they promoted leadership at all levels through work with authorities, schools and teachers and by producing Occasional Papers. For example, Occasional Paper 10, “CPD for Teachers in Years 2-6” exemplifies CPD activities and highlights how teachers are developing leadership skills early in their careers. At authority level, the inter- authority consortium of Scottish Borders, East Lothian and Mid Lothian Councils developed a well received cross authority programme for Principal Teachers as Leaders of Learning. Scottish Borders also took forward a leading learning and teaching course which took place over a six month period with work projects undertaken in a school setting. This was informed by Terry’s belief that CPD needs to be a sustained enquiry.

## Ellen Moir, Janet Gless and Jan Miles

Terry's visits to Scotland were complemented by visits from Ellen Moir and her colleagues from the New Teacher Center at University College, Santa Cruz.

Ellen Moir is the Executive Director of the New Teacher Centre and is renowned for her work in the field of mentoring new teachers and in ground breaking work on formative assessment of teacher performance. Ellen and her colleague, Janet Gless, associate Director of the New Teacher Center, first visited Scotland in May 2006. During their visit they met a wide range of educators, conducted seminars and workshops and addressed meetings and conferences. In particular, the sessions they led on "Engaging and Supporting Professional Learning" and "Foundations of Mentoring" contributed significantly to our thinking on mentoring and coaching and their insights informed the National CPD Team's Occasional Paper 9, "Draft Guidelines for Coaching and Mentoring". In February 2007, we were delighted to welcome back Janet Gless along with her colleague, Jan Miles who is Senior Outreach Co-ordinator and Programme Director at the New Teacher Center. This time round, they offered the two day "Foundations of Mentoring" course to over 80 colleagues, including teachers, headteachers, officers from local authorities, staff from universities, GTCS, HAS, AHDS and EIS Learning Reps. As before, the course was an overwhelming success with very positive evaluations. Janet and Jan also delivered the second level course "Coaching and Observation" to approximately 60 colleagues. Again, this course was well received and demonstrated the power of coaching as a means of professional development. In addition, Janet and Jan met with a group of colleagues from local authorities and staff from St Columba's High School in Greenock, all of whom have a particular interest in the area of coaching and mentoring with new teachers.

As they returned to Santa Cruz in March, Janet and Jan were invited to share their observations with us. The text of this can be found in Appendix 5.

They were impressed by the passion and vision of the Scottish educators they worked with across the spectrum: from university faculty members and tutors to classroom teachers and mentors to head teachers, to those working at national and authority level. They observed a passion for and commitment to excellence and quality at all levels and an openness to consider new approaches and strategies.

They also noted a hunger or eagerness for capitalising upon the remarkable induction scheme that Scotland has already crafted for its beginning educators to ensure a high quality induction experience for all first year teachers. They heard many educators, at all levels of the system, wanting to consider mechanisms for supporting new teachers in their second and third years -- beyond the scope of the present induction policy.

Janet and Jan were impressed time and again with the general eagerness to consider new ideas and ask thoughtful questions that indicated a desire to draw applications to each educator's personal or local context. They expressed their enjoyment of the discussions that often took place during the trainings. Even acknowledging that one-time, workshop-style professional development does not necessarily lead to implementation, they felt that there were many new insights as well as validations of what educators were already practicing in their local authorities. They suggested strongly that there is a rather exciting window of opportunity here that could lead to some rather substantive advances in how local authorities implement the current induction scheme along with some new policies that could help support those changes. There is already emerging evidence that a number of colleagues across Scotland have made changes to induction programmes for probationers and their mentors since Ellen and Janet's first visit in 2006.

Ellen, Jan and Janet noted a strong desire on the part of Scottish educators to promote and implement mentoring/coaching models for all educators, not just for newly qualified classroom teachers. Many spoke of their interest in developing professional learning communities and strategies for advancing the quality of classroom instruction across the professional spectrum.

## Richard Elmore

As part of the International Thought Leaders programme that saw Terry Dozier, Ellen Moir, Janet Gless and Jan Miles share their ideas and innovative practice around Scotland, Richard Elmore visited Scotland in March 2007.

Richard is Anrig Professor of Educational Leadership at Harvard University. During his time with us he spoke at the Collegiality, School Improvement and Leadership Forum at Hampden Park, Glasgow and worked with colleagues from local authorities and schools. He focused on the strategies leaders in schools and authorities can use to help transform the fortunes of schools. He argued that schools that build capacity in a collegiate fashion and develop strong internal accountability systems will develop sustained continuous improvement. Central to his philosophy is the need to break down the isolation that colleagues can face at all levels when faced by the change process and he says 'Privacy of practice produces isolation; isolation is the enemy of improvement.' His work is particularly pertinent in the context of developing a **Curriculum for Excellence** and issues around **Closing the Gap**. A key part of the visit included a "Medical Rounds" pilot with Queen Anne High School in Dunfermline. Here Richard mediated classroom observations by deposes, principal teachers, staff from SCSSA and university personnel.

