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CONSULTANCY

Supporting Head Teachers by Consultancy

It has been widely renowned that leadership is one of the school factors that influence pupils' learning achievements. Fast changes in the society, ever faster waves of migrations, changing roles and structures of families, use of ICT and new ways of communication, etc. claim for continuous adaptations and innovative approaches to school leadership. Head teachers often find themselves in situations of being incapable of finding solutions for challenges they have to cope with. In spite of the fact that head teachers can attend pre-service training, they often claim that they miss further training and support, as summarised in the OECD study (Schleicher, 2012, 19-20). They show that consultancy is even more important than training as it is more focused on individual challenges. Comparative studies of life-long learning programmes for head teachers (i.e. Alsbury and Hackmann, 2006, Daresh 2001, Murphy and Vriesenga 2004, Pont, Nusche and Moorman 2007, Lumby, Crow and Pashiardis 2008) indicate that head teachers need external support, namely consultancy, in addition to training in all phases of their career. For actually, the authors even prefer counselling to training as it is more focused on individual challenges and it allows for taking into account the context in which the head teacher works. Evaluations of the programmes delivered by The National School for Leadership in Education Slovenia which have included some elements of support, point to the similar needs. We refer to evaluations of two programmes: Consultancy in managerial area (Ussai, Štritof, Kuk Žgajnar and Ledezma 2013) and Mentoring for Newly Appointed head Teachers (Erčulj and Sagadin 2012). This leads us to the conclusion that head teachers need continuous and systematic support in pedagogical leadership (i.e. observing lessons, running annual review meetings, managing conflicts, change management, planning, etc.) and management (i.e. managing the process of employment and dismissal, managing finance, preparing and managing internal files, etc.). The need for stronger support and system solutions especially in managerial issues has been expressed by head teachers themselves through their professional associations.

Introducing support at the system level is therefore reasonable only in combination with training. In such a context we can understand support as a flexible type of help that head teachers can access whenever they need it. Besides, it can much better consider the context and situation compared to training. Although the notion of support was extended to distributed leadership and managing head teacher's career within the project, it is usually related to counselling. Consultancy is a type of support where external expert helps the head teacher to analyse practice in specific situation or specific problem and improve it. Within this project, the role of external experts was taken by the employees of The National School for Leadership in Education and a group of experienced head teachers who proved appropriate competences for consultancy in specific areas. They were called "head teachers - experts" for the purpose of this project.

Project objectives and indicators for consultancy

Indicators, planned for the field consultancy envisaged the inclusion of minimum of 119 educational institutions for the pilot implementation of consultancy. The following types of consultancy were realised:

- 21 upgraded consultancy visits at the seats of educational institutions;
- 42 consultancy visits with the help of head teachers – experts;
- 56 consultancy sessions for regional groups of head teachers.

OBJECTIVES:

The following objectives were set for the field of consultancy focused on technical, relational and content aspects of consultancy:

- To design and implement the guidelines for the process of consultancy. These guidelines refer to the technical aspect of consultancy, embracing design, implementation, and working methods.
- Establish and implement professional relationship between the consultant and consultee. Trust, trustworthiness and critical friendship should be mostly emphasised.
- To carry out consultancy focused on the content that should be topical, applicable and reliable.

Beside this, we agreed within the group about the following:

- To develop the protocol for consultancy;
- To carry out training for head teachers – experts for the process of consultancy;
- To carry out preparation and training for head teachers – experts for the content of consultancy.

Definition and the purpose of consultancy

Consultancy is the type of support for head teachers that is not based on giving advice; it helps them find solutions for their own problems. It is focused on current challenges and must be adaptive to everyday changes; therefore it is distinctively of contextual nature. It should be carried out in a way that provokes consultee's conscious decisions, so that the consultant does not offer concrete solutions. Kubr (2005, 3) similarly defines consultancy as any type of support or help in terms of the content, process or structure of tasks without any direct responsibility for their implementation from the consultant's side. The consultant helps those who are actually responsible. Forbe's study of the best consultancy firms (Forbes 2013) indicates that the most significant achievements in consultancy may be the opportunities to get an external view on the problem, without the consultant's personal involvement in organisational relations which may increase the potential of finding the appropriate solutions. Turner (1982, 2) suggests that consultancy should be considered mainly through its purpose and therefore discusses the so called "hierarchy of purposes." They are divided into traditional and additional ones. Traditional purposes include ensuring information, problem solving, diagnosing to enable re-definition of the problem, preparation of reports and help during the implementation of improvement. Consultancy, as designed in our project, imply very important "additional purposes" that include consultee's responsibility for the solution of the problem, promoting his/her learning and finally, improving organisational effectiveness.

