MINISTRY OF EDUCATION
Te Tāhuhu o te Mātauranga

Professional Learning and Development Planning

A Resource Package for Principals and Boards of Trustees

Contents

Preface

The purpose of this resource package is to assist principals and boards of trustees to identify the professional learning that will enable the principal to be most effective as a school leader at each stage of the career structure. The context of principal's learning is the school's long-term strategic directions and student achievement goals. The board also has a role to support the principal to achieve their individual career aspirations.

The material provides a planning process for principals and boards to follow in developing a mutually agreeable professional learning and development plan. If used collaboratively, the package enables principals and boards (or their representatives) to enter into professional learning conversations well informed and well prepared to set a learning and development programme for the principal for the coming year. The planning process is interactive and includes iterative discussion between the principal and the board. This will ensure there are 'no surprises' and contributes to building a constructive working relationship.

The package is intended to complement other available resources to support principals and boards as they plan the professional learning and development component of the performance agreement. It is provided as one of the options available for assisting with the professional learning and development planning process. Principals and boards can use any parts of the resource they find useful, or replace them with other processes they find more suitable.

Background

In 2011, the Ministry of Education signed Collective Agreements for Secondary and Area School Principals with their representative unions: Secondary Principals Association of New Zealand, New Zealand Educational Institute and the Post-Primary Teachers' Association. The Agreements provide for a new career structure for principals intended to support growth of professional leadership and build capacity across the school sector. The new career structure explicitly encourages and recognises the professional growth, leadership and contribution of principals.

It was recognised that some guidance material would be useful to principals and boards in meeting the requirements under **s4.1.2 (b)** of the Collective Agreements to have a professional learning and development plan in place as part of the performance management process. S4.4 of the Agreements sets out the new career structure for principals and outlines the level of learning and development that should be expected at each level of experience.

The resource has been developed by the Ministry of Education in discussion with the PPTA (NZSPC), SPANZ, NZSTA, Ngā Kura Iwi o Aotearoa and a number of principals.

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Overview

You will find the following sections in this resource:

1. Professional learning and development conversations – creating joint value

2. The professional learning and development planning (PLDP) process

3. Preparing for the next professional learning and development cycle

4. Useful support resources for preparing a PLDP proposal

1   Professional learning and development conversations – creating joint value

Professional learning and development for principals is a process that provides benefits to principals, their schools and their boards. This resource focuses solely on the annual planning process whereby the principal and the board reflect on the progress made in the previous year, and look forward to what is required to make progress towards the board's longer-term strategic objectives.

Specifically, the planning process focuses on how principals might think about their own professional learning and development needs and set them out clearly in a compelling case designed to get the support of their board. It also provides some tools for boards to think about what they are seeking from their principals, and how they can support their principal to gain the skills, knowledge and/ or experience to achieve the required outcomes for the school and learners.

1.1   Lessons from national and international planning literature

A large amount of national and international literature is available on the subject of professional learning and development for principals. Most of this material covers issues relating to career development and the performance appraisal system. This resource, however, focuses solely on the process required to put together a learning and development plan as required under s4.1.2(b) of both the Secondary and Area School Principals' Collective Agreements.

There are common themes in the international professional development planning literature that provide useful tips as to how to go about developing a professional learning plan.

These include:

- ■ *Use evaluative techniques* to establish base-line inputs. Providing evidence gives a strong basis for a compelling case as to why any particular set of learning activities will support the principal's role as a school leader and manager; improve student outcomes; and progress the individual career of the principal.

  Evaluative techniques can include, but are not restricted to, such tools as:

  - – Self-evaluation or skills analysis techniques. For example, journaling, logs, blogs, personality and/or team psychometrics (e.g. **Leadership Practices Survey; Tātaiako** for school principals)
  - – Using evidential data to identify skill development needs. For example, school composition and performance statistics; area and/or regional demographics; 360 degree staff/student or stakeholder surveys; or cultural contextual information if it is available.

- ■ *Link professional learning needs to the school strategic plan.* That is, identify learning goals that are consistent with the board's stated objectives for the development of the school and for agreed student achievement outcomes.

- ■ *Link professional learning needs to student outcomes.* That is, focus on learning that supports the ability of the principal to deliver the priorities the school has for student performance. In the New Zealand context this includes a particular focus on Māori learners; Pasifika learners; learners from low socio-economic backgrounds; and learners with special education needs.

- ■ *Demonstrate relevance* and the subsequent benefits for the school, the students and the individual principal (i.e. show the broad based return on investment in the principal's professional learning to students, staff, parents and the school community).

- ■ *Keep it simple, small and focused* so that it is achievable in a single performance cycle even though it may be contributing to a longer term vision for the school. The annual professional learning programme should not impose an unreasonable burden on the school or on the individual.