The impact of Richard Elmore's visit continues to be felt in a range of situations across Scotland. His simple mantra "If you can't see it in the classroom, it didn't happen" has been frequently quoted, and has helped many to ensure a focus on what really matters in education. His model of the "Curricular Core" has reminded us to take account not just of curricular content in our programmes of reform, but to consider the professional learning of our teachers, and the preparedness of our learners too. Most significantly perhaps, the Scottish Government has agreed to fund a pilot which will explore a Scottish model of the "Medical rounds" work that Elmore pioneered in the States. The pilot will address strategies that will support system-wide improvement in a number of contexts.

## Some conclusions

The Thought-Leaders programme was helpful in establishing that the focus on CPD and Leadership that followed TP21 was appropriate and was viewed as high quality by world "experts". It also supported our thinking regarding areas where we still needed to move ahead and improve practice. Although we have highlighted some of the areas where there has been direct influence from the programme, it is important to note that the impact of the visitors was far greater and more widespread than the case studies described here indicate. Examples of small but profound changes in thinking and approaches are evident across the profession.

Terry Dozier's work on Teacher-Leadership helped to reshape thinking in this important area, and has led to a much greater and more focussed understanding of this issue and the importance of developing clearer thinking on how we build leadership qualities in all educators

Ellen Moir and Janet Gless's work on mentoring is used in various forms in a very wide range of situations across Scotland. The CPD Team constantly stumble across those who are using the methods and proforma that they shared with us. As a result of the visits, close links have been established between Scotland and the New Teacher Center in Santa Cruz, and there have been a number of visits by Scottish educators to California to learn more, and this has influenced developments in several areas.

Richard Elmore's work has led directly to the Scottish Government funding a study into Learning Rounds - an investigation of how the work undertaken in the USA can be contextualised and made relevant to the Scottish scene.

In addition to these visits to Scotland, the Scottish Government were also able to support a small number of places at the Harvard Summer Schools on School Leadership in 2006 and 2007. A total of 18 Scottish educators spent 8-10 days working with American colleagues on a range of issues related to school leadership and school improvement. A recall day for all of those involved was held in autumn 2007, and this offered an opportunity to share outcomes and to reflect on further steps. The Scottish International Summer School Planning Group drew heavily on the advice of these colleagues in shaping the programme.

The commitment to learning from other nations remains strong. In April 2008 Patrick Duignan, Foundation Chair in Educational Leadership and Director of the Flagship for Creative & Authentic Leadership at Australian Catholic University will visit Moray and Dumfries and Galloway; Richard Tees, Raporteur of the OECD review - Quality and Equity of Schooling in Scotland will visit a number of authorities in September, and in July 2008, the second Scottish International Summer School will take place, giving Scottish educators access to the latest and most innovative thinking in school leadership.

## Appendix 1

### Scottish Executive/ Hunter Foundation Visiting Expert Programme Visit by Dr. Terry Dozier 25.10.05 - 04.11.05

Dr Dozier met with the National CPD Team on Wednesday 26 October 2005, and ran a Masterclass for local authority CPD Coordinators on Thursday 27 October. This paper is a summary of the many valuable ideas, insights, and comparisons that she brought to these occasions.

The visit by Dr. Terry Dozier is the first in a series of visits to Scotland by experts in the field of Education planned by the Scottish Executive and the Hunter Foundation. Dr. Dozier is the Director of the Centre for Teacher Leadership at Virginia Commonwealth University (VCU) School of Education, where she also serves as National Teacher in Residence and Associate Professor. In a distinguished career which includes 19 years of teaching in a wide variety of school settings, Dr Dozier was named the 1985 National Teacher of the Year before becoming Senior Adviser on teaching to former U.S. Secretary of Education Richard W. Riley, in the administration of President Clinton. In addition to being the Administration's top policy adviser on all matters relating to teaching, she led the development and implementation of a strategic plan to improve teacher recruitment, preparation, and ongoing professional development, including overall leadership in research, evaluation, and data collection on teacher quality. Her academic achievements include a B.A. and M.Ed. from the University of Florida, and an Ed.D. in Curriculum and Instruction from the University of South Carolina. Dr Dozier speaks extensively on issues related to teacher quality, and her current professional activities include membership of a wide variety of policy and advisory bodies at State and National level.

