

# Chapter 1

## Introduction

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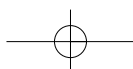
This chapter considers:

- > the definition of talent
- > talent for future schools
- > the nature of leadership
- > a model for leadership
- > the major themes and structure of the book.

### Background

Talent management is increasingly seen as a critical factor in developing successful organisations and is a strategic priority for businesses. It is just as critical a factor for schools. Indeed, in a people-focused organisation such as a school, the key resource is the talent of the individuals who work there. In education, the 'talent' could be considered as the critical factor in school success. We would prefer to use the term talent leadership as it expresses what the whole process is about. However, common practice uses the phrase talent management and for ease of use we have followed this convention in the book. The growing leadership skill shortage, difficulty in appointing head teachers (and other senior/middle leaders) and the work-life-balance agenda is leading to a shortage of people who are capable of making a difference to organisational performance. A focus on talent management will contribute to other strategic objectives, such as building a high-performance learning environment and building leadership in depth in the school. This is different from simple succession planning and filling typical hierarchical leadership roles that exist today, as it is a process of providing able and talented people who will create new and different leadership roles in the future.

This is particularly important for schools which are facing the challenge of developing innovative and imaginative leaders to meet the



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needs of school transformation. Individual schools need to develop a talent pool and to co-operate with other schools for cross-institutional development of leadership and curriculum talent. This is of significant interest to trusts, all-through schools, academy groups, federated schools and school network groups and school 'brands' where staff can be presented with a coherent developmental strategy, which may include planned work opportunities with different schools in the network. New staff or middle leaders could be provided with leadership opportunities across the institutions, such as award-bearing qualifications and in-house learning to systematically enhance the talent pool within the group.

It is not enough to attract people with high potential, there must be a planned strategy for managing their talents which is supported by processes to retain the commitment of talented people and properly use their abilities. The ability to attract and retain high-quality individuals is a key leadership challenge as the school community moves forward.

#### Definition

There are many views on the nature of talent. The Chartered Institute of Personnel and Development state:

*Talent consists of those individuals who can make a difference to organisational performance, either through their immediate contribution or in the longer term by demonstrating the highest levels of potential. (CIPD, 2007)*

Talent management is defined as a systematic and dynamic process of discovering, developing and sustaining talented individuals. What works in the talent management process depends on the context and the way the organisation implements practices. So talent management may be organisational specific and dependent on the context but could be defined as:

*Talent management is the systematic attraction, identification, development, engagement/retention and deployment of those individuals with high potential who are of particular value to an organisation. (CIPD, 2006)*

#### Talent for future schools

One of the key reasons for taking a talent management perspective is

that leaders need to focus on the staffing needs of their schools as they move forward into the future and not simply to concern themselves with simple succession planning of existing roles. In doing so, leaders need to address the following questions:

1. What will schools of the future look like?
2. How do we view leadership for these future schools?
3. What are the characteristics of future leaders?

### *1. What will schools of the future look like?*

This involves several ideas all starting from a consideration of the nature and dimensions of learning and how we need to construct human, organisational and structural arrangements to maximise the learning potential of each child. Initiatives such as Building Schools of the Future (BSF) and the new Academy Buildings have to not just represent 'best practice' but 'new practice' if a 'once in a generation' opportunity to refurbish and rebuild learning centres for our children is to be fully exploited. Most importantly, we should question how we lead and manage within those new building structures to create a successful framework for learning. Linking physical, structural, learning and leadership design needs talented individuals who can think 'outside the box'.

The establishment of the Every Child Matters (ECM) agenda in England and the consequent establishment of Children's Services, which draws together a number of departments of education and social provision for children, has radically altered how we view schools. Instead of isolated units just looking after the education of a group of children in catchment areas, schools are now at the centre of a network of services which attempt to coordinate provision for children and young people.