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1   Adapted from Helen Timperley's Model of Inquiry in BES: Teacher Learning and Professional Development
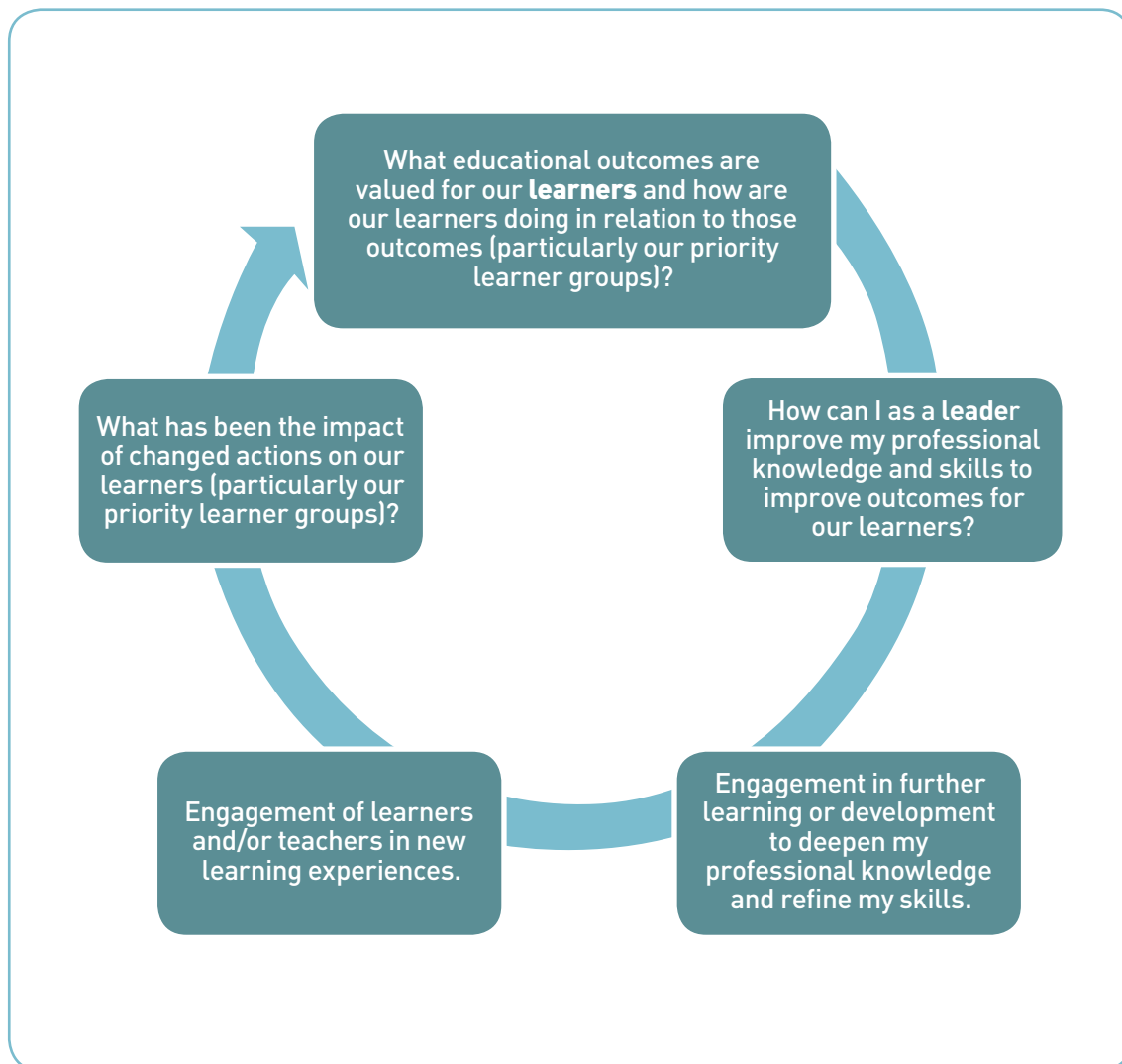
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1.2   Applying the planning lessons in the New Zealand context

The key lessons and themes in s1.1 will be used as the foundation for this resource package. The intention is to keep the planning process as simple as possible, but ensure that it is practical and achievable. By using this resource boards and principals can meet the requirement to have a professional development plan in place (Clause 4.1.2(b) in the Collective Agreements), and be assured that it is a plan that will assist each of them to achieve good outcomes for the school.

The following model of the professional learning and development cycle[1] depicts in broad terms the focus of professional learning. The research evidence is clear that strong leadership is a critical factor in achieving good learning outcomes for students. Professional learning is an integral part of school leadership.

Fig 1: Professional Learning and Development Cycle

What educational outcomes are valued for our **learners** and how are our learners doing in relation to those outcomes (particularly our priority learner groups)?

How can I as a **leader** improve my professional knowledge and skills to improve outcomes for our learners?

Engagement in further learning or development to deepen my professional knowledge and refine my skills.

Engagement of learners and/or teachers in new learning experiences.

What has been the impact of changed actions on our learners (particularly our priority learner groups)?

Principals need to know what learning will strengthen their role as a school leader and enable them to meet the board's strategic objectives and improve student achievement outcomes in their school. At the same time, they will have personal career aspirations they may wish to pursue.

Equally, the Board of Trustees needs to be clear about the professional development they would like to see their principal undertake and know how this will benefit the school. They also need to think about how they are willing to support their principal's personal career objectives, and have a clear view of the resources available or necessary to support the principal's ongoing learning.

Principals – going into a formal conversation with your board (or their representative) about your professional learning and development needs you will be well positioned if you can provide:

- A professional learning summary of any professional development undertaken in the previous year (if applicable) that provides information about the learning undertaken and the benefits of that learning to yourself as a school leader; the school and students; and the broader school community (including hapu and iwi if applicable), and

- A professional learning and development proposal for the coming year that includes learning goals, an outline of the learning opportunities you wish to take, and the support/resource requirements necessary to undertake them.

Boards – in discussing a professional learning and development proposal with your principal you may wish to explore:

- How the principal's priorities for professional learning in the next performance period will:

  - meet the relevant **professional standards for principals**
  - contribute to the career progression of the principal in accordance with the career stages set out in the relevant **Collective Agreement**
  - contribute to the achievement of the board's stated strategic directions and goals
  - meet the board's stated student achievement goals, and improve equity for Māori learners, Pasifika learners, learners from low socio-economic backgrounds and learners with special education needs, and
  - ensure the school is well led, well managed and well regarded by the school community (including hapu and iwi where applicable).

- How the principal's learning goals for this period will contribute to their personal career development aspirations, and

- What resources are required and will be made available to enable the principal to undertake the agreed learning programme.