#### A CPD Master Class with Dr. Terry Dozier

An examination of another education system always illuminates one's own, and there was much in what Terry Dozier had to say about the issues, problems and solutions found in the USA, that resonated with the situation in Scotland. Many of the questions that she addressed are questions currently being addressed in Scotland; many of the principles that she enunciated are principles that we recognise.

#### Why focus on teaching?

In the USA there is now a strong focus on the importance of the quality of the teacher in delivering good learning and teaching. Several things came together to create this focus - concern about standards of educational attainment being achieved by pupils, and the findings of the National Commission on Teaching and America's Future (1996), being just two -

'Most schools and teachers cannot produce the kind of learning demanded by the new reform efforts - not because they do not want to, but because they do not know how, and the systems in which they work do not support them in doing so.'

The focus on the importance of the teacher therefore arose from

- The setting of attainment standards for pupils at all levels
- The need to ensure that teachers could teach appropriately to these standards
- Research on Value added which showed the gulf in attainment over three years between groups of pupils receiving good and poor teaching over that time
- Research which showed that poor teaching had a long-term effect on pupils
- Research which showed that teacher quality was a more powerful factor in pupil attainment than factors like class size or class organisation
- The demand for greater levels of teacher skill and knowledge in relation to ICT and other factors

Conclusion: poor teaching cannot simply be accepted with tolerant good humour as a 'character-building' experience for pupils. Good teaching practices on the other hand, are essential to sound learning and high achievement - and they can be taught. Professional development for teachers must therefore be given a very high priority.

### What is good CPD?

There has been a lot of research in the USA on this question. The findings of research are reinforced by what teachers themselves have to say about this - the professional development activities that are seen as being most effective in improving teaching are

- Activities lasting eight hours or more (i.e. not 'one-off' activities like courses or workshops)
- Activities in which teachers collaborate, such as team planning and mentoring
- Activities which require teachers to reflect on and develop their practice in some identifiable way

### What is actually happening?

When asked what their actual experience was of CPD activities, teachers reported that the experience was a mirror image of what they regarded as being good practice. Typically, they reported that CPD comprised mainly

- Activities lasting one to eight hours
- 'One-off' activities such as courses and workshops

Conclusion: we know both from research and from what teachers say what the characteristics of good CPD are, but this is not implemented in practice.

### 10 principles - and a commentary

The National Awards Programme for Model Professional Development recognises schools and districts that engage their staffs in high quality professional development. The Programme outlines 10 principles that must be addressed in achieving this:

#### Professional development

- *Focuses on teachers as central to student learning, yet includes all other members of the school community*

It is increasingly the case in Scotland that all staff in a school, both teaching and support staff, are given access to professional development. This may include staff of partner agencies working within the school; the Integrated Community School initiative is often the context for this.

- ***Focuses on individual, collegial, and organisational improvement***  
 While in Scotland the School Improvement Plan provides a context for collegial and organisational improvement, the professional development review meeting provides the forum within which reviewer and review can discuss not only the development needs arising from these, but also the needs arising from the individual teacher's own self-evaluation and career aspirations.
- ***Respects and nurtures the intellectual and leadership capacity of teachers, principals, and others in the school community***  
 A concept of school leadership which is based on a collegiate model of devolved leadership is gaining ground in Scotland. This would seek to develop and use the leadership potential and skills of staff at all levels in schools.
- ***Reflects best available research and practice in teaching, learning, and leadership***  
 There has been a great deal of research done in the USA in all these areas - considerably more than has been done in the Scottish context. There is potentially here a rich vein of insight and understanding from which Scottish practice could benefit and develop.
- ***Enables teachers to develop further expertise in subject content, teaching strategies, uses of technologies, and other essential elements in teaching to high standards***  
 It is not possible to make the assumption in the USA that all teachers will be educated to degree standard in the subjects they are teaching, as is the case in Scotland. While, therefore, are two systems may not share the same level of concern about basic subject competence, the development of good teaching strategies and the application of technology to learning and teaching is likely to be common to both. This will mean the opening-up of classroom practice to view and discussion to a much greater extent than has been the case up till now; if it is indeed the case that teachers themselves and their practice is the major factor influencing pupil learning, then what teachers do, and how this can be improved and developed, should be a major priority of any education system.
- ***Promotes continuous inquiry and improvement embedded in the daily life of the school***  
 There is a growing understanding that the workplace itself is a potentially rich source of professional development, one which can provide a wide range of opportunities to develop and apply knowledge, understanding and leadership and other skills. It is also increasingly acknowledged that developing teachers to support and develop one another would significantly increase the value to be gained from this form of CPD.
- ***Is planned collaboratively by those who will participate in and facilitate that development***  
 The National CPD Team in its visits to authorities and schools has come across examples of schools which have achieved a high level of staff participation in decision making in relation to CPD. This includes deciding CPD priorities for the school, the activities and means by which they will be delivered, and the allocation of resources. Where this has happened, there tends to be a high level of staff 'ownership' of CPD.
- ***Requires substantial time and other resources***  
 Acknowledged good practice makes it clear that the PRD interview should be a valued and important activity for all staff. As such, the time devoted to it should be sufficient, and prioritised. Authorities and schools in Scotland are well-resourced in financial terms to deliver good CPD.

