

Chapter 9

The Changing Role of the Headteacher in Scottish Education: Implications for Career-Long Teacher Education



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Abstract This chapter critically explores educational policy directives related to the changing role of headteachers (principals) and considers the implications for career-long teacher education. It interrogates changing policy articulations of the role of the headteacher internationally then, through thematic analysis, the Scottish context in ‘An Empowered System’ (Scottish Government, 2019a) (hereafter SG) and the Professional Standards (General Teaching Council for Scotland, 2019a) (hereafter GTCS). The three themes identified: *Cultivating Culture*, *Privileging Context and Community* and *Leadership of Professional Learning* are synthesised to generate understanding of the expectations of headteachers to develop and lead collaborative cultures of professional learning. The chapter draws on findings from the ‘Future of Headship’ data, generated through the Delphi Method, to examine the tensions and issues experienced by school leaders in their leadership of learning communities in a case study school. The chapter concludes by considering the implications for the role of headteachers in leadership of career-long teacher education.

Keywords Headship · Middle leadership · Professional learning · School culture · Context · Community

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9.1 Introduction

This chapter examines shifting constructions of the role of the headteacher in the development of career-long teacher education, using the Scottish education system as a case study. Internationally, the role of headteachers (principals) has evolved considerably over the past thirty years. Emphasis has shifted from management and administrative functions to school leadership as a collective endeavour that nurtures and harnesses the strengths, self-efficacy and agency of teachers at all levels to improve student learning and outcomes (Torrance et al., forthcoming). Current global constructions of headship emphasise the importance of collaborative leadership, the centrality of teacher professionalism and the development of schools as learning organisations underpinned by a culture of professional learning, support and challenge.

The Scottish education system provides an interesting case study of the role of headteachers in the development of career-long teacher education. A stated policy purpose of ‘The Empowerment Agenda’, (SG, 2017a), is the creation of a “school and teacher-led education system” (SG, 2017a, p. 4). A key tool intended to realise this, the Headteachers’ Charter, is designed to re-shape the role of headteachers. Central to this role is an expectation that headteachers lead learning communities, thereby having a critical role in the career-long development of teachers. A central impetus behind the Empowerment Agenda is an enduring attainment gap between pupils from advantaged and disadvantaged backgrounds (SG, 2021b). Schools are charged with ‘closing the gap’ but this construct of ‘gap’ is reductionist, based largely on performance targets. An alternative, less reductionist idea, is that of an ‘opportunity gap’, an approach which becomes particularly important for schools serving disadvantaged communities where it is critical to draw on, rather than ignore, problematise or diminish the resources of the school and its communities. The COVID-19 pandemic has amplified the need for headteachers to ensure their school’s context underpins its continuing development as a learning community as they navigate the mandated professional learning requirements descending from central government reforms.

The policy expectation around the headteacher’s role to lead learning communities, signals an emphasis on collaborative practice within and across schools. We need to examine the ways in which these learning communities enable teachers to understand and be responsive to the communities of the school. In this, teachers need opportunities to build their collaborative practice with their colleagues in school, pupils and parents and the wider community, colleagues in other local schools, and other professions (Mitchell, 2019). We also need to examine potential tensions between efforts to support and enhance teachers’ sense of agency and self-efficacy as education professionals, within hierarchical school systems. Findings from this exploration have implications for other education systems facing similar challenges.

The chapter draws from a multi-strand research project, ‘The Future of Headship’, where policy analysis is combined with investigating the lived experiences and practice of headteachers (Torrance et al. forthcoming). This chapter draws from

two components of the project. The first, builds on an analysis of the policy problem (Bacchi, 2012) to examine policy intentions (Taylor, 1997), through a content analysis (Braun & Clarke, 2006). The second, draws from data gathered using the Delphi Method (Green, 2014) with school leaders. In particular, we examine policy expectations around headteachers “leading learning communities” (SG, 2018a, p. 1) to explore the implications for the understandings and practices of career-long teacher education.

9.2 Analysis of the International Policy Problem: Neoliberalism and Policy Borrowing

In this first section of the chapter, the Scottish experience is situated within international developments, including specific discussion of neoliberalism, the effects of policy borrowing and alternative constructions of policy learning. Headteachers are navigating key education policy problems identified by governments across the globe, where policy borrowing has become the norm, partly as a response to the search for quick and inexpensive policy solutions. This provokes challenges to a local, contextually defined ethical enactment of headship, where tensions exist between performativity and social justice, with gaps between pedagogical vision and practice. Although Scotland has its own education system with devolved responsibility (UK Government, 1998), distinct from other United Kingdom jurisdictions, through policy borrowing, many of its education policy themes are reflected in international contexts.

9.2.1 *Neoliberalism*

Neoliberalism has become a pervading ideology in recent decades, beyond global economies to impact on spheres of public life, including education (Erss, 2015; Sellar & Lingard, 2013). One of the aims of neoliberal education policy is to create a stronger link between the economy and education. The rationale for this, is that gaps in the skills market can be filled by young people entering the world of work (Apple, 2001) although to perceive this as a linear process significantly underestimates how complex this supply–demand relationship is (Humes, 2013). Nevertheless, the idea that schools and other educational establishments align with what could be termed a ‘marketized’ ideology is prevalent in many educational systems across the globe (Smythe, 2021).