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It is important that both the principal and the board are clear about each other's expectations in regard to the learning to be undertaken, and what the outcome of that learning will be. Part of the conversation should include a discussion on:

■ Appropriate review periods during the year and the process for dealing with these (e.g. you may be comfortable only to invoke these at the principal's request should they wish to discuss making adjustments to the agreed programme. Alternatively, you and/or your board may prefer more formal review points to assure yourselves that the programme remains on target and is appropriately resourced).

■ Your expectations with respect to reporting progress and evaluating the benefits of the principal's learning programme at the end of the performance cycle. Keep in mind that the PLD plan for the principal is only one part of the overall performance management cycle so reporting should not be onerous.

Further guidance on these conversations is contained in the relevant Collective Agreements for Principals.

2 The professional learning and development planning (PLDP) process

The principals' professional learning and development plan is only one part of the performance management process. It is, however, an important component. The reflective process and interactive conversation between the board and the principal to create a suitable plan contributes to the clarification of expectations, and agreement about how the principal can best meet the strategic objectives of the board and specifies the practical support required to do so.

The planning process set out in this section is one option for principals and boards to use when developing a suitable plan.
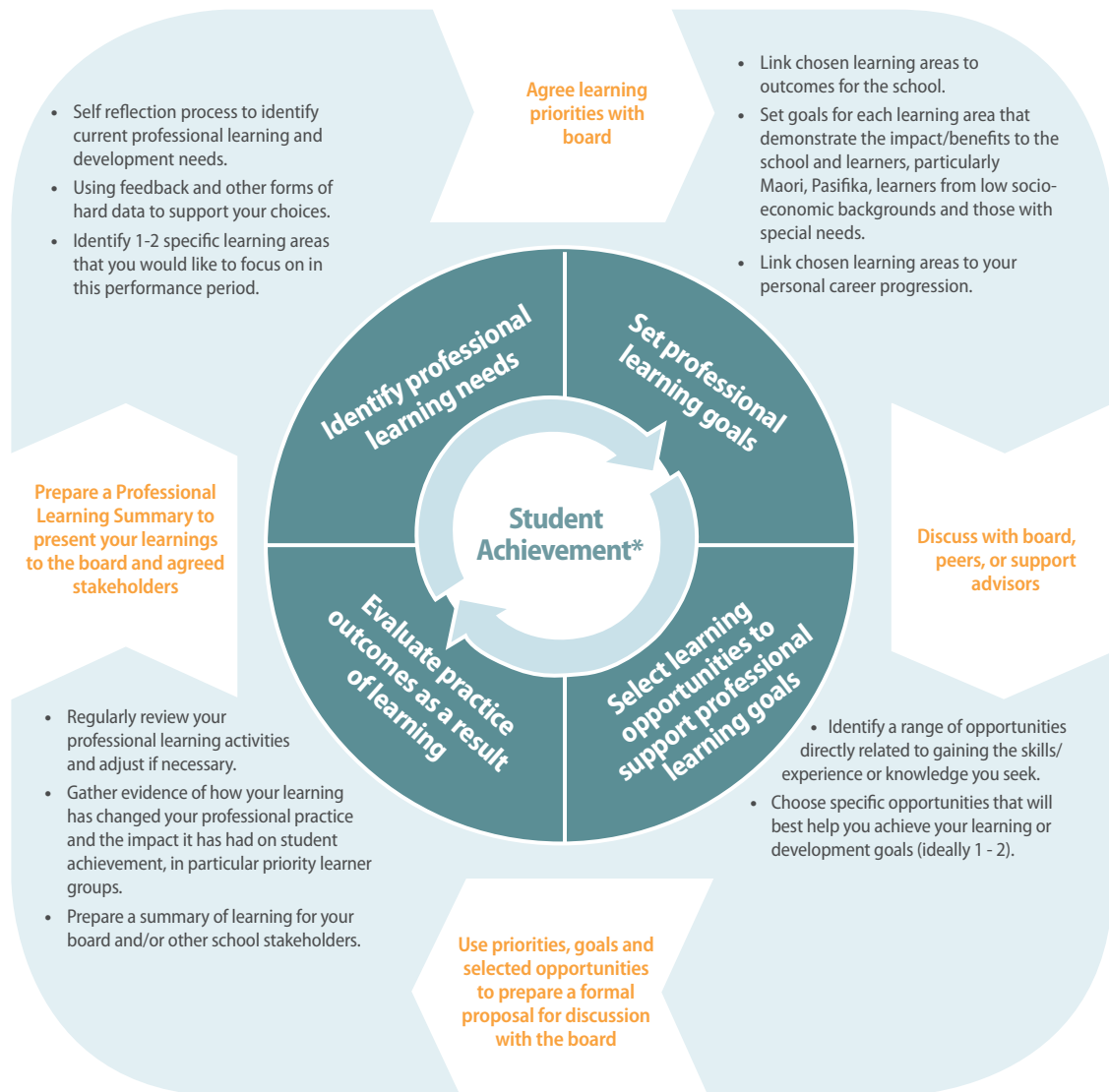
2.1 The planning process

The following professional learning and development planning model uses the cycle in Fig 1 and presents a way of identifying annual learning priorities and developing a proposal to achieve them. It incorporates the elements of good planning for professional learning identified in the international literature [s1.1], and adapted to the New Zealand context.

Principals may wish to use some, or all, of this process to assist them in planning a proposal for their own professional learning and development. Principals may wish to take advice from a peer or other trusted support person or member/s of their professional network as they work through the planning process.

Fig 2: The process for developing a professional learning and development plan

- Self reflection process to identify current professional learning and development needs.
- Using feedback and other forms of hard data to support your choices.
- Identify 1-2 specific learning areas that you would like to focus on in this performance period.

Agree learning priorities with board

- Link chosen learning areas to outcomes for the school.
- Set goals for each learning area that demonstrate the impact/benefits to the school and learners, particularly Maori, Pasifika, learners from low socio-economic backgrounds and those with special needs.
- Link chosen learning areas to your personal career progression.