- *Is driven by a coherent long-term plan*  
The development planning process at school and Authority level, together with the structure provided by the National Priorities and documents such as 'Ambitious Excellent Schools' should provide the necessary long-term direction and guidance, within which good CPD can develop and to which it can make a powerful contribution.
- *Is evaluated ultimately on the basis of its impact on teacher effectiveness and pupil learning, and this assessment guides subsequent professional development efforts*  
Assessment of the impact of CPD is acknowledged to be important, but seen to be potentially difficult. In Scotland, ways are beginning to be sought as to how this can be achieved, with a clear focus on the benefits to pupils and their learning. Where teachers see that CPD is making a difference to themselves and to their pupils, they will engage with the process; where governments and education authorities see this, they are all the more likely to support and resource it.

### National Board Certified Teachers

There has been, in the US, a move to develop and to accredit advanced teaching skills in experienced and competent teachers. The advantages to be gained from such a development are seen to be

- The cultivation of a largely untapped resource for change and improvement in schools
- Keeping good teachers in the classroom
- Benefiting pupils
- Providing head teachers with much needed assistance

In practical terms, such teachers are thought it to be able to

- Model effective practice
- Mentor new and struggling teachers
- Lead professional development activities
- Raise the level of collaboration between teachers in school
- Be effective advocates for pupils and for the profession

The qualification itself is designed to be high quality CPD for the teachers taking part, and it is Standards based; the Board has developed 27 different Standards covering a variety of areas and levels in school teaching. It is not a lifetime qualification, and teachers must seek re-accreditation after 10 years; teachers gaining this qualification are not automatically entitled to salary increase although they do have to pay the costs. Teachers value the qualification, and regard to the experience of undertaking it as being very high-quality CPD.

The Board itself is a voluntary, non-profit making organisation which is supported by sponsorship from industry and commerce, and individual gifts and donations. From small beginnings in terms of numbers of teachers involved, there are now over 40,000 teachers whom it has certified. The target is to have 100,000 such teachers by the end of this decade, which would be roughly equivalent to one such teacher for every school in the US. There are interesting comparisons to be made and points of difference to be explored between this concept, and the Scottish concept of Chartered Teacher.

## Give One - Get One

This proved to be a brief, but most interesting exercise in realising the potential that lies within a group - the idea was that each individual should circulate round all other members of the group, giving an idea to each in terms of a useful CPD activity, and gaining from each another idea in return. One participant emerged with the following list:

- Authorities to manage 'acting' post opportunities for the purposes of CPD
- Mentor support, and training for supporters
- Classroom-based practitioner for research
- Remit change over time
- Networking opportunities for staff in similar posts, in the same subject areas, or with the same specific area of interest in teaching and learning
- Classroom teachers delivering CPD to colleagues
- Participating in a working group at school or cluster level
- Shadowing colleagues in school or another schools
- Peer coaching
- Creating leadership opportunities for teachers within schools
- Developing teachers as a school or authority resource in specific areas
- Developing a school resource for professional reading

It is very likely that the same exercise carried out with a similar group of people in the US, would produce very similar results. Clearly, a similar view of CPD as being much more than attendance at courses is developing strongly on either side of the 'pond'.

## Appendix 2

### Terry Dozier's Reflections on Scottish Education September 2006

Since my initial visit to Scotland in November 2005, I have observed the following exciting developments:

- **Educators have moved beyond the McCrone Act** and concerns about documenting the mandatory 35 hours of CPD and are focusing on what matters most - improving teaching and learning.
- **Increased emphasis on teacher professionalism** with the flexibility provided by the Curriculum for Excellence. Teachers are clearly being given options and choices in how best to achieve the pupil outcomes outlined in the Curriculum for Excellence.
- **Increased understanding of the principles of high-quality CPD** and efforts to go beyond "courses." Most notably is an interest in and commitment to "coaching" as an effective approach to improving instruction for beginning and veteran teachers.
- **Strong emphasis on developing and strengthening "leadership for learning" at all levels.** There is an understanding in the authorities that I visited that teacher leadership must also be encouraged and nurtured to achieve desired results for pupils.
- **Positive support for the work of the National CPD Team.** Authorities find the networking and support provided by the National CPD Team to be invaluable. The establishment of the National CPD Office is a powerful message to the profession of the importance and value that the Scottish Executive places on teacher development. I am not aware of any other country or state within the United States that has made such a high profile commitment to CPD.
- **Conscious efforts to establish a Scottish presence in the world.** Building on its rich history of excellence, Scotland is positioning itself to be an international convener of ideas. The international conference being planned for this summer will provide a platform upon which to catapult Scotland on the international scene. The Scottish education system is vibrant and strengthened by the willingness of its leaders to submit to healthy examination and questioning from colleagues in other countries and to invite other perspectives, something that is not routinely done in the U.S.