Arguably, schools are not comparable to other market-driven institutions, as they function within highly complex ecosystems (Smythe, 2021). To apply market principles to education is to take an oversimplistic view as key factors influence, constrain

and shape decisions and actions taken: schools work within differing local communities, serving pupils with a huge variety of abilities, needs and cultures; working with young people places unique obligations and demands on staff; schools exist within a social, economic and political framework, where accountability and performativity are prevalent. As such, the headteacher role is not directly comparable to that of leaders in other organisations. These high levels of complexity signify that educational systems and structures need to change to facilitate a ‘reflexive’ process of accountability, allowing the voice of school leaders to be heard, so that their beliefs and actions are taken into consideration (Ranson, 2003). This would result in values being balanced against political constraints (Greenfield & Ribbins, 1993), with the generation of a shared understanding, making sense of and informing social order (Ranson, 2003). Given the effects of policy borrowing, this is unlikely.

9.2.2 *The Effects of Policy Borrowing*

Increasing pressure has been placed on education systems across the globe to perform successfully in relation to international and comparative measures, determined by transnational organisations such as the Organisation for Economic Cooperation and Development (OECD) (Pashiardis & Johansson, 2021). Comparative data dispensed by the Programme for International Student Assessment (PISA), the Third International Mathematics Science Study (TIMSS) and the Teaching and Learning International Study (TALIS) influence policy, as governments strive for good results and international league table rankings. The homogenisation of policy has followed with ‘policy borrowing’ emerging between countries (Priestley, 2002; Sahlberg, 2007), where features of overseas policies are taken and adapted to fit a new context.

Policy borrowing can be seen in action with the similarities evident between recurrent trends and themes in the *New Basics* project in Queensland (2001), *Curriculum for Excellence* (2004) in Scotland, *The National Curriculum of New Zealand* (2007) and *The Ontario Curriculum* (2009). One such theme is that teachers are now being placed as ‘curriculum makers’ rather than ‘curriculum implementers’. However, curriculum development is increasingly being recognised as a highly complex process (Alvunger, 2018; Muller & Young, 2019; Priestley et al., 2021; Vernon, 2020). It requires teachers to engage with questions around, for example, the purposes of education, values, the place of knowledge and skills, pedagogy and social justice. Giving schools more agency in curriculum making may sound a positive move but if it is accompanied by narrow performative measures such as benchmarking, attainment data, league tables and external inspection regimes, then it skews what schools do in terms of developing a curriculum fit for their unique context (Priestley et al., 2021). This tension can lead to additional pressure and challenge for school leaders.

Another theme is the policy construction that school improvement is more likely to follow if school leaders have more autonomy to make decisions at a local level (Sinnema & Aitken, 2013). Policy effects of this—intended or unintended—include increased accountability for teachers and senior leaders, augmented assessment

regimes and changes to working conditions and professional cultures (Modeste et al., 2020). This is particularly apposite in the Scottish context, where educational leadership is at a crucial juncture given the persistent impact of the pandemic, the heightened emphasis on issues related to poverty, inequality and discrimination and the Review of Education Governance in Scotland (SG, 2017), amidst current policy reform (SG, 2021a). However, new iterations and experiences of educational leadership are challenging the neoliberal preservative that has traditionally been the lens through which the success of schools is judged.

9.3 Policy Expectations of the Headteacher's Role: Analysis of Key Policy Texts

Education is a critical policy imperative in Scotland, largely due to it being a small centralised system with an administration aiming for greater consistency and uniformity, seeking to be defined by their record in education (SG, 2016a). Scotland's comprehensive school system and the quality and professionalism of the teaching workforce were recognised as strengths in the *Debate on Schools for the Twenty-First Century in Scotland* (Munn et al., 2004), that initiated and informed Scotland's Curriculum for Excellence (SG, 2008). More recently, declining performance in globally valued success measures, such as the Programme for International Student Assessment (PISA) (OECD, 2015; SG, 2016b, 2019b), has contributed to Scotland's policy turbulence, with increased scepticism around the success of *Curriculum for Excellence* in practice. This has fuelled criticism from the current Scottish Government of the profession and of educational leadership.

In rational and ascribed standards for school leaders, germane to many European and international systems, the headteacher role is perceived as central to system-wide efforts to raise achievement and to address an attainment gap (Cruickshank, 2017). In this next section of the chapter, changing policy articulations of the role of the headteacher are interrogated (Taylor, 1997). Findings from a thematic analysis (adapted from Braun & Clarke, 2006) consider: the role of the headteacher within the Headteacher Charter (SG, 2018a) and the Standard for Headship (GTCS, 2021b); and at teacher level, through the empowerment framework "Empowering Teachers and Practitioners" (SG, 2018b) and the GTCS Standards for fully registered teachers, and Career Long Professional Learning (GTCS, 2021c, 2021d).

9.3.1 *Thematic Analysis of the Role of the Headteacher in Scotland*

Over the past five years, educational reform in Scotland has been relentless in the pursuit of the twin aims of excellence and equity, through The National Improvement Framework (NIF) for Scottish Education, (SG, 2019c). The NIF highlights six key

drivers, including school leadership and teacher professionalism, to enable continuous improvement of the education, and life chances for children and young people, by closing the poverty-related attainment gap. The responsibility placed on school leaders (and therefore teachers at all levels) to ‘raise the bar while closing the gap’ (SG, 2019c) creates tensions in reconciling the incompatibility of social justice practice with the dominance of an accountability-led educational policy climate. This challenges teachers’ values and integrity, impacting on their professional identity and agency as education professionals (Verger & Parcerisa, 2017).