The provision of education has traditionally been a public sector responsibility with the small additional provision by independent schools. Within the public sector, state education has been just that, state education. Although the private sector would be commissioned to build schools or provide materials such as textbooks, their role was limited. Increasingly during the 1990s and with greater pace during the first decade of the 21st century, the role of the private sector as a provider and deliverer of public sector education has grown exponentially. Private sector organisations run schools on behalf of the state and local authority services are contracted out to private sector companies. Organisations are encouraged to establish groups of

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secondary schools or secondary school brands under the expansion of the Academy programme and the 'free schools' initiative with direct funding from central government thus by-passing local authority funding and local authority control.

The impact of technology has allowed students to be off-site or have multiple-site delivery of education which changes the way we conceptualise 'school' from a building to a process in a number of venues and locations with a number of delivery mechanisms. In considering talent development for future schools, we need to encompass a debate along these lines.

### *2. How do we view leadership for these future schools?*

Consideration of this question clearly needs an understanding of the key elements of leadership but this needs to be understood in the context of new patterns of leadership. These patterns include executive leadership, hard and soft federations, school groups and providers, co-leadership and shared leadership patterns. This new re-conceptualisation of leadership and school configurations under the broad title of system leadership is re-writing the traditional picture of school leadership. If these ideas are built onto our existing knowledge of distributed leadership, this does indeed force a radical rethink of leadership for schools in the future. Certainly, a leader in the future will need to be both innovative and entrepreneurial. This encompasses the need to transform the learning and teaching process by looking at innovative practice but also the means of acquiring and utilising resources needs a different mindset from that of the traditional educational leader. It is important, as we have discussed above, to encompass systems leadership within a networked relationship with other providers. We will develop this idea next.

### *3. What are the characteristics of future leaders?*

Talent management is the process of looking for individuals with the potential to lead, which is the focus for succeeding chapters, but it is worth emphasising that current performance is not the same as potential for future leadership, which may be a substantially different role. We suggest that these roles are likely to involve the ability to:

- > be change champions
- > be leaders of innovation

- > be flexible and able to live with ambiguity
- > grasp opportunities and be entrepreneurial.

The Hay Group (2008) see the change in leadership from formal management approaches to connected leadership approaches in the 21st century as follows:

<b>Formal management</b>	<b>Connected leadership</b>
Vertical	Horizontal
Hierarchical	Collegiate
Instruction	Dialogue
Constrained	Flexible
One-way	Two-way
Accountability	Reciprocity
Robust	Fragile
History irrelevant	History matters
Control of resource	Creation of trust

**Figure 1.1** *The difference between connected leadership roles and traditional management posts (Hay Group, 2008: 9)*

This figure shows how we can reconceptualise leadership for future schools from the more traditional approach to connected leadership.

## Changing organisational culture

<b>Current development culture</b>	↔	<b>Talent management culture</b>
Benchmark current practice		Be ahead of the curve
Reliable employees		Creative, challenging employees
Predictable promotion structures		New and different school structures
A job		A high performance role
Risk adverse		Adventuresome

**Figure 1.2** *Current and future leaders (adapted from Peters, 2005: 131)*

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Writers in the leadership literature tend to use ideas like those in Figure 1.2 to articulate the shift in organisational culture from a succession approach to a talent management approach.