Prepare a Professional Learning Summary to present your learnings to the board and agreed stakeholders

Identify professional learning needs

Set professional learning goals

Student Achievement*

Evaluate practice outcomes as a result of learning

Select learning opportunities to support professional learning goals

Discuss with board, peers, or support advisors

- Regularly review your professional learning activities and adjust if necessary.
- Gather evidence of how your learning has changed your professional practice and the impact it has had on student achievement, in particular priority learner groups.
- Prepare a summary of learning for your board and/or other school stakeholders.

Use priorities, goals and selected opportunities to prepare a formal proposal for discussion with the board

- Identify a range of opportunities directly related to gaining the skills/ experience or knowledge you seek.
- Choose specific opportunities that will best help you achieve your learning or development goals (ideally 1 - 2).

*Student Achievement pertains to all students, but there is a particular focus on lifting the outcomes for priority learning groups including Māori learners, Pasifika learners, learners from low socio-economic backgrounds, and learners with special needs.

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2.2   Identifying professional learning and development needs

This part of the resource is designed for principals, as they think through and prepare a proposal on their own professional learning and development that they will discuss with the board.
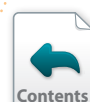
Self reflection

The first step in any professional learning and development planning process is *self-reflection*. This provides the opportunity to think through your own personal and professional priorities, and to examine your achievements, and future learning needs.

To identify the areas of learning you would like to focus on for the coming year, the professional learning template below offers a structured approach to identifying your immediate priorities. Supporting notes for filling in the template are included at the end of this section.

The template provides for up to three areas of professional learning, but there is no compulsion to have this many. 1-2 areas may be all that is necessary depending on your situation.

Download this document as a Word file from this page: **http://www.educationalleaders.govt.nz/Leadership-development/Professional-information/Professional-learning-and-development-planning/PLDP-planning-process/2.2-Identifying-professional-learning-and-development-needs**

Identifying professional learning needs for the coming year
Current strengths

1	What are the 1–2 (3) professional learning needs or interests on the top of my mind?
	1._____
	_____
	2._____
	_____
	3._____
	_____
	None come to mind.

2	What are my key strengths in school leadership?
	1._____ Supporting evidence:
	2._____ Supporting evidence:
	3._____ Supporting evidence:
	Others:_____ Supporting evidence:

3   Which of the (Secondary/ Area School Principal) professional standards am I strongest in?

Culture

*Strength:*_____

_____

*Supporting evidence:*_____

_____

Pedagogy

*Strength:*_____

_____

*Supporting evidence:*_____

_____

Systems

*Strength:*_____

_____

*Supporting evidence:*_____

_____

Partnerships and Networks

*Strength:*_____

_____

*Supporting evidence:*_____

_____

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Development Areas

4   Which of the (Secondary/ Area School Principal) professional standards do I need to work on to be the best I can be as a school leader?

Culture

*Area for development:*_____

_____

_____

Pedagogy

*Area for development:*_____

_____

*Evidence of need:*_____

_____

Systems

*Area for development:*_____

_____

*Evidence of need:*_____

_____

Partnerships and Networks

*Area for development:*_____

_____

*Evidence of need:*_____

_____

5 Are there any areas of school management that I can improve, and what skills or knowledge
do I need to help me do that?

Finance

_____

_____

_____

HR

_____

_____

_____

Performance management

_____

_____

_____

Property

_____

_____

_____

Planning

_____

_____

_____

Reporting

_____

_____

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6   Are there any areas of **relational trust** that I can build up? What skills or knowledge
do I need to help me do that?

Students

*Area for development:*_____

_____

*Evidence of need:*_____

_____

Staff

*Area for development:*_____

_____

*Evidence of need:*_____

_____

Board

*Area for development:*_____

_____

*Evidence of need:*_____

_____

Parents

*Area for development:*_____

_____

*Evidence of need:*_____

_____

Wider school community (including hapu and/or iwi if applicable)

*Area for development:*_____

_____

*Evidence of need:*_____

_____

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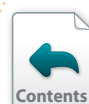
7   What are the specific goals that the school board has set for our school this year?

Are there any areas that I can improve in that would help the board achieve those goals for the school, that I haven't covered off above?

_____

_____

_____

_____

Review

8   Given the answers in 2 – 8 above, will the learning areas I listed at the beginning of this exercise (1) provide me with the learning I need to improve as a pedagogical leader, school manager and school community leader? What do I need to add/withdraw?

_____

_____

_____

_____

Priorities

9   Final list of priorities for professional learning in the coming performance year:

1. _____

_____

2 _____

_____

3. _____

_____

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Notes for the completion of the template to identify, and prioritise, professional learning needs

2.2.1.   Self-reflection notes

If you regularly (or even irregularly) record personal reflections about your work practice (e.g. a log, a diary, e-portfolio, network discussions or private practice notes) these can assist to identify the areas of professional development you might like to focus on in the coming year.

Notes on how you currently perform using the professional standards relevant to your current role (Secondary or Area School Principals) will be particularly valuable in helping you identify areas of possible development.

Working example

One of the areas that stand out in your writing over the past three to six months is a repeated reflection on the frustration you experience in dealing with staffing performance issues. You might like to explore whether there are any courses, workshops or coaching available that might give you ideas, tools or skills to handle these instances more effectively.

2.2.2.   Self-evaluation data

Building in empirical evidence to support your judgements is essential to developing a robust professional learning and development plan that will gain the support of your board. If you have available any evidential data on your current professional skills and knowledge and/or personal attributes and how these contribute to your professional role, these can also be used to identify your professional learning needs.

Examples of such tools might include (but are not restricted to) personality assessments such as Myers Briggs/ The Big Five Personality Traits/ Keirsey Temperament Sorter or team psychometrics (e.g. Leadership Practices Survey) or 360 degree surveys. You might also like to review your cultural competency using Tātaiako.