The focus of the Future of Headship project is on the practice realities of leaders in school. Given the significance of policy in the role and work of headteachers, a critical approach to the analysis of policy was adopted. One of several concerns of critical policy analysis noted by Diem et al. (2014) is the gap between policy rhetoric and practice reality. As a first step, relevant policy documents were scrutinised through a thematic analysis (Braun & Clarke, 2006), which examined at a latent level the “underlying ideas, assumptions, and conceptualisations” (2006, p. 84) of school leadership and teacher professional learning within the professional standards (GTCS, 2021b, 2021c) and the ‘Empowered System’ (SG, 2019a; 2019b). The thematic analysis followed a six-step framework adapted from Braun and Clarke (2006), to analyse the role of the headteacher within the Headteacher Charter (SG, 2019a) and the Standard for Headship (GTCS, 2021b), and at teacher level, the empowerment framework “Empowering Teachers and Practitioners” (Education Scotland, 2019) and:

- The Standard for Full registration (GTCS, 2021c)
- The Standard for Career-Long Professional Learning (GTCS, 2021d)
- The Standard for Middle Leadership (GTCS, 2021e).

The six-step framework for the thematic analysis involved:

- (i) Initial reading: Familiarisation with the policy texts
- (ii) Coding: Identification of keywords and repeated patterns of meaning
- (iii) Categorisation of codes into broader themes
- (iv) Identification of overarching dimensions of school leadership, empowerment and professional learning as understood in the key texts
- (v) Analysis of the key themes and assumptions within the conceptualisations of headship and professional learning
- (vi) Synthesis: implications for professional learning.

This section focuses on the identification, analysis and synthesis of the key themes underpinning conceptions of headship in relation to empowerment and Career-Long Professional Learning (CLPL).

9.3.2 The Revised Professional Standards

Stefkovich and Begley (2007) stress the exigency for school leaders to know their own values and ethical predispositions, with ethics “highly relevant to school leadership as rubrics, benchmarks, socially justified standards of practice, and templates for moral action” (2007, p. 209). In Scottish education, the values of social justice, trust, respect and integrity, highlighted in the Standard for Headship (SfH) (GTCS, 2021b), are asserted to underpin school leaders’ and teachers’ professional practice. The professional standards have been through several iterations since 1998 (Fig. 9.1), with values and equalities underpinning each iteration of the SfH. Through successive revisions, the focus has evolved from competencies and key management functions required to improve teachers and schools (Scottish Executive, 1998), to the parallel emphasis on social justice and equity issues, with the expectation that all teachers now contribute to school leadership (GTCS, 2021c).

In 2021, Scottish education embarked on the formal enactment of the revised Professional Standards, including the SfH (GTCS, 2021b), the national framework for aspiring and practising headteachers that provokes reflection on what it means to be a [head]teacher in Scotland: sense of identity and purpose; perceptions and expectations of others; “establish[ing], sustain[ing] and enhance[ing] a positive ethos and culture of learning through which every learner, including colleagues, is able to learn effectively and achieve their potential” (GTCS, 2021b, p. 6).

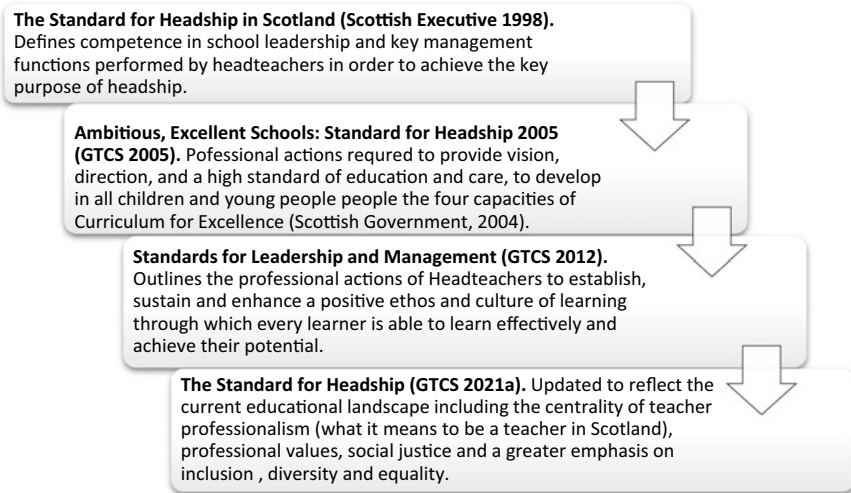


Fig. 9.1 The development of the *standard for headship*

9.3.3 *An ‘Empowered System’*

Part of the tension in the construction of headship is explored through a theoretical thematic analysis of ‘An Empowered System’ (SG, 2019a) which aligns the responsibility for closing the poverty-related attainment gap placed on schools—and more specifically on headteachers—with education. Education is being held to account for addressing wider socio-economic issues (Sahlberg, 2021). Schools are perceived as embodying “the social fabric that has reciprocal relationships with social, health, cultural and economic aspects of life” (Sahlberg, 2021, p. 17).

9.3.4 *The Headteacher Charter*

In the latest cycle of change, a policy solution between central and local governments involved the development of ‘The Headteachers’ Charter’ (SG, 2019a), intended to increase the autonomy of headteachers. Central to this development are ideas around collaboration, empowerment of the school community and working in partnership to bring about improvement.