- **Increased pride and self-confidence among Scottish educators.** There is a palpable excitement in the air due to an increased sense of national pride and a growing belief that Scotland can be the best in the world in education. The infrastructure is in place to achieve this goal:
  - *Curriculum for Excellence:* The Curriculum for Excellence provides the framework to make Scotland the best in the world in education. Rather than following the U.S. and English model of focusing on testing, Scotland is focusing on learning. Testing may give an initial boost in pupil achievement, but long term growth will only happen when educators focus on improving learning.
  - *National investment and emphasis on CPD:* Improving learning can only happen when you focus on strengthening teaching. The Scottish Learning Festival and the National CPD Office are two examples of high profile and significant investments that the Scottish Executive is making to improve teaching and learning.
  - *Newly Qualified Teacher Program:* This program continues to be the “crown jewel” of Scottish education reform efforts. The program has created a new class of teachers who believes that CPD and continuous improvement is the responsibility of all teachers and will contribute to increased teacher professionalism.
  - *Chartered Teacher Program:* The Chartered Teacher Program is identifying exemplary teachers who are increasingly becoming leaders within their schools and the profession. The university route to chartered teacher status provides a means to develop accomplished teachers through a process that both challenges and support teachers seeking this designation, thus increasing teacher professionalism and effectiveness throughout Scotland.
  - *Scottish Teachers for a New Era:* The work being done at Aberdeen University to involve classroom teachers in redesigning and implementing all aspects of teacher education provides a mechanism for increasing professionalism and growing teacher leaders.
  - *GLOW:* The Scottish Executive’s investment in technology infrastructure for education is impressive and will position Scotland as a world leader. Once fully operational, GLOW’s potential to enhance teaching and learning is limitless.

## Cautions

While the infrastructure is in place to make Scotland the best in the world in education, I offer a few words of caution below:

- **Do not underestimate the time and investment needed to help teachers become leaders.** Teachers have been taught to be passive. After years of being treated as “hired hands” who were told what to do, it will be difficult for many teacher to adapt to new professional expectations and leadership roles. CPD and support from head teachers will be critical. “Nothing changes in an organization unless people change, and it takes a significant investment in helping them to do so.”
- **Avoid “Initiative Overload.”** Scottish teachers are feeling overwhelmed by the pace and amount of change. It is better to build on the infrastructure that is in place to nurture and grow the programs that you already have, rather than to try to do too much too quickly. In the U.S. policy makers have tried to “mandate excellence” without creating the infrastructure that you have begun to build in Scotland. The result is a very demoralized profession in many parts of the U.S. Scottish schools and pupils will benefit from the emphasis you have placed on CPD and a critical mass of newly qualified teachers and chartered teachers who will lead colleagues in responding positively to the new expectations for the profession.
- **Consider including some type of classroom observation as a criterion for chartered teacher status.** I was surprised to learn that chartered teachers do not have to demonstrate their teaching skills. This could lead to excellent writers but weaker teachers earning this designation. If this becomes common, the chartered teacher program could lose credibility among the profession and the community. The U.S. National Board Certification process requires teachers to submit at least one videotape of a lesson that meets the National Board standards. Teachers must include a written commentary that explains why they chose the lesson, analyzes what happens in the lesson, and explains how they know it was effective. Because the National Board process is voluntary and American teachers select the videotape and lesson, teacher unions have raised no objections.
- **Ensure consistency and quality is the selection process and training for mentors in all authorities.** Mentors must be strong role models who want to work with new teachers and have been trained in coaching, observation, and assessment strategies to help new teachers improve their practice. U.S. experience suggests that the selection of mentors cannot be left to the head teacher. It should be a process in which veteran teachers seek this leadership role and are selected through a competitive process. Ellen Moir's work in Scotland has laid a foundation upon which Scotland can build a consistent, high-quality training for all mentor teachers.
- **Determine the appropriate role for organizations involved in leadership and CPD.** There seems to be a plethora of organizations that are offering training to teachers and administrators throughout Scotland. There is a need to identify all of the organizations involved in leadership and CPD and to determine how best to build on their work so that you avoid replicating efforts.