Working example

You have recently finalised a set of change management priorities related to building better relationships with Māori learners and the whānau that you are very keen to pursue. The data at your school shows that your Māori students are not achieving as well as other learners and your school has not engaged very well with the whānau of your learners.

You have been communicating your priorities to the staff through a number of processes including briefing them at staff meetings, distributing the Tātaiako materials and talking about your priorities at community meetings.

It is important that the staff buy-in to the process and assist you to drive a change process designed to lift learner achievement. It is also important that they are with you as you seek to find ways to build productive connections with whānau.

A recent 360 degree staff survey highlights that the staff do not understand the key messages you are trying to convey and further, they don't believe that what you want to do will make any real difference to learner's outcomes.

It is clear from the survey that you need to find more effective ways to communicate with staff in ways that will engage them in reflecting on their beliefs and assumptions. How will you go about this? Who might be able to work with you?

2.2.3. Documented performance evidence from peer review and other stakeholders

One of tools available to all professionals on their current performance is reflections from people who see you carrying out the role on a regular basis and/or are affected by your performance in the role. This could be staff members, students, parents, hapu or iwi members, members of the school community or school supporters and suppliers.

Seek out and document evidence of your performance from your stakeholder groups. Use the feedback they give you to assist you to drill down to specific areas for further learning and development.

> ### Working example
>
> You want to learn more about financial management. There is nothing wrong with the state of the school's finances, but you are not totally comfortable that the balance sheet always makes complete sense to you. At the end of each month it is a stressful process for you and your senior staff members to gather all of the relevant data and ensure that everything is accounted for. It feels uncertain, but you are not sure what specifically might help.
>
> Your board suggests that s/he would find it useful to change some of the financial reporting practices at the school so that the monthly balance sheet reconciliation is less of a mission for everyone.
>
> Focusing your learning on financial reporting and recording might, therefore, assist you to fully understand and work with the board and your senior management team to put changes in place that help all of you. For example, many universities and polytechnics in NZ offer short courses in *'Finance for Non-financial Managers'* that may be helpful.

Agreeing your priorities for further learning with the board

Before you use the priorities you have identified as the basis for your professional learning and development proposal it is a good idea to check them out with your board, or board representative. This opens the conversation and ensures there are no surprises on either side as the planning process takes place.

If the board has additional, or alternative priorities, they would like you to focus on the template can be used as the basis of a conversation to finalise and agree your priorities before proceeding further with your planning.

2.3 Setting professional learning goals

Once you have identified your top learning priorities and agreed these with your board, the next step is to establish specific goals in relation to each of those priorities for the coming year. Your goals need to be specific and achievable. It will be helpful to both you and your board if you can link each goal to identifiable professional practice benefits, or support for your personal career progression.

2.3.1. Linking learning priorities to the school's strategic outcomes

You will have worked with your school board to identify the vision and strategic goals for your school. Remind yourself of these. Think about how your professional learning will contribute to advancing the objectives you and your school board have for the school.

Look at the statistics that relate to the composition of your school and its performance against key variables. Can you see how the learning needs you identified in s2.2 relate to helping you achieve the strategic outcomes set out in the school's strategic plan?

Write brief notes against each of your priority learning areas setting out how you think they will contribute to the outcomes contained in your school's strategic plan.

2.3.2. Linking learning priorities with student outcomes

What objectives have been set for student outcomes in your school? Research has shown that there is a direct link between student achievement and the quality of teaching and school leadership. The stronger you are as a school leader, the more likely it is that you will create a strong leadership team within your school and that your student's will do well.

Write brief notes against each of your priority learning areas setting out how you think they will contribute to the student achievement outcomes you, and your board, want to achieve. Take special account of how your learning priorities will contribute to achieving improvements for priority learner groups: Māori, Pasifika, learners from low socio-economic backgrounds and those with special needs.

2.3.3. Linking learning priorities to your personal career ambitions

Your career progression is an important part of the professional development considerations. In identifying your priorities for learning for the coming year you have considered your professional strengths and weaknesses and how these areas of learning will support you to improve your professional practice.

It is equally important to think about how these areas of learning will contribute to your career progression. It may be that at your current stage of your career the learning areas that improve your professional practice may be all that you need. On the other hand, there may be specific career ambitions you hold that will position you to be suitably qualified to take on other leadership opportunities in the future.

Is there some area of learning you wish to add to the list above? Can you link the areas of learning you have identified in s2.2 to specific career goals you hold? If so, add notes about how the learning priorities relate to your personal career progression so that you can discuss this with your board.

Working example

You are the principal of a middle sized, urban school; a role that you have been in for the past six years. You now feel comfortable in this position, but you feel that moving onto a role in a school with a completely different profile (perhaps an immersion kura, area school or rural school) would be a significant challenge in the future.

You are currently working towards a Masters of Education degree as you think this will assist your suitability for such a role. The learning needs you have identified in Step 1 above are useful in developing your current professional practice, but you would also like your board to support you in your ongoing commitment to your Masters degree.

2.3.4. Goal setting

Use the priority learning areas you have identified in s2.2 and the notes you have made in relation to each to develop a set of learning goals.

Download this document as a Word file from this page: **http://www.educationalleaders.govt.nz/ Leadership-development/Professional-information/Professional-learning-and-development-planning/ PLDP-planning-process/2.3-Setting-professional-learning-goals**

Setting learning and development goals (specific and achievable)	
Learning priority	**Learning and development goal**
1. As set out in s2.2 (#9) above.	■ **Specific outcome** I am seeking from undertaking this learning (e.g. Gain a greater knowledge of the cultural background of my Pasifika students). ■ **Link to learning need** I am addressing (e.g. Gain a greater knowledge of the cultural background of my Pasifika students to enable me to understand the factors that play a role in their learning needs). ■ **Link to professional practice benefit** that will be achieved (e.g. Gain a greater knowledge of the cultural background of my Pasifika students to enable me to understand the factors that play a role in their learning needs and introduce teaching practice changes that will positively affect their literacy and numeracy achievement outcomes). ■ **Link to personal career progression** (if applicable)
2. Details as for learning priority 1 above	Details as for learning priority 1 above
3. Details as for learning priority 1 above	Details as for learning priority 1 above

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2.4   Selecting learning and development opportunities

For each of the priority areas of learning you have identified for the coming year, there are a range of opportunities available that will enable you to meet your learning goals. Formal courses through universities, wanangas and/or polytechnics are one means of achieving the required learning outcome, and there are often short courses available that might assist.