9.4 Themes Arising from Analysis of Key Policy Documents

A key theme in the Future of Headship research programme involves tracing the way in which the role of the headteacher in Scottish education has evolved and indeed, continues to evolve. Part of the current impetus for the changing construction of headship has been the increasing emphasis on ‘leadership at all levels’ in schools (Forde & Torrance, 2021), alongside the focus on career-long teacher education, where engaging in ongoing professional learning is now central to understandings of what it means to be a teacher/leader. This third section of the chapter discusses key themes arising from the analysis of key policy documents.

The Headteachers’ Charter (SG, 2019a) highlights the specificity of the role of headteacher as a leader “open to constructive support and challenge” who is both responsible for the school community and accountable, through “statutory, contractual and financial obligations”, to the local authority while the role is articulated in the GTCS Standard for Headship (GTCS, 2021b) as “the lead professional”, with “responsibility and capacity to enable and empower individuals and teams”; a leader who will “proactively contribute to leadership at system level”. The analysis of the construction of the headteacher role in both documents elicited three overarching themes in relation to prescribed leadership responsibilities and practices impacting Career-Long Professional Learning:

- (i) Cultivating culture (Fig. 9.2)
- (ii) Privileging context and community (Fig. 9.3)
- (iii) Leading professional learning (Table 9.1).

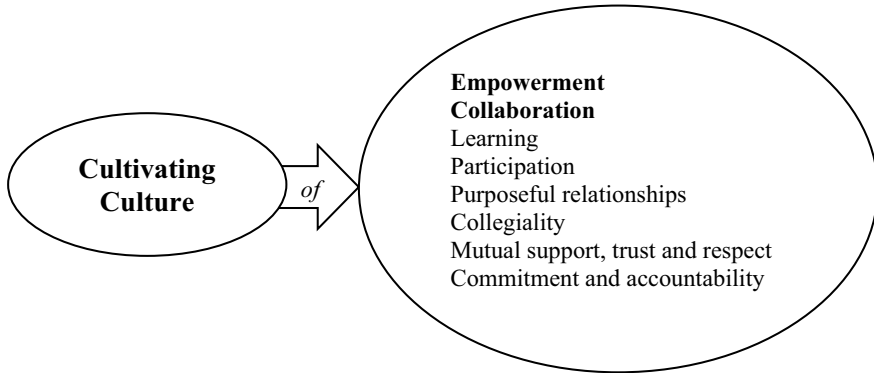


Fig. 9.2 Categorisation of codes under the broader theme: *cultivating culture*

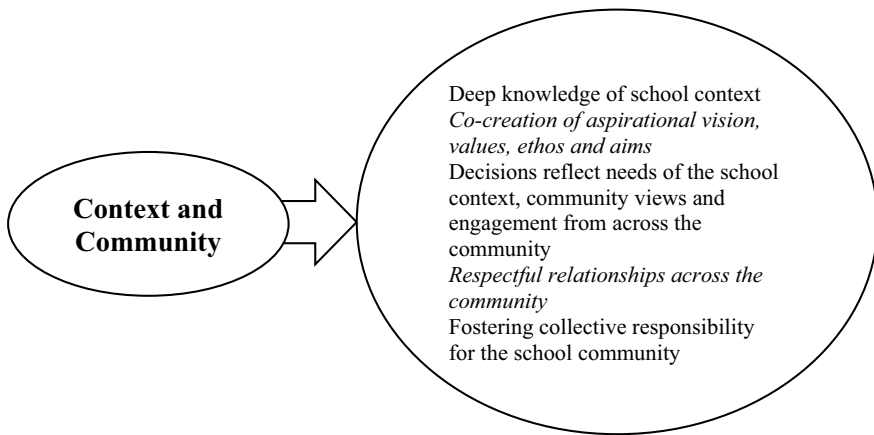


Fig. 9.3 Categorisation of codes under the broader theme: *privileging context and community*

The theoretical analysis (Braun & Clarke, 2006) also examined the prescribed leadership actions of the headteacher to empower and develop individuals and teams, alongside the teacher professional learning expectations within the Standard for Full Registration and the Standard for Career-Long Professional Learning (CLPL), (GTCS, 2021c, 2021d). It is evident from this analysis that there are high expectations of engagement in professional learning and demands of all teachers, but the specific responsibility for leading professional learning lies with headteachers, illustrated in Table 9.1.

The promotion of cultures of empowerment and collaboration within Scottish policy discourse is underpinned by Scottish Government commissioned national and international insights such as conclusions from the OECD review (OECD, 2015)

Table 9.1 Leading (and engaging in) professional learning (synthesised from GTCS, 2021c, 2021d; SG, 2019b)

Leading professional learning	
The role of the headteacher	
<ul style="list-style-type: none"> • Be the lead learner • Champion high quality professional learning for all staff • Build and sustain a professional school team/enable team professionalism • Communicate high expectations of CLPL • Establish principles and approaches that promote and offer a wide range of CLPL opportunities with equal access for all • Support and empower others to lead effectively and to improve • Support all teachers to be leaders of learning • Build capacity and capability through professional learning • Create time and space to engage in high quality professional learning using approaches that are relevant, authentic and ongoing • Facilitate engagement with networks and learning communities to develop professional practice together 	
Engaging in CLPL	Engaging in CLPL
The mandatory requirement for all teachers	The further aspiration in the standard for CLPL
<ul style="list-style-type: none"> • Commit to lifelong learning • Engage critically with literature, research and policy to challenge and inform professional practice and critically question and challenge educational assumptions, beliefs and values of self and system • Engage in reflective practice to develop and advance career-long professional learning and expertise • Enhance learning and teaching by taking account of feedback from others • Actively engage in professional learning to support school improvement • Work collaboratively to contribute to the professional learning and development of colleagues 	<ul style="list-style-type: none"> • Progress and enrich their professional knowledge and understanding, skills and abilities • Continue to develop as accomplished, reflective and enquiring professionals who can engage with the complexities of teaching and learning, the changing contemporary world of their learners, and the world beyond the profession and its institutions • Identify, plan and develop their own professional learning needs and ensure continuing CLPL • Focus on teacher leadership and leadership of and for learning • A strong and engaging expert, open to change and engagement with new and emerging ideas and approaches