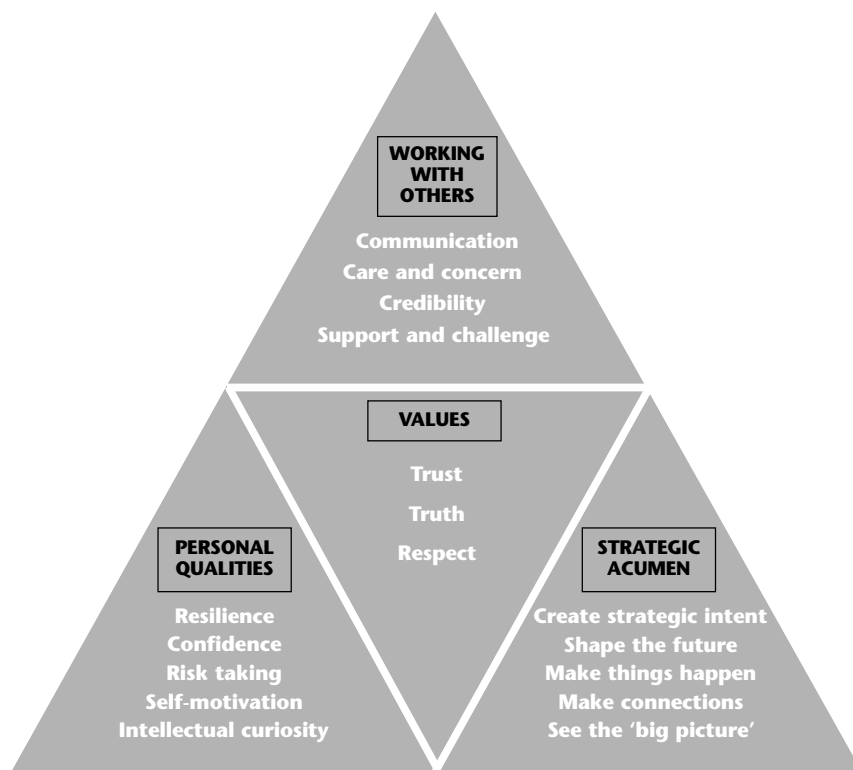
### So what does a potential leader look like?

Much has been written about leadership through the lenses of frameworks, tools and processes. We want to identify the essential aspects that dominate the debate about what effective leaders do in order to create a model which will give structure and guidance to our book. This model is necessary in order to help people conceptualise how to be better leaders and help those responsible for building better leadership. We offer a way of *thinking about* being a better leader and *being* a better leader. Both are necessary for the identification and development of potential leaders.

We believe that in being an effective leader you must start with yourself. Leaders need to model the behaviour they require from others and model what they want others to know. Effective leaders have a responsibility to help others to lead. If you lead well, success can be ensured for the present, and future success is secured if you enable others to learn the principles to lead well. We need some sort of structure and guidance and our model, in Figure 1.3, is a way of thinking about being a better leader and how to build better leadership aptitude.

The debate as to whether leaders are born or made is interesting and pertinent to the focus of this book. Adair (2006: 41) believes that 'the idea that leaders are born and not made is only half the truth'. We agree and believe that leaders may be 'half born' and have personal qualities, thoughts and natural abilities but experience, learning and practice provide the 'made' half. 'It takes a long time to become a natural leader' (Adair, 2006: 41). All leaders can become better, whatever their natural ability. If leadership drives action, then it is important to establish what we need people to get better at and use those elements to evaluate potential and how that potential will be developed. A potential leader could be a natural leader in one aspect of our model, for example their personal qualities. It would be unusual for this expertise to extend automatically to the other elements of the model. The potential leader may have mastery in these areas but could develop expertise if they are given the appropriate opportunities and experiences to learn.

It is easy to generate long lists of excellent ideas in order to answer 'What makes an effective leader?' Just ask your colleagues! We agree with the ideas listed in Figures 1.1 and 1.2 and would add that leaders need to build high-performing teams, need to ensure accountability, need to be emotionally intelligent, need to be able to communicate effectively and actively live the core values such as honesty and trust. We want to build an holistic framework to cover the landscape of leadership, to identify the key elements of what makes an effective leader. This will help us to identify potential leaders and enable leaders to get better. This we do next in our leadership model (Figure 1.3).



**Figure 1.3** *Key dimensions of leadership*

First, it is important to establish the need to be a *strategist*, and this forms the *first element* in our model. It is important for a leader to set the future direction for the school – being strategic is a way of managing the impact of future trends and influences on the school and being able to make conscious decisions about those influences. It is about setting priorities and using resources to achieve those priorities.

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Strategic leaders need to care about others in order to want to involve them. Individual leaders can make a difference but for sustainable organisations strength comes from staff working together to achieve the same goals (Barth, 1990). Leaders need to understand their school, those in the school community and those in the wider community (Davies, 2004). Understanding the school context and having *people skills* forms the *second element* of our model. Talent managers nurture and develop others, and get the best out of their colleagues. They find ways to engage others and feel a sense of personal contribution to a school's development.