The basic aim of consultancy as developed within this project is to ensure support or help for head teachers in solving concrete challenges in leadership. Taking into account the above mentioned issues, the purpose of the

consultancy should be extended, namely:

- Providing information and help to define the problem;
- Taking independent view without personal involvement;
- Support in the process of searching for the consultee's own solution;
- Raising awareness of the consultee's responsibility for solving the problem;
- Promoting the consultee's learning for improving his/her leadership practice.

Taking into account the above stated issues, we paid special attention to the so called "additional purposes" of consultancy often neglected in practice. They were built into all types of counselling to ensure that the long-term purpose, i.e. to improve school leadership practice and school effectiveness, consequently, is not neglected.

Types of consultancy

Consultancy to head teachers has not been regulated at the system level in Slovenia. State of the arts in this field (Erčulj and Goljat Prelogar, 2016) indicates strong need for counselling. The need has been expressed more explicitly in the domain of management than in the domain of pedagogical leadership. It has been established that head teachers search for their own ways of support offered by the ministry in charge, public institutes, faculties, trade unions and individuals or individual firms dealing with consultancy. Head teachers stated mainly various addresses where they can get advice or support rather than any kind of system approach to consultancy as a type of support that would provide consultancy embracing the above stated purposes. Previous experiences with introduction of consultancy in The National School for Leadership in Education were limited to legal issues where we could use and upgrade the existing types of consultancy visits at the seats of educational institutions. Other types of consultancy were new to us so we were looking for solutions in the international practice. Making an overview of consultancy practice to head teachers in the international arena we found that there some sources of consultancy exist in different educational systems mainly for head teachers in their first years of headship or as mentoring to newly appointed head teachers. Programmes of support in later stages of head teachers' career are more exceptions than the rule. Looking at consultancy for head teachers (Erčulj and Goljat Prelogar, 2016, 7), we mainly came across mentoring and/or coaching considering that it has been a relatively new issue in leadership. It means for our case that we introduced new and innovative types of consultancy for head teachers.

The following types of consultancy were carried out:

- **Consultancy visits at the seats of educational institutions:** We gained certain experiences with this type of consultancy in previous projects. Evaluation of consultancy visits (Ussai, Štritof, Kuk Žgajnar and Ledezma 2013) indicates that they were useful and well accepted but they do not provide head teachers enough support in solving specific recommendations. Upgrading of consultancy visits at the seats of educational institutions firstly aimed at getting to know specific obstacles and head teachers' need in the implementation of recommendations by experts and to advise and participate in searching for solutions with participation of head teachers – experts as the next step. Consultancy visits were carried out exclusively for managerial tasks. In some pilot visits head teachers – experts participated.
- **E-consultancy in the field of management:** The existing forms of e-counselling were based on answers to questions by the use of information system while the new programme set up a new system of e-consultancy which allows asking additional clarifications and sub-questions. This allows the transition from simple answering the questions to e-consultancy in the field of management.

- **Consultancy to regional groups of head teachers:** This was a new type of consultancy within our project. Consultancy provided to regional groups means that several head teachers are reached at the same time and it allows for immediate exchange of good practice. This means that it is a combination of consultancy provided by experts from the National School for Leadership in Education and exchange of good practice among head teachers and directors, i.e. among the participants of consultancy to regional groups. As those are still relatively small groups (5 – 6 head teachers in a regional group), individual approach is still possible. It can be focused on current head teachers' problems which can ensure the contextual nature of consultancy and as such it follows the basic purpose. Setting up of the groups (regional groups) was based on the existing non-formal systems of connecting head teachers but on connecting of head teachers who are regionally close. Consultancy to regional groups of head teachers were carried out in the field of management, and prevention of and managing violence. In the latter field, head teachers – experts were involved. They had undergone special training for this special content of consultancy.
- **Consultancy at educational institutions with the help of head teachers – experts:** This was also a completely new form of consultancy in the field of pedagogical leadership as far as the content and the method of work are concerned. Consultancy was carried out with the help of qualified head teachers – experts so called exclusively in the context of this project. By introducing such a new concept of consultancy with the help of head teachers – experts we wanted to pilot consultancy in which theory and practice would be better intertwined. Consultancy in the field of leadership is often carried out by specially qualified consultants or experienced managers who have developed certain practice and possess specific knowledge that can be offered to support others. Adequacy of such approach with participation of head teachers – experts was piloted within the project. We accommodated both aspects because consultancy was carried out by the experts as well as by head teachers – experts. The latter are experienced head teachers who acquired competences needed to consult and proved them by relevant certificates (i.e. certificate of coaching, certificate of being a qualified mentor to newly appointed head teacher and/or external evaluator), by certificates of participation in projects or by professional or scientific papers.