and the International Council of Education Advisers (ICEA)¹ (Scottish Government, 2017b), that are specific about the need to establish cultures of professional collaboration to impact on student achievement. However, phenomena such as empowerment, collaboration and collegiality are complex. Implicit within policy is the assumption that they are understood and can be enacted by professionals whereas the “variables presented through professional identities, hierarchies, local context, reputation, performance measures, working conditions, positionality and agency”

¹ The ICEA was established in 2016 and draws upon the knowledge and experience of leading education and business experts to advise educators and the Scottish government on education leadership, school improvement and reform, to meet the aims of the NIF.

(Mitchell, 2019, p. 9) can adversely impact the aspiration, engagement and outcome of collaborative partnerships. Leading through COVID-19 has reinforced the imperative of social justice and equity set out in the professional standards (GTCS, 2021a) and this experience has strengthened headteachers' resolve to nurture care, connection, collaboration and mutual support, leading in their communities to determine the most appropriate approaches for their context (SG, 2018a, p. 1). However, despite the aspiration in the HT Charter, there prevails the empowerment/accountability paradox whereby actions and decisions must result in improved performance in narrow attainment measures, with increased responsibilities and mistrust of the profession around attainment and school improvement (Imrie, 2020), that can undermine the notion of leadership for equity and social justice (Forde et al., 2021a, 2021b).

9.5 Tensions and Opportunities in the Enactment of Policy Expectations: Analysis of Empirical Data

A key expectation in the role of the headteacher is the creation and sustaining of a collaborative leadership culture, within which middle leadership comprises a vital element. As part of the *FoH* project, the role of headteacher is explored through the lens of middle leaders' perceptions and experiences. In the fourth section of this chapter, we draw from empirical data gathered using the Delphi Method (Green, 2014) with school leaders. In particular, we examine policy expectations around headteachers "leading learning communities" (SG, 2018a, p. 1) to explore the implications for the understandings and practices of career-long teacher education.

9.5.1 The Complexity of Middle Leadership and the Changing Role of Headteachers

We begin by charting the evolution of the middle leader (ML) role, accorded increasing significance in Scottish schools, reflecting developments internationally. In this, we explore some of the inherent tensions in the role—with its dual focus on teaching and leading—through the international literature. Then, we turn to the findings from the *FoH* research strand on the role of ML to exemplify some of these tensions. Our intention here is to use the findings to help illuminate how the complexity of the role has (re)shaped the role of headteachers, changing from one of managing a school through a top-down management structure, to one where headteachers are expected to build leadership at all levels and foster career-long professional learning (CLPL) of teachers/leaders.

9.5.2 Middle Leadership: A Complex Role

The post of principal teacher (PT) represents a longstanding middle leadership role in the management structures of Scottish secondary schools (Girdwood, 1989), originally largely related to the management of a subject department or pastoral care and guidance, with little involvement in whole school development. With a review of *A Teaching Profession for the Twenty-First Century (The McCrone Report)* (Scottish Executive, 2001), greater attention was paid to this level of management with PT roles introduced in primary schools. Further recognition of the significance of this role came with the development of a professional standard, *The Standard for Middle Leadership and Management* (GTCS, 2012; revised 2021e) complementing the *Standard for Headship* (GTCS, 2021b). The development of this policy tool underlined the perceived contribution of middle leadership to whole school development, reflecting the policy focus on distributed forms of leadership across a school, with the ascribed need to build greater collaborative practice.

The role of middle leadership has evolved considerably in Scottish education, reflecting international developments. Middle leadership has become positioned as a central element in the development of school improvement strategies, with growing understanding of the various complexities of the role, inherent in the opportunities (Grootenboer, 2018) and challenges (Irvine & Brundrett, 2016) emanating from a dual (but not necessarily equal) emphasis on teaching and leading. Middle leaders face a range of challenges including balancing management and leadership demands (Láurisdóttir & O'Connor, 2017)—with management functions often dominating the practice realities of leaders—and balancing teaching and leadership (Bassett & Shaw, 2018), as well as building collaborative practice and holding teachers to account.

The multifaceted nature of the ML role creates challenges in trying to find a common and succinct definition of the role in the international literature. This lack of clarity is evident even in Scottish education with the *Standard for Middle Leadership* applying equally to either principal teachers (and so, in a formal management post) or teachers undertaking an informal leadership role. At an operational level, this lack of role clarity and definition creates tensions for middle leaders and headteachers (Javadi et al., 2017). The multifaceted nature of middle leadership potentially connects classroom practice with the strategic leadership of the school. However, fulfilling this potential necessitates the reframing of hierarchical relationships, with MLs occupying formal management posts, holding positions in school leadership structures, part of an extended whole school leadership team, negotiating multiple accountabilities faced within and beyond the school.