However, there are also a range of other opportunities that you and your board may wish to consider as valid learning options. These can include such things as:

■ Attending relevant leadership conferences or forums (hui or fono)

■ Preparing and delivering papers at relevant conferences, forums, hui and/or fono

■ Preparing and delivering papers to subject matter meetings or attending such meetings as a learner

■ Participating in working groups where your work experience as a principal is valued and you have the opportunity to learn from others

■ Publishing in national and/or international educational (or other subject matter) journals

■ Sharing 'lessons learned' with other educational leaders through blogs or other interactive media resources

■ Participating actively in professional networks and communities of interest either online, or in person

■ Contributing to other educational leadership or appropriate community leadership bodies

■ Undertaking short secondments to other schools or agencies (e.g. Ministry of Education; Teachers Council; Education Review Office) to gain subject matter knowledge or particular skills or areas of experience you are seeking

■ Develop opportunities offered from **study awards and/or sabbatical provisions.**

You should discuss any forums or opportunities that you see as relevant with your board, or their representative (if applicable). You may also wish to discuss opportunities with peers or other advisors in preparing this plan.

You and your board (or their representative) should use **s4.4 of the Collective Agreements** to cross-reference and check that the learning opportunities are applicable to your level of experience and the types of learning and development expected to be undertaken at that level.

2.5   Creating a professional learning and development proposal

Putting together a professional learning and development proposal to support your professional learning needs for the coming year is the final step in preparing this component of your performance management discussion with your board chair (or their representative). The proposal should pull together the results of your planning process into a succinct package for further discussion and agreement with the board or board representative.

Download this document as a Word file from this page: **http://www.educationalleaders.govt.nz/Leadership-development/Professional-information/Professional-learning-and-development-planning/PLDP-planning-process/2.5-Creating-a-professional-learning-and-development-proposal**

Professional Learning and Development Proposal
PLDP for performance period: [Date] to [Date]
Learning priority 1:   *Specify from s2.2 above.*   Learning goal: *From s2.3.4 above*
Learning opportunity [s2.4]   *Detail the specific course, forum, conference, workshop/hui/fono, academic study, coaching, network or other means of learning (e.g. online learning community or participation in a study group) that will enable you to meet the goal set out above.*
Professional practice benefits   *Use the learning needs you have identified in s2.2 to set out how your professional practice will be improved.*
Link to school's strategic goals and objectives for student achievement   *From s2.3.1 and s2.3.2 above.*   1.   2.   Others …
Link to personal career progression   *From s2.3.3 above.*
Resource requirements   *Detail the time commitment you need to make (inside and outside regular work time); any resourcing replacement requirements this will create; any direct (fees) and indirect costs (travel, accommodation, materials). Identify any budget allowances available (e.g. grants, scholarships, study awards) to meet these costs. You could include a note of support from the board treasurer to confirm that the required funding is available.*
Timeframe for completion   *Specify the details of the learning opportunity (e.g. study duration; relevant dates etc.).*

Report back arrangements

Specify when the board can expect to receive formal feedback on your learning.

Identify who else you could report back to (e.g. iwi, runanga, school community or learning community) and when/how you will do this.

Specify the types of evidence you plan to use to support your learning outcomes.

Learning priority 2:

Details as for priority 1.

Learning priority 3:

Details as for priority 1.

The learning and development proposal should be discussed and formally agreed with the board. Once it is agreed it should be used throughout the year as a dynamic reference document that provides you and the board with a base working document for reference and reflection. It should be adjusted to accommodate changes if required.

Evidence of progress towards each priority learning goal should be collected as the learning opportunities are taken, and any consequential changes to your working practice, or initiatives within the school are made.

3 Preparing for the next professional learning and development cycle

3.1 Periodic review and goal adjustment

During the course of the working year, the learning priorities agreed between the board and the principal may change as a result of circumstances that arise that could not be anticipated at the beginning of the exercise. It is useful for the principal and the board (or board representative) to periodically check on progress and discuss whether the priorities and goals they jointly set remain valid, and whether they are satisfied with the progress being made on the learning programme.

A quick review of the stated goals and the learning plan every 3-4 months will ensure that the learning programme stays on track, or is readjusted if necessary. For a range of reasons it may be that the principal has been unable to progress their learning intentions, or that some other area of learning is now more compelling and it is agreed that an adjustment to the original plan is necessary. Regular review ensures that all parties are aware of changing priorities and expectations can be managed appropriately.