Scottish leaders have articulated a clear vision for education and built an infrastructure to achieve that vision. This, coupled with Scotland’s egalitarian tradition and its willingness to learn from other nations, positions Scotland to realize its goal of becoming the best in the world in education.

## Appendix 3

Terry Dozier's Programme September 2006	
21 <sup>st</sup> September	Keynote Address at SLF in Glasgow "Turning Good Teachers into Great Leaders" followed by an informal seminar and reception for an invited audience on "Promoting and Supporting Teacher Leadership"
22 <sup>nd</sup> September	In Elgin Promoting and supporting Teacher Leadership - audience of 50 - 60 school based CPD Coordinators Seminar + Workshop Pm: Turning good Teachers in to Great Leaders" - audience of 50 - 60 headteachers
25 <sup>th</sup> September	In St Andrews Fife Headteachers Conference "Leadership for Learning" "Importance of CPD and crucial role of school leaders in promoting appropriate attitudes and motivation" Approx 200 delegates
26 <sup>th</sup> September	In North Lanarkshire School Leaders' meeting - all sectors Where does CPD fit with quality education? What is good CPD? How does it impact on teaching and learning for maximum impact? Way Ahead - Co-operative learning strategies Workshops and implications
27 <sup>th</sup> September	In Midlothian/East Lothian/Scottish Borders Leadership for Learning An audience of approx 200 headteachers and senior local authority staff The role of headteachers and senior managers in promoting leadership at all levels, focussing on effective CPD practices and creating networks which encourage reflection and deep learning
28 <sup>th</sup> September	In Edinburgh "Chartered Teachers - <i>Engaging and Supporting Professional Learning</i> ". Chartered Teachers, their supporters and other interested parties (20 - 25). How to develop good practice in maximizing the impact of these excellent teachers.

## Appendix 4

### Ellen Moir and Janet Gless: May 8<sup>th</sup> - 19<sup>th</sup> 2006

May 8 <sup>th</sup> and 9 <sup>th</sup>	In Edinburgh "Engaging and Supporting Professional Learning" to an invited audience
May 10 <sup>th</sup>	In Aberdeen STNE workshops Seminar with School of Education Staff from Aberdeen University, Twilight for teachers on Coaching, Mentoring, CPD and beyond
May 12 <sup>th</sup>	Keynote address at Aberdeen SLF "The impact of mentoring on teacher professional development"
May 15 <sup>th</sup>	In Moray Coaching Seminar and workshop for all Moray headteachers
May 16 <sup>th</sup>	In Edinburgh Foundations of Mentoring Course Day 1 for 50/60 school based coach/mentors
May 17 <sup>th</sup>	Foundations of Mentoring Course Day 2
May 18 <sup>th</sup>	Glasgow University Faculty of Education seminar for university staff
May 19 <sup>th</sup>	In Livingstone Meeting with HMIE

## Appendix 5

Janet Gless and Jan Miles

Observations on their visit to Scotland in February/March 2007

On their return to Santa Cruz in March, Janet and Jan shared the following observations of their work with Scottish educators:

- They were impressed by the passion and vision of the Scottish educators they worked with across the spectrum: from university faculty members and tutors to classroom teachers and mentors to head teachers to those working at national and authority level.
- There is a passion for and commitment to excellence and quality at all levels and an openness to consider new approaches and strategies.
- They also noted a hunger or eagerness for capitalising upon the remarkable induction scheme that Scotland has already crafted for its beginning educators to ensure a high quality induction experience for all first year teachers.
- They also heard many educators, at all levels of the system, wanting to consider mechanisms for supporting new teachers in their second and third years -- beyond the scope of the present induction policy.
- Janet and Jan were impressed time and again with the general eagerness to consider new ideas and ask thoughtful questions that indicated a desire to draw applications to each educator's personal or local context.
- They expressed their enjoyment of the discussions that often took place during the trainings. Even acknowledging that one-time, workshop-style professional development does not necessarily lead to implementation, they felt that there were many "aha's" -- both new insights as well as validations of what educators were already practicing in their local authorities.
- They suggested strongly that there is a rather exciting window of opportunity here that could lead to some rather substantive advances in how local authorities implement the current induction scheme along with some new policies that could help support those changes.
- A strong desire was noted on the part of Scottish educators to promote and implement mentoring/coaching models for all educators, not just the newly-minted classroom teachers. Many spoke of their interest in developing professional learning communities and strategies for advancing the quality of classroom instruction across the professional spectrum.

There is already emerging evidence that a number of colleagues across Scotland have made changes to induction programmes for probationers and their mentors following on from Ellen and Janet's visit last year.

From the course evaluations, discussion which took place over the recent two weeks, and Janet and Jan's observations, it is evident that these two courses will have an impact on existing programmes for probationers and new teachers within authorities and schools.