Head teachers – experts were selected on the basis of a public tender by the following conditions and criteria:

- a. Region of the seat of the institution;
- b. Even representation according to the level of education (pre-school, basic school, high school);
- c. Work experience in headship – preference was given to head teachers with at least 2 terms of headship;
- d. Proven competences for consultancy by certificates of successfully completed programmes, such as coaching, mediation, training for external evaluator, training for mentoring newly appointed head teachers, etc.;
- e. Other competences in leadership proven by certificates of participation in projects, professional papers or other evidence.

Consultancy with head teachers - experts

While designing consultancy, we paid special attention to consultancy in cooperation with head teachers – experts. We talk about peer consultancy with special emphasis on interactive process between two experts. The purpose of this type of consultancy is better understanding of good practice, namely leadership practice in our case (Becker 2000). These types of consultancy are carried out when we would like to (Montesol Johnson in Rigby 2012):

- Share good practice by collaboration and reflection;
- Encourage problem solving;
- Reduce isolation in the profession;
- To design the forum for solving the problems of the profession;
- To encourage and introduce new solution.

These are exactly the features of consultancy in cooperation with head teachers – experts to those head teachers who would like to improve their practice in certain area(s). Therefore it is important to emphasise equal relationship and mutual learning that contribute to the improvement of leadership in all schools. Such type of consultancy implies a component of head teachers' social responsibility for applying their knowledge to improve educational leadership as a whole rather than using their knowledge and experiences only to improve leadership in their own institution. The consultant must be aware that he/she counsels an expert so he/she should not evaluate the consultee's practice but help him/her improve it while the consultant also is learning himself/herself.

Inclusion of head teachers – experts was primarily aimed for carrying out only consultancy with the help of head teachers – experts, but later on they were included also in upgraded consultancy visits at the seats of educational institutions and for pilot implementation of consultancy to regional groups.

Preparatory activities for consultancy

Implementation of consultancy visits and consultancy to regional groups did not require substantial preparatory activities as they were mostly carried out by the experts of the National School for Leadership in Education who were well knowledgeable about the contents and had some previous experience in consultancy in the field of management. However, more preparatory activities were carried out regarding consultancy with the help of head teachers – experts. It is about the introduction of a completely new approach to consultancy and so we put special emphasis on it. This type of consultancy also requires clear expectations of both participants while the relationship and trust may be even more important than in the case of consultancy of external experts. The relationship is particularly sensitive and vulnerable when it comes to peer consultancy which exceeds the marketing relations usually established with external consultants (Sturdy, Wright and Wylie 2015). Maister, Green and Galford (2001) believe that the success of the entire process can be essentially limited if the importance of establishing trust is neglected. However, trust is not taken-for granted in this relationship; moreover, the consultant must act in a way that the consultee is convinced about his/her trustworthiness. The basic rule in this process is that the consultant does not put himself/herself in the forefront, can manage his/her ego and is ready for cooperation with the consultee the whole time. For that reason the selection and preparation of head teachers – experts were so crucial and sensitive at the same time.

The authors dealing with consultancy (Forbes 2013, Maister, Green and Galford 2001, Turner 1982, Kubr 2005, Pauwels Consulting 2014) mention several competences of effective or trustworthy consultants. During the preparation of head teachers – experts the following competences were emphasised. He/she should:

- Have a broad view and be attentive to details at the same time;
- Master communication, particularly asking questions and listening;
- Be acquainted with his/her own weaknesses and take regular training courses;
- Be ready to learn from literature and also from the consultee's experiences;
- Network and collaborate with others;
- Manage tensions and potential conflicts;
- Be capable of critical thinking;
- Be capable of taking the "helicopter view" on the consultee's problem.

7 workshops were carried out in order to prepare head teachers – experts for consultancy. All of them were designed to strengthen the consultants' competences.