3.2 Collecting supporting evidence

As the learning programme progresses it is essential to gather evidence about the impact your learning is having on your leadership practice. This can include (but is not restricted to) such evidence as:

- Data/statistics on school performance relating to identified strategic outcomes for the school
- Data/statistics on student achievement outcomes for the school
- Formal board feedback on improvements or initiatives in the school instigated as a direct result of the learning undertaken
- Staff, student and/or school community stakeholders (including hapu and iwi where relevant) surveys on your performance
- Written student/staff feedback on initiatives instigated, or areas of practice that have improved
- Any other feedback received from school stakeholders during the course of the year that relates to the new areas of learning (what has worked, and what hasn't).
- Course results on completion (if applicable)
- Certification of course completion (if applicable)
- Written feedback from course leaders on participation and/or performance in a course of learning undertaken
- Papers presented at conference/s
- Papers you have published on research and/or practice
- Review of any conferences attended including key learnings
- Emails from colleagues, board members, iwi representatives or members of the school community commenting on any changes or alterations to processes instigated as a result of the current learning
- Summary of workshops attended including key learnings
- Workshop materials/ papers
- Relevant website materials
- Log/ journal/ practice notes about changes instigated as a result of current learning and how this has impacted on pedagogical, management practice or relational trust in the school and/or school community.
- Informal student/staff feedback

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3.3   Presenting learning achievements to the board and any agreed stakeholders

Having at the outset a well-presented proposal for professional development gives the principal the basis for easily providing the board with feedback on the learning undertaken during the year. Reporting can include key learnings and demonstrating how these have changed professional practice, improved learner outcomes, and are now benefiting the school. This format may also be useful in the future when discussing changes in your school with stakeholder groups (e.g. iwi or parents).

Reporting does not need to be an onerous task. The periodic reviews and supporting evidence collected throughout the learning process should provide all of the elements needed to easily provide the board, board representative, iwi, or school community with a summary of what has been achieved.

A simple, but comprehensive presentation could include for example:

Download this document as a Word file from this page: **http://www.educationalleaders.govt.nz/Leadership-development/Professional-information/Professional-learning-and-development-planning/Preparing-for-the-next-professional-learning-and-development-cycle/3.3-Presenting-learning-achievements-to-the-board-and-any-agreed-stakeholders**

Personal Learning Summary

Learning goals in the period [Date] to [Date] (including any adjustments made throughout the year, if applicable):

1._____

2_____

3._____

Learning opportunities undertaken (where and when):

_____

_____

_____

Key achievements:

1._____

2_____

3._____

Others:

Practice changes and impact on learner outcomes as a result of this learning (if applicable)

_____

_____

_____

Feedback notes (from colleagues/ peers/ staff/ students/other stakeholders)

_____

_____

_____

Personal reflections (These could include, but are not restricted to):

Learning experience:_____

_____

Learning outcomes/benefits (personal and professional):_____

_____

Lessons learned:_____

_____

Implications for next cycle of learning:_____

_____

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4   Useful support resources for preparing a PLDP proposal

Materials on educational leadership may be useful to peruse when you are thinking through your options for professional development. The Ministry of Education's library currently provides a service whereby teachers can access copies of all the referenced research in the Best Evidence Synthesis (BES): **http://www.educationcounts.govt.nz/topics/ministry-of-education-library**

Listed below are some further references to leadership practice which the Ministry of Education's library holds and that are available online. The Ministry of Education Library has agreed to provide services to interested principals who wish to access any of these materials via the Library's secure online network.

If you are interested in accessing any of the resources below please contact the Library directly on Education.library@minedu.govt.nz and ask for library service. You will need to explain who you are, and which articles/references you wish to access. The library will require your email and postal address, and your phone contact details.

Useful leadership practice resources and readings

Best Evidence Synthesis (BES) (all of the references contained in this resource are available from the Education Library)

Eddy D., Cardno, C., & Chai, C. (2008). **Professional Supervision for New Zealand Principals:** Analysis of Current Issues and Options. Auckland Uniservices. University of Auckland.

Gilbert, Jane (2005) Catching the Knowledge Wave? The Knowledge Society and the Future of Education, NZCER Press.

Hattie, John (2012) Visible Learning for Teachers: Maximising Impact on Learning, Routledge.

Kiwi Leadership for Principals ((2008) – presents a model of educational leadership designed for New Zealand's schooling context

Ministry of Education (2009) *Ka Hikitia – Managing for Success* – the Ministry of Education's approach to improving the performance of the education system for and with Maori.

Ministry of Education (2011) *Measurable Gains Framework – Evaluative Logic.*

Ministry of Education **Leadership programmes**

Pasifika Education Plan 2009 – 2012: - making the education system work for Pasifika so they gain the knowledge and skills to do well.

Professional Learning and Development IAE summary

Robinson, Viviane (2011) Student-Centred Leadership, Jossey-Bass.

Ruia: **School-whānau partnerships for Māori learners' success**

Sinnema, Claire (2005) *Teacher Appraisal: Missed Opportunities for Learning*, Unpublished thesis (EdD), University of Auckland.

Tātaiako: **Cultural competencies for teachers of Māori learners** (2011).

Timperley, Helen (2011) *Using student assessment for professional learning*, Paper #21, Office for Policy, Research and Innovation, Department of Education and Early Childhood Development, Melbourne.

Tū Rangatira: Māori Medium Educational Leadership (2010)
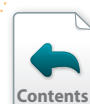
Items held in the Ministry of Education Library

Please note: The Ministry of Education is not endorsing any of the material below by its inclusion in this resource. These materials are available through the library, but it is up to the readers to discern whether the information provided by individual authors is useful to their own leadership practice. The references provided can be accessed as per the directions above:

Current catalogue of Ministry resources (June 2012)

Barker, Bernard (2007), **The leadership paradox: can school leaders transform student outcomes** in School Effectiveness and School Improvement, 18 (1), pp21-43.
CatID: 62968
Abstract: Investigates whether transformational leaders significantly impact on student outcomes by looking at The Shire School - a rural school in England for 11 to 18 year olds.

Day, Christopher et al. (2011), **Successful school leadership: linking with learning and achievement**, Maidenhead, Berks, UK., Open University Press.
Call Number: 371.2011 SUC 77060 (Book)
CatID: 77060
Abstract: Examines the nature of successful school leadership. Discusses what it looks like in practice and how it affects primary and secondary schools and student outcomes.

Education Review Office (2010), **Preparing to give effect to the New Zealand curriculum**, Wellington.
Call Number: 375 PRE (Book)
CatID: 73339
Abstract: Presents the Education Review Office's evaluation of schools' preparations for implementing the New Zealand curriculum.