## Appendix 6

	Visit of Richard Elmore to Scotland March 2007
24 March	North East educationalists dinner
26/27 March	In East Ayrshire Working with local authority
27 March	Dinner with Tom Hunter and local educationalists
28 <sup>th</sup> March	In Glasgow Collegiality and school Improvement Seminar for 150 delegates
29 <sup>th</sup> March	In Fife Model of Medical rounds with Faculty Leaders
30 <sup>th</sup> March	In Glasgow Local Authority Officers, QIOs System wide Improvement
30 <sup>th</sup> March	In Livingston Meeting with HMIE
30 <sup>th</sup> March	University event hosted by Glasgow University

## Appendix 7

### Illustrative Case Study 1 Coaching and Mentoring in Moray

Ellen Moir visited Moray during her visit to Scotland. Her presentations and seminars generated much thought and discussion for us in Moray. Ellen's leadership style focuses very much of the importance of people and relationships. She seeks to develop people in order to "grow" her organisation. This people focused approach chimed with our desire to develop the Vision and Values work in Moray and our plans to develop leadership at all levels through coaching and mentoring.

A subsequent study visit to Santa Cruz offered an incredibly powerful learning experience which has had an immense impact on my practice back here in the U.K.

The work in Moray to support Newly Qualified Teachers (NQTs) had been adapted and developed as a result of learning from the NTC. We are now piloting the use of a central mentor for NQTs.

The central mentor, who is employed on a full time basis, works with 12 probationers. Support offered by the mentor follows the patterns and practices of mentors in California. Weekly support is offered to the NQTs in a variety of forms - discussion, modelling good practice, observations and so on. All interactions are conducted in a facilitative manner, although some conversations may be instructional or collaborative as well as facilitative. This blended coaching approach is proving to be very successful. All discussions use an amended formative assessment tool adapted from those developed by the NTC. This is very clearly linked to the standard for full registration. Initial evaluations of the pilot indicate very positive results. The NQTs report that conversations and support has really engaged them in thinking about their practice rather than simply finding immediate solutions to individual issues.

We have also developed support and training for the mentor. We make use of a weekly meeting working as a Professional Learning Community (PLC) along with identified training sessions. The mentor has a coach who observes and assists her to develop practice as a mentor/coach. Of course the challenge is to evaluate our pilot robustly. Our long term evaluation, which is underway, includes a variety of strategies which we hope will allow us to gauge the impact of the pilot project on the NQTs, the pupils and the mentor herself. Another aspect of my work which has been influenced by the Santa Cruz visit is that of developing Professional Learning Communities (PLCs) in Moray. Witnessing the way in which groups functioned as PLCs in the NTC gave me a real insight and starting point for some very practical developments here in Moray. Bridging the gap between what we wish to achieve and where we currently stand is always difficult!

Since returning to Moray I have taken some very practical steps to assist groups develop as effective PLCs. We have reviewed and developed meetings and coaching support for newly appointed Head Teachers, introducing the use of the NTC meeting format to make meetings more effective.

These meetings now fall into a pattern which includes:

- Connection (mentor/coaching in pairs)
- Learning (activities and collaborative groups)
- Management (maximum 15 minutes)
- Summing up (issues arising, etc)

Already those involved find the new approach much more helpful and purposeful and are building up the sense and practices associated with a PLC and work with all Head Teachers is underway to assist the development of PLCs in schools.

Development work in Leadership continues to focus on mentoring and coaching and, here again, we have found that the focus given by the formative assessment tools has been beneficial. The challenge here is to develop leaders who are emotionally intelligent individuals with the ability to lead schools into the future. Our leadership courses which we run within Moray all feature coaching skills as a key element.

Developing a coaching base which helps us deliver transformational coaching experiences to leaders, especially in their early year as DHT/PT, is a challenge which we are now facing.

My account features a few illustrations to give an indication of the influence which Ellen Moir has had in Moray. Learning about the development of people as probationers, mentors, leaders and teachers has impacted in my setting as it has offered the opportunity to make connections across much of the work that I do. We continue to develop and grow as we think and link the learning gained from NTC to the work and vision for Moray.

## Appendix 8

### Illustrative Case study 2 Coaching in Longforgan PS

I attended a course in May 2006 which was presented by Ellen Moir and Janet Gless. The course was to share with us some of the good practice among probationers and their mentors in America. As part of the training the mentors use a range of pro-forma when observing or meeting to give feedback. I was impressed with the simplicity of the forms and felt that we could adapt them to use in our classrooms.