- In the Workshop 1 the concept of consultancy, professional basis and principles of peer consultancy, actions and responsibilities of the consultant, needs and expectations of the consultees were presented. The needs and expectations were recognized on the basis of the need analysis of the participating consultees. Consultants were assigned to the needs in specific areas.
- In the Workshop 2 and 3 consultants got familiar with the principles of coaching so that they could use of its some elements in the process of consultancy.
- During the whole period of preparation head teachers – experts were deepening their knowledge individually in their field of consultancy. So Workshops 4 and 5 were aimed to the content of the selected fields of consultancy. Every head teachers – expert had to prepare a professional record (paper) of good practice in his/her field of consultancy. The collection of papers was published in June 2019; it will also be available on the web page of the project.
- In the Workshop 6 the Consultancy Protocol was presented to head teachers- experts into details

The process of consultancy and the role of the consultant

In accordance with the above stressed purpose of consultancy, it is important to develop a detailed course of action. Kubr (2005) divided it into 5 phases. We used his phases mainly as a standpoint for consultancy with the help of head teachers – experts and partly for consultancy to regional groups. Taking into account such division, we developed the consultancy protocol as a tool for head teachers – experts. Consultancy in four steps is foreseen in the protocol. Apart from the introductory meeting, 2 visits were carried out with not more than 4 weeks time period. Between the two visits certain activities were carried out defined during the first visit. Introductory meeting and the first visit were carried out by the representative of the National School for Leadership in Education (NSLE) and the head teacher – expert (HTE) while the head teacher – expert alone paid the second visit.

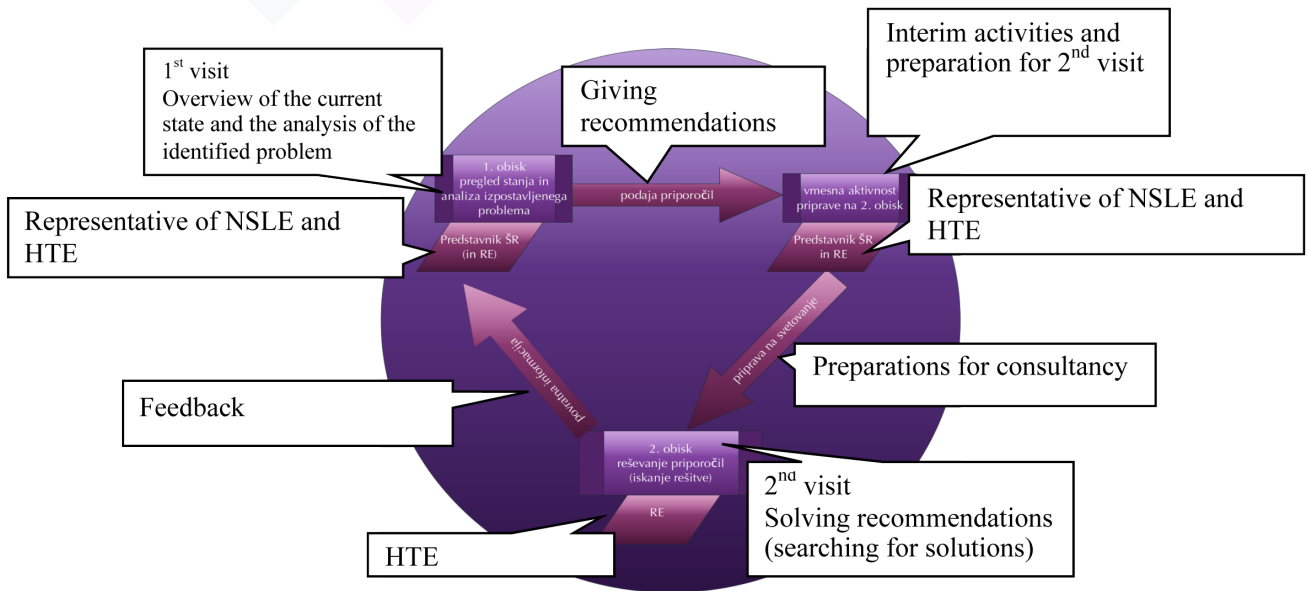


Figure 1: Course of actions in consultancy with the help of head teachers – experts

The consultancy protocol encompasses the following steps.