As a policy lever, the revised set of professional standards in Scotland (GTCS, 2021a) is designed to take forward national policy priorities around raising achievement for all learners and closing a poverty-related attainment gap. Against the backdrop of these policy expectations, various initiatives such as the *Scottish Attainment Challenge* and *Pupil Equity Funding*, have led an expansion in the areas of responsibility for middle leadership. In addition to subject/curriculum leadership and pastoral care leadership, MLs in both the primary and secondary sectors, take on

roles such as raising attainment, parental and community liaison, additional support needs and equity issues. In broad terms, through their leadership, MLs are expected to foster teacher agency, build collaborative relationships and practice with the teachers they led, hold these teachers to account and be held to account (Lipscombe et al., 2021). A critical issue in the positive impact of MLs on teacher development, classroom practice and pupil learning is the context of the school, including the role and expectations of the school principal, as well as the school's culture and leadership structures (Gurr & Drysdale, 2013). Therefore, much rests on the headteacher being able to create the conditions in which MLs can foster improvements in teaching and learning (Lipscombe et al., 2021). With this appreciation of the contribution of middle leadership to galvanise school improvement efforts comes the need for nuanced understandings of leading staff (a shift from management), and supporting career-long professional learning, alongside the specific professional development needs associated with the role.

The multifaceted nature of the ML role creates challenges for schools and headteachers in trying to structure this role (Forde & Kerrigan, forthcoming). We were interested to explore these issues within the Scottish context, through a focus on ML practitioners' constructions of tensions and opportunities in their enactment of policy expectations.

9.5.3 The Role of the Headteacher: Perspectives of Middle Leaders

To explore the way in which the role of the headteacher in Scottish education has evolved, we draw from the *FoH* study. In one research strand on middle leadership, we explored the contribution of middle leadership to social justice leadership (SJL). In the Scottish context, social justice underscores the aims and values of all schools and the expectations placed on all teachers/leaders (SG, 2016c). We use the lens of MLs reflecting on their contribution to SJL, to explore the implications for the role of the headteacher.

The Delphi Method (Green, 2014) was used to gather empirical data from thirty middle leaders across a secondary school. This method consists of a series of rounds in which MLs respond individually to a set of questions, their responses are then collated and analysed thematically (Clarke & Braun, 2018). From this analysis, summaries are prepared and then circulated to all participants. Participants can then offer further comment, material or corrections and/or confirm the summaries. The questions used in the *FoH* study covered the MLs' understandings of social justice, their role in SJL, factors that facilitate and hinder this role, formative experiences in their SJL development, school development priorities and professional learning priorities identified by MLs. We draw from this data to discuss two issues: factors that hinder or facilitate the exercise of middle leadership; the professional learning of MLs. The data underlined the critical role of the headteacher in shaping the context and conditions

in which middle leadership might make a positive contribution. This data illustrates the pivotal importance of headteachers in fostering a developmental culture where career-long professional learning is central to the practice of all leaders.

MLs detailed a range of facilitating factors which illuminate the increasing complexity of the role of the headteacher. The MLs reported that school culture, fostered by the headteacher, provided them with the context to exercise SJL. Several facets emerged from their descriptions: the approach and stance of the headteacher; the place of values in the work of the school; relationships and communication as critical dimensions of the headteacher. The emphasis was on the relational dimensions of the headteacher's leadership (Eacott, 2019), rather than structural issues.

The data highlights the way in which headteachers are now expected to set aside long-established management hierarchies and instead, work with and through leaders across the school including MLs. However, the way a headteacher exercises their leadership, highlights the complex nature of headship and the multiple expectations placed on headteachers. A crucial facilitating factor was the importance of the headteacher leading with and through a school leadership team: *"Having a good senior leadership team in school who understand the importance of social justice, inclusion and equality and can support the wider team to deliver this"*. Middle leaders appreciated: *"Allowing for distributed leadership – allowing staff to thrive in areas of strength"*. Further, MLs reported that through distributed leadership, appreciated as members of the leadership team, they were able to develop as leaders: *"Another help is being included in senior management discussions about plans for aspects of school life. This helps me to feel included, playing a role in shaping the future and respected for my opinion and contributions"*. Through the practice of distributed leadership, MLs looked to headteachers to build and support collaborative practice and foster shared values. Collective commitment to values, focused on the positive experiences of all pupils, were factors that greatly supported social justice leadership: *"Being part of a leadership team that refuses to stand still, but always wants to move forward and improve - and is willing to take risks and be creative to do so – provides exciting opportunities for social justice leaders"*. Working with the leadership team was one element of the wider role of the headteacher, in developing the culture of the school to realise these shared values in practice.

A recurring idea in the data is related to the context of the school and the relationships between staff, and between staff and pupils: *"positive work environment and a 'can do' attitude from staff enthuses our young people"*. Within the school, the headteacher's role was deemed pivotal in shaping the culture. However, expectations about the influence of the headteacher were wider than the school context. Several MLs noted the importance of working with parents, families and the wider community. This outreach work was also shaped by the culture of the school: *"Being part of a school where the leadership team as well as the staff (on the whole) are working together as a community for the good of the whole community"*. The headteacher's role in structuring the expanding middle leadership level to include a wide variety of roles, helped build connections across the school: *"What helps social justice leaders in the school is that there are a lot of us!"*.

The Delphi study also explored what the MLs saw as the formative experiences in the development of their SJJ. The MLs highlighted significant family and educational experiences that shaped their role as a teacher/leader and their commitment to social justice. In addition, MLs pointed to their experiences in the school context as formative: *“Staff are afforded opportunities to partake in awareness-raising sessions which highlight our school context within the bigger picture of local authority/national priorities to promote inclusion and equality”*.