My first development was using the GTC standard for full registration. I adapted the collaborative assessment log to have our standards and codes included rather than the American standards. This was initially to use with probationers. The log was to be used in the same way as the American version in consultation with the probationer, in a coaching method to get them to identify their strengths and next steps. This proved to be very successful and the information being gathered through the log could be transferred into the Interim and Final profile as it had identified the key target areas which needed developed and the probationers' strengths. The probationers I have used the log with have all been able to see the links with their formal reports and the approach has made it easier for them to identify where they have needed assistance in their teaching.

Having successfully developed the probationer log I used the information in the student assessment guidelines to construct a similar document to be used with students. This gathered information which could be used when completing their placement reports. This has also proved to be a good tool in the students' understanding of how to self evaluate.

The probationer assessment log has also been used as part of our school peer monitoring and classroom observations. It is used in a coaching way to give the teachers a means of discussing what they feel is going well or something which they may need assistance with. It also gives the teachers a structure to aid their discussions and reminds them of the standards which we should all be achieving in our teaching.

I have shared this development with other teachers and mentors within our authority and other authorities in Scotland. The feedback I have had has been very positive and I hope that it has helped others in their role as mentors.

If you would like any other information or copies of the collaborative log proforma please contact me.

Victoria McCarthy  
PT Longforgan Primary

## Appendix 9

### Illustrative Case Study 3 Elmore's Visit to Queen Anne High School

As part of the Elmore visit to Scotland in March of 2007 a trial took place of the medical rounds model in a Scottish context. On 29 March a team of 14, made up of 9 school, 1 authority and 4 university personnel, spent a day in Queen Anne High School in Fife observing classes and discussing the results. School colleagues, consisting of PTs and DHTs, came from schools around Fife, with two colleagues from Queen Anne itself.

The school colleagues were briefed by Graham Thomson, Director of SCSSA a week before the visit. Within this briefing some basic protocols were established and Queen Anne's aims for the day were discussed. These included the key issue of challenge to pupils regardless of their ability. The process on the day broke down as follows:

**0830.** Briefing of whole group by Elmore. Here he discussed the procedure:

- use of descriptive voice
- no judgments to teachers
- groups of people observing same class at different time frames and so on.

**0900 - 1200** Observation of volunteer classes ranging over English, Maths, Modern Languages, Technical, Science, Social Subjects and Art. The group of 14 broke into 4 teams of either 3 or 4. Teams 1 and 2 visited a different class for the first half of the lesson and then swapped round for the second half. This alternating continued through the morning until 6 separate episodes of class teaching had been observed in six different subjects. By the end of the morning teams 1 and 2 had seen the same classes with the same teacher but at different times. Teams 3 and 4 did the same but with different classes.

**1200 - 1330.** Each team discussed what they had seen amongst themselves. They were restricted to the descriptive voice only and were not allowed to make judgements or indeed any sort of evaluative comment. Lists of descriptions were then drawn up. These reflected the questioning techniques of teachers, the sorts of higher and lower order questions that were used, positions of pupils, levels of challenge in lessons and so on. This process was extremely hard for all concerned and they constantly slipped into the evaluative voice e.g. "I was disappointed to see" or 'The teacher should have done this'. A member of the group was assigned, as part off the protocol process, to take issue with this and get people back on the descriptive track.

Once this process was finished the group agreed the evidence and then met with the mirror group to put both pieces of evidence together. It was surprising how similar the groups' results were even though they had observed the same classes at different times.

1330 - 1415. Elmore brought all groups together and mediated a discussion on what had been seen and learned. There was a large degree of consensus as to the evidence.

Since we were 'hot housing' a process that takes longer in the USA, Elmore invited evaluative comments from the groups. These were collated.

1415. Briefing to members of SMT and some PTs by Elmore and the group. Elmore listed the various observations including a number of significant strengths. The feedback given reflected these and these strengths were later shared by the Rector with the whole staff.

### Conclusion

While too much was crammed into one day, this was an intensely interesting learning process for all involved. The medical rounds model with groups involved in both observation and follow up discussions is one that has real merit. It offers a mechanism that is non-threatening but can develop real and sustainable change. It was the first time any of the experienced managers had been involved in joint collaboration around lesson observation. All had done lesson observations but always as the sole observer. Interestingly, in the immediate post observation discussion, groups struggled to find a common language. People used different terms to describe similar events. It was only as the discussion progressed that agreement developed around not only about what people were seeing but what they were describing. As the confidence of the group grew colleagues began to explore ideas around what they had seen. While not strictly in the descriptive voice this was an interesting experience and many of the group wished, as a result of the 'skilling'

### Further work

With funding from Learning and Teaching Scotland the school has taken the work forward within an Associated School Group project which has been well received by staff. The group is made up of staff from the High school and thirteen associated primary schools. The research project is looking at peer assessment with lots of visits, and sharing taking place, between schools where schools are modelling success.

## Contact us

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