Feist, Catherine (2008), **Positions and dispositions: locating leaders within New Zealand secondary school faculties**, in *Journal of Educational Leadership, Policy and Practice,* 23 (2), pp60-73.
CatID: 69028
Abstract: Explores six secondary school faculty heads' perceptions of their work and curriculum leadership.

Leithwood, Kenneth, Harris, Alma & Hopkins, David (2008), **Seven strong claims about successful school leadership**, in *School Leadership and Management,* 28 (1), pp27-42.
CatID: 65828
Abstract: Provides an overview of the literature and summarises the main findings from empirical studies concerning successful school leadership. Debates claims concerning basic leadership practices, patterns of distribution, personal traits in leadership effectiveness and staff commitment.

Leithwood, Kenneth & Strauss, Tiiu (2009), **Turnaround schools: leadership lessons** in *Education Canada,* 49 (2): pp26-29.
CatID: 70313
Abstract: Presents key findings from a Canadian study into successful turnaround leadership in low or underperforming schools. Identifies three turnaround stages: declining performance, crisis stabilisation, and sustaining and improving performance.

Notman, Ross & Henry, Annie (2010), **The human face of principalship: a synthesis of case study findings** in *Journal of Educational Leadership, Policy and Practice,* 24 (1), pp37-52.
CatID: 74690
Abstract: Analyses the personal qualities, knowledge, and skills of successful New Zealand school principals.

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Notman, Ross (2010), **Joining leadership and classroom pedagogies: a review of the best evidence synthesis iteration (BES)** in *Journal of Educational Leadership, Policy and Practice,* 25 (1), pp11-21.
CatID: 73566
Abstract: Examines the strengths of the best evidence synthesis research evidence as it applies to practitioners and educational researchers. Explores issues arising from the BES including the implementation of pedagogical leadership roles for primary and secondary principals, and the range of leadership types that contribute to successful school leadership practices.

Notman, Ross & Henry, D. Annie (2011), **Building and sustaining successful school leadership in New Zealand**, in *Leadership and Policy in Schools*, 10 (4), pp375-394.
CatID: 77801
Abstract: Identifies factors that contribute to the development and maintenance of successful school leadership using case studies of six New Zealand primary and secondary school principals.

Parsons, T.W (2010), **Secondary principalship: an endangered species?** in *SPANZ Journal*, pp28-31.
CatID: 75631
Abstract: Highlights the importance of professional leadership development for, and long term retention of, secondary school principals within the New Zealand education system.

Santamaria, Lorri J & Santamaria, Andres P. (2012), **Applied critical leadership in education: choosing change,** New York: Routledge.
Call Number: 371.2 APP 77909 (Book).
CatID: 77909
Abstract: Presents a strengths-based leadership model arising from critical race theory and critical pedagogy that aims to help diverse educational leaders transform practices and systems and address academic, cultural, and socioeconomic gaps.

Slowley, Denis (2009), **A contingent view of secondary school leadership in New Zealand** in *Journal of Educational Leadership, Policy and Practice*, 24 (2), pp31-40.
CatID: 72086
Abstract: Analyses the qualities of leadership in a secondary school context, arguing that the skills required and variables involved make it difficult to assess principal competence using traditional business models of leadership.

Thambi, Melinda & O'Toole, Paddy (2012), **Applying a knowledge management taxonomy to secondary schools** in *School Leadership and Management*, 32 (1), pp91-102.
CatID: 78407
Abstract: Examines the relevance of Earl's taxonomy of knowledge management (KM) to secondary schooling. Encourages principals to examine their own knowledge practices and implement a KM strategy within their schools.

Wylie, Cathy (2010), **Focusing leadership on adult learning: the secondary school challenge** in *Journal of Educational Leadership, Policy and Practice,* 25 (1), pp51-66.
CatID: 73570
Abstract: Explores one theme from the best evidence synthesis iteration (Robinson, Hohepa, Lloyd, 2009): the value of communal professional cultures in schools.

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Database: Australian Education Index, ERIC, Education Research Complete

Bonnici, Charles A (2011), **Creating a Leadership Style** in *Principal Leadership*, v11(5)
Jan, pp54-57.
Abstract: This article presents 14 principles of school leadership that will help school leaders set a positive tone for
their schools and lay the necessary groundwork for improved teaching and learning.

Eacott, Scott (2011), **Leadership strategies: re-conceptualising strategy for educational leadership**
in *School Leadership & Management*, Vol. 31, Issue 1, Feb, pp35-46.
Abstract: This article draws on a variety of data from a larger research programme focused on reconceptualising
strategy in the specific context of school leadership. Drawing on policy analysis, questionnaire and interview
data, this article proposes an alternate theoretical frame for strategy in educational leadership that takes into
account the various social, political, historical and cultural forces which seek to influence the behaviour of both
leaders and schools.

Macpherson, Reynold (2009), **How secondary principals view New Zealand's leadership preparation and
succession strategies: systematic professionalisation or amateurism through serial incompetence?**
in *Leading and Managing*, v15(2), pp44-58, Spring/Summer.
Abstract: Age demographics in the New Zealand education workforce require substantial numbers to fill
leadership roles from 2010 when Baby Boomers will accelerate their retirement. This research note reports the
current attitudes and intentions of a sample of 14 secondary principals towards preparing for, and succeeding
into, educational leadership roles at different levels.

Service, Brenda (2011), **It Is Action-love: An Evaluation of the Impact of a New Zealand Secondary School
Principal's Increased Visibility around the School** in *Journal of Educational Leadership, Policy and Practice,*
Vol. 26, No. 1, pp70-83.
Abstract: This article describes evaluation of the impact of a New Zealand secondary school principal's initiative to
support the development of teacher capacity and develop relational trust in his school.

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