Another element in the headteacher role evident in the middle leadership data, was that of creating and sustaining a developmental culture: *“Very supportive school leadership who are keen to facilitate opportunities for staff to develop their practice and to take on leadership roles”*. At the heart of this culture, is a headteacher acting as a role model of leadership oriented to social justice: *“I have been heavily inspired by my headteacher’s quiet, calm and supportive approach to difficult situations”*. The modelling of leadership complements development opportunities that headteachers are expected to provide: *“Opportunities to attend quality CLPL”*. Indeed, a lack of opportunity to engage in professional learning and reading was a hindering factor. The headteacher’s role included making provision for middle leadership development and support for collaborative leadership approaches which MLs also found important in their development: *“Being heavily involved in the embedding of [school] values [...] and this helped me gain a wider perspective on ethos, vision and values”*.

A radical shift is evident when this ML Delphi data is compared with the historical relationship between headteachers and PTs. This represents a significant move away from top-down line management, where PTs’ previous focus was to manage their departments. Currently, MLs play an important connecting role between classroom and faculty practice and the overall leadership of the school (Forde & Kerrigan, forthcoming). However, it is through the multidimensional role of headteachers that the role of MLs is realised.

9.6 Career-Long Teacher Education: Implications for the Role of the Headteacher

The ML Delphi data highlighted the pivotal role of the headteacher to build and support collaborative professional learning cultures that recognise context and community and are built on shared values and understandings of social justice. It exemplified how empowerment of teachers and teams, nurturing of social justice, agency and self-efficacy, and leadership of enriching professional learning are, still in the gift of the *empowered* headteacher, despite mandates to implement externally prescribed policy. Empowerment is not without challenges, however, and this chapter concludes by highlighting key implications for the role of the headteacher leading and facilitating career-long teacher education in their communities, within an empowered system (SG, 2019a).

9.6.1 Professional Learning: For What Purpose?

There are tensions between the constructions in policy of the headteacher role—to champion, support empower and enable every teacher to realise the mandatory and aspirational CLPL requirements outlined in the GTCS Standards (GTCS, 2021c, 2021d)—and the practice realities. Headteachers are reconciling the paradox of public accountability for their school’s performance within a neoliberal performativity agenda, alongside a social justice-led aspiration to lead schools with an ethic of care that will privilege human relationships, well-being and development over human capital (Forde et al., 2021a, 2021b). While attention to accountability can raise standards, it is an ambiguous concept that, when used as a key driver for professional learning, can compromise school leaders’ core ethical purpose in favour of actions to increase productivity with statistical performance data as the key measurement of the success of headteachers and schools. If CLPL is to support and empower all teachers to lead learning effectively and to improve (GTCS, 2021d), it should be meaningful and impactful on individual and collective professional practice (Harris & Jones, 2019) with clarity around desired outcomes for children and young people (Guskey, 2021). School leaders must also take account of the school’s vision, beliefs and values, as strategic unifiers to underpin decision-making (Davies, 2011) around principles, approaches and opportunities for professional learning.

9.6.2 Professional Learning: What Is Valued?

What is valued as best professional learning practice differs within different societies where politics and micro-political systems shape and form the culture and values of people on the ground. Policy borrowing is a problematic phenomenon if it is simply seen as a quick fix and takes no account of context and culture (Colman, 2021; Pashiardis & Johansson, 2021; Priestley, 2002; Sahlberg, 2007; Sellar & Lingard, 2013). It ignores the fact that the process of policy enactment involves a myriad of actors who interpret, translate and reproduce policies on a continuous basis as appropriate to their context. Many countries have tried to emulate Finland’s success, by adopting its educational practices. However, Sahlberg (2011) stresses that the success of the Finnish educational system has been the result of developing a culture of trust across sectors and creating a cohesive network which integrates education and other social policies. He emphasises the necessity of policy *learning*, rather than simply policy *borrowing* and argues that context, history and culture are of the utmost importance and cannot be borrowed. Sahlberg and Walker (2021) suggest that what is crucial to school improvement is the “ability to engage people more in what they do, encourage them to take risks in trying out new ways to do old things, and the creation of a real sense of ownership” (Sahlberg & Walker, 2021 p. 21).

This aligns with the aspiration in *An Empowered System* (SG, 2019d) and asks that school leaders “understand the school’s context and culture ... the ways in which staff think, act and respond, set within a particular community which has either been enabled or constrained over time” (King et al., 2021, p. 1990).

9.6.3 Professional Learning: Collaboration

In best practice, professional learning models are “collaborative and grounded, rather than individual or top down” (Netolicky, 2016, p. 271). Datnow and Park (2018) assert that impactful professional collaboration is not about implementation of education policy: “Rather, it is a long-term process of rethinking teachers’ professional work that requires sustained engagement on the part of leaders and teachers” (2018, p. 214). However, there are tensions to be navigated if we are to have sustained engagement in models of professional collaboration. The construct of collaboration is complex and context-dependent, determined by a myriad of personal, political, structural and situational factors, explored by Mitchell (2019). Time is a key factor with a lack of collaborative time available within the current working day in Scotland, due to the high level of class-contact time. In 2017, the average statutory contact time in lower secondary OECD schools with available data was 700 h per year. Of the 37 countries listed in descending order of teaching hours per year, Scotland was seventh highest with 850 teaching hours, and Finland had the fifth lowest statutory teaching time, with under 600 h (OECD, 2018). Many teachers still tend to perceive of both formal and informal professional learning as an individual responsibility and activity, as and when time is available, their perception being (Kennedy, 2011) that non-contact time is at their discretion for individual marking or preparation, rather than engagement in professional learning or collaborative activities. The Scottish Government has committed to facilitate teachers’ access to extended professional learning and collaborative planning opportunities within the school day, by reducing class-contact time for teachers by 90 min per week by August 2022, giving a further 60 h a year (SG, 2021c). Headteachers will have the challenge of structuring this precious time to facilitate collaborative professional learning models that are meaningful and fulfilling if we are to have sustained engagement of and lasting impact on the school community.