a. Introductory and preliminary meetings

The introductory meeting was aimed mainly to get to know the consultees and the consultants, the course of actions in consultancy and the estimated problem. The participants agreed on the date of the first visit. After the introductory meeting the expert from NSLE and the head teacher – expert carried out the preliminary meeting in order to agree upon the content and the course of consultancy. They also defined activities related to the preparation of consultancy.

b. First visit

The first meeting between the consultant and the consultee is important for effective consultancy. They have to agree why the consultees would like to be consulted. The consultant must get a detailed description of the consultee’s problem or needs for consultancy. This is the basis for the first analysis of the state. It is important that a cooperative relationship is established between the consultant and the consultee and that the analysis is done in a really cooperative way as much as possible. The consultant facilitates the consultee’s involvement by asking questions. This is the phase when the consultant must collect as many data, evidence as possible to be able to make the detailed analysis. During the first visit the head teacher – expert was accompanied by the expert from NSLE whole task was to help prepare the analysis of the state and the definition of the problem. The definition of the problem was followed by the discussion leading to the agreement about further activities related to consultancy, and key interim activities carried out by the consultant and the consultee. The first visit lasted up to 4 hours.

c. Interim activities

The interim activities were going between the first and the second visit according to the agreement about further course of actions in consultancy. The head teacher – expert and the expert from NSLE met in order to prepare for the implementation of the second visit carried out only by the head teacher – expert. In the meantime the consultees carried out the agreed interim activities; in most cases they had to prepare certain documents or professional discussions with their staff.

d. Second visit and closing of consultancy

The crucial aim of the second visit was searching for solutions by both the consultant and the consultee together. The head teacher – expert took care that the proposed solution was specific, legal, feasible, defined in time and content. He/she also monitored that the tasks and responsibilities in the course of implementing the proposed solution were precisely defined. This phase of consultancy requires a lot of creativity and system approach in searching for solutions – especially for those that are feasible regarding the usual situation in organisation.

In the closing phase of the second visit the head teacher – expert and the consultee evaluated the effectiveness of the given solution as well as their collaboration. They also agreed about possible further collaboration.

Implementation of consultancy

300 consultees participated in different types of consultancy within the project, namely:

- 21 consultancy visits at the seats of educational institutions. This type of consultancy was carried out exclusively in the management field focusing on the orderliness of internal files of educational institutions. We came across some head teachers' problems in previous consultancy regarding the implementation of recommendations based on consultancy visits. For this reason we piloted the inclusion of head teachers – experts in 7 consultancy visits. Additionally, we piloted how much the consultees can realise recommendations themselves as well as the hindrances and weaknesses of this type of consultancy.
- 151 E-consultancies (as on 16th May 2019) carried out through information system of NSLE (ŠRIS). E-consultancies referred to management exclusively, questions about employment relationships prevailed.
- 86 consultancies to regional groups of head teachers, 56 of them in the field of management carried out by the experts from NSLE. Further 30 consultancies were focused on managing and prevention of violence carried out by experts from NSLE in collaboration with head teachers – experts. Initial feedback on this type of consultancy indicates that it is about a very effective combination of group and individual consultancy – the latter was possible due to a small number of participants. The involvement of the experts from NSLE was recognised as crucial contribution to quality and proficiency of consultancy while the involvement of head teachers – experts was estimated as extremely important in the view of individual approach of peer consultancy. They emphasised mainly the quality of consultancy and opportunities to network for sharing knowledge and good practice.
- 42 consultancies with the help of head teachers – experts, of which 21 in the field of management, and 21 in the field of pedagogical leadership. Consultancies with the help of head teachers – experts were carried out according to the consultancy protocol. They proved to be the most challenging type of consultancy from different points of view: organisation and coordination, preparations for the content and time spent for consultancy. However, the implementation confirmed our anticipations that this type

of consultancy is the most effective in terms of the purposes of consultancy, i.e. an interactive process of collaboration between two professionals. The initial feedback given by the consultees confirmed that they had received information and support for solving the problems, that the consultants had given independent views from another points of view and that they had led the consultees to find their own solutions without imposing the consultants' quick fixes.

CONSULTANCY		
Type	Consultants	No. of consultancies
Consultancy visits at the seats of educational institutions	Experts from NSLE (in 7 cases head teachers – experts were involved)	21
Consultancies to regional groups of head teachers	Experts from NSLE (in 30 cases head teachers – experts were involved in the field of prevention of and managing violence)	86
Consultancies with the help of head teachers – experts	Head teachers – experts and experts from NSLE	42
TOTAL		149

Initial feedback on consultancies with the help of head teachers – experts was given by 36 of 42 consultees as a part of their reports. They answered 4 questions:

- What was good and what was weak?
- What else would you need to realize improvements?
- How did consultancy affect your leadership?
- What would you suggest to improve consultancy?

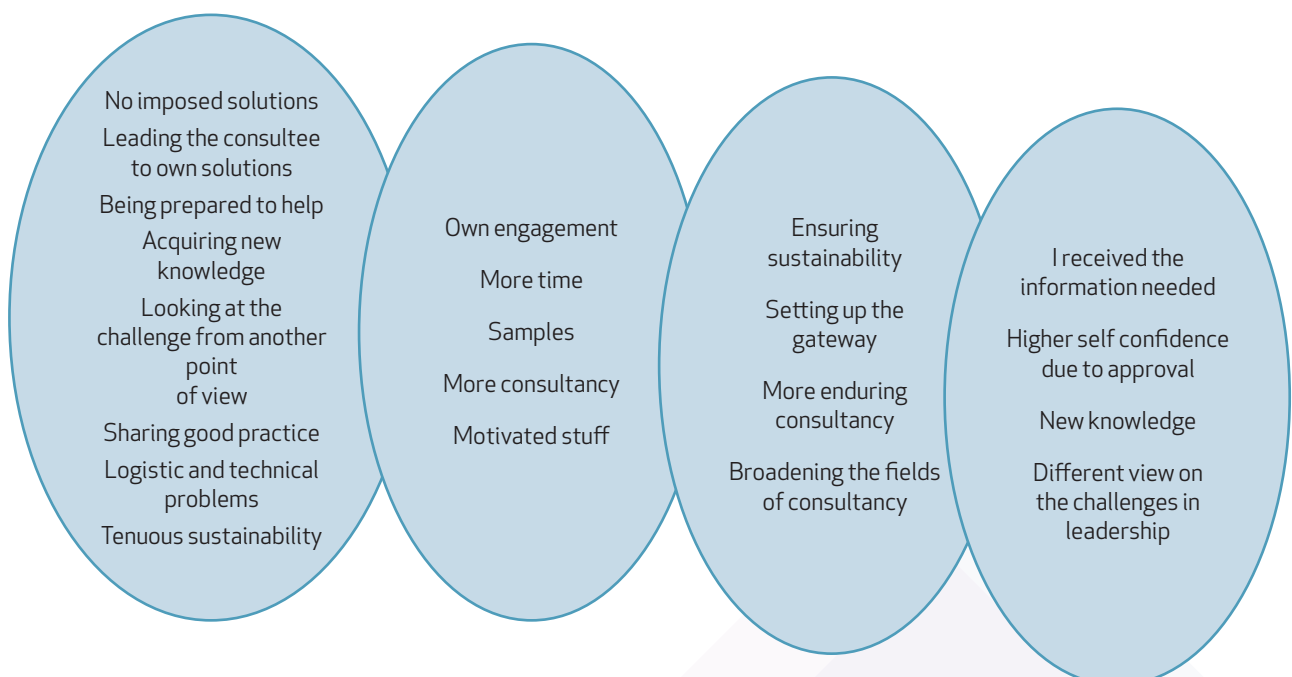


Figure 2: Results of the analysis of the reports on consultancies with the help of head teachers - experts

The overview of the reports pointed out that this type of consultancy was well appreciated by the consultees because the consultants did not impose the solutions – they were rather leading the consultees to find their own ones. The consultants' other points view on the problem were also helpful in searching for solutions. Consultees received information needed, new knowledge and a different view on the challenges in leadership. They recognised consultancy as a good opportunity for acquainting new knowledge, sharing good practice and for the improvements of their leadership practice, consequently. Only logistic problems and tenuous sustainability of such types of consultancy were mentioned as weaknesses.

It can be confirmed on the basis of initial feedback, consultants' experiences and responses to the implemented consultancies that head teachers in Slovenia miss consultancy as a system supported type of support to their leadership. Initial results of interim evaluation confirmed the appropriateness of the employed types of consultancy since they offered not only the solutions of the problems but also different views on their problems, acquiring or sharing knowledge and good practice. Last but not least it proved that the consultants are on the right way. More detailed results of evaluation presented in the chapter of evaluation activities within the project also prove our standpoint presented in the introductory section of this paper, namely that head teachers need not only training but also consultancy as support to their leadership.

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