To actuate the Standard for Headship (GTCS, 2021b) aspiration that the professional values of social justice, trust and respect and integrity should underpin teachers’ relationships, thinking and professional practice in Scotland (2021b, p. 4), headteachers must mediate conflicting national policy agendas (including education reform in Scotland), the impact of and learning from the pandemic, and local systemic and cultural factors within their communities. The stance and approaches of the headteacher to fostering trusting relationships, and agentic, enquiring practice within the community, strengthens a culture where Career-long Teacher Education

is welcomed and valued as an individual and collective responsibility, in order to continually improve and develop educational provision to meet the changing needs of pupils and society.

9.7 Conclusion

The construction of the headteacher role continues to evolve internationally and in Scotland. Through this chapter, our intention has been firstly to contribute to the discussion around these shifting constructions and the implications for career-long teacher education; and secondly, to propose key challenges that need to be engaged with if systemic educational improvement within an empowered system is to be achieved and sustained. The interrogation of changing policy articulations in relation to the role of the headteacher internationally highlights the impact of neoliberalism and the prevalence of policy borrowing, offering alternative constructions for school leaders enacting policy in Scotland and beyond.

The empirical data drawn from our multi-strand research project—*The Future of Headship*—offers unique perspectives on the role of the headteacher through middle leaders' experiences and insights. The case study school in Scotland has embedded a collaborative professional learning culture, built on shared values and understandings of social justice, providing a rich context for developing understandings of practice realities. Explicit in the perspectives of middle leaders are key contextual solutions to the challenges and tensions of the constructions of headteachers as leaders of professional learning. We offer these insights, identified through the chapter's thematic analysis, in support of developing understandings in the field of educational leadership: *cultivating culture, context and community*.

Within the case study school, the headteacher's role in *cultivating a culture* of career-long professional learning was understood, practised and experienced by the middle leaders. This culture was at the heart of creating and sustaining teacher development within which teachers are valued, respected and supported as professionals. The headteacher proactively models professional learning (as the lead learner), consistently exercising leadership oriented to compelling values, social justice, care and curiosity. *Context and community* were also found to be key. The headteacher fostered clear understandings of the school context, along with care and respect for the wider community: its challenges, strengths and aspirations. Staff engaged in collaboration and professional learning with an understanding of their role and its contribution to the school's collective aspiration to impact specific, agreed outcomes designed to make a positive difference within the school's unique context and community.

The COVID-19 pandemic and its impact has challenged and extended constructions of school leadership and professional learning. It is more important than ever that headteachers, as social justice leaders, have the knowledge, conviction and confidence to challenge policy borrowed from other systems as reactions to perceived failings in international measures of schools' success. Policy underpinned by neoliberalism that privileges human capital over human relationships, care, well-being and

development is challenged by school leaders with the courage, always, to be and do what is right for their school community and context. The models and practice of leadership endorsed and emerging in Scotland are increasingly contextually informed: contextual intelligence perceived as central in the forming of strong, respectful and responsive relationships across the school community; the cultivation of a culture designed to nurture career-long teacher education that includes the development of leadership at all levels; a collective conviction that lifelong professional learning together with collaborative school improvement improves student learning.

In Scotland, the contextual nature of the evolution of headship has resulted in the term *headteacher* being retained for the most senior leadership position in the hierarchical school staffing structure, reflecting a construction of headship that places learning and teaching at its heart. This is distinct from other constructions in systems such as that of England (Woods et al., 2021) which reflect more of a business model, with roles including *executive heads* and *CEOs*. In Scotland, the headteacher is understood as playing a direct and pivotal role in various facets of the professional learning of staff, including development of their leadership capacities (GTCS, 2005, 2012, 2021a; Scottish Executive, 1998), as with the emphasis on middle leaders' voices and contributions, explored in this chapter. Indeed, contemporary constructions articulate the role of the headteacher as the lead learner within a senior leadership team, rather than a focus on management functions within a senior management team (GTCS, 2021a).

An emphasis within some education systems on a business model of school leadership can be counterintuitive to the construction of school leadership as a collaborative endeavour within a distributed perspective. Given the variance across transnational policy contexts, from the name of the role (headteacher, principal, administrator) to the duties, standards or expectations in practice, we suggest more research is needed into both international articulations of headship that privilege high administrative accountability, and the extent to which these articulations in practice are at the expense of relational, collaborative and community-oriented professional practice.

While the nature of headship may always be contested internationally, we suggest that new practices developed during the COVID-19 pandemic have the potential to shift conceptions and constructions of headship from an administrative and hierarchical role to a role that privileges developing the capabilities and capacities oriented to relational leadership, building community to support transformative education. In this conception, career-long professional learning is both a fundamental right and responsibility of all teachers at all levels, individually and collectively, focused on improved learning for all students. Collaborative constructions of school leadership have implications for career-long teacher education with headteachers ultimately pivotal in the enactment and enablement of such practice across their school communities.

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