The *third key element* of our model is the leader's *personal qualities*. What leaders know and do is important but who they are also determines what they can achieve. Most importantly, effective leaders motivate loyalty and support because of the way they behave, conducting themselves with integrity and trust. Effective leaders have the confidence to work with people who are, or have the ability to become, better than themselves.

We have mentioned moral standards as central to each of these elements, which is why *values* form the central element of our model. Values should be at the heart of everything we do, both organisationally and personally. While building a values framework is important, that they must be seen in action is critical. Each key element has a number of processes and ideas which will be explored in the forthcoming chapters. Each chapter enables us to identify a leadership challenge.

Our research suggests that the following would be a suitable template for considering talent management in schools:

<b>Defining organisational strategy and values</b>	Where are you going and what type of people do you want to help you to get there?
<b>Talent identification</b>	Evaluate your people: performance evaluation and performance challenge as a core activity.
<b>Talent development</b>	Establish powerful professional learning; develop structures to facilitate the process.
<b>Talent culture</b>	Become an employer of choice and create a success culture.
<b>The way forward</b>	Create a way forward through an integrated talent management model for the school.

**Figure 1.4** *The major themes of the book*



How these themes are developed through the individual chapters can be seen as follows:

## The structure of the book

### The Context

- 1 Introduction
- 2 Defining organisational strategy and values

### Section 1 – Talent Identification

- 3 Performance evaluation
- 4 Performance or potential?

### Section 2 – Talent Development

- 5 Talent development
- 6 Professional learning
- 7 The architecture to support talent development

### Section 3 – Talent Culture

- 8 Building a talent-management culture
- 9 School or system talent?

### The Way Forward

- 10 An integrated talent-management model for schools

## Chapter outlines

All the chapters will explain the key concepts and provide frameworks for leaders to apply the ideas in their organisation. This practical application of the theory will be enhanced through insights from practice and vignettes of exemplary shareable practice.

### *The context*

#### **1. Introduction**

This chapter will explore the nature and dimensions of talent management and explains the difference between succession planning, defined as ‘preparing people for current jobs’, and talent management seen as ‘developing talented individuals for the changing nature of schools in the future’. The chapter establishes a leadership model for talent management.

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### **2. Defining organisational strategy and values**

If you cannot define the values on which your organisation is based and where your organisation wants to go, then recruiting individuals who will fit your value set and culture and who will want to join you in your leadership journey is very difficult! This chapter looks at defining strategy and values as the bedrock of all leadership and management processes including talent management.

#### *Section 1 Talent identification*

### **3. Performance evaluation**

The first stage in talent management is evaluating the talent already evident in the school, developing a staffing map and defining staffing needs for the present and the future. This involves critical and honest judgements and conversations with all members of staff. It is too easy to see this as only necessary to address the problem of underperformance, and while this is vital so is challenging all levels of performance and providing a framework for all to improve. It is critically important to identify the small group of highly talented individuals who will contribute to a high-performing and sustainable school of the future.

### **4. Performance or potential?**

One of the most critical dimensions of talent management is to be able to distinguish between the current performance of the individual and the future potential to undertake a leadership role. Current performance is not necessarily a good measure of future potential. This chapter will examine this dilemma leading into factors to support identification, which will be discussed in the next chapter.

#### *Section 2 Talent development*

### **5. Talent development**

This chapter looks at how effective schools develop leadership by initially providing frameworks for the individual and the school to evaluate leadership skills. It then looks at a variety of learning activities which can develop leadership talent. It proposes a five-stage process to deepen the understanding of leadership development and how these might be configured as stages in leadership enhancement.

### **6. Professional learning**

In this chapter, we consider the establishment of a framework for learn-

ing skills, behaviours and opportunities that promote leadership development. Critical to this process is the concept of leaders as lead learners. The chapter goes on to consider the sort of learning opportunities that develop leadership potential and how schools can develop a culture of leadership learning.

### **7. The architecture to support talent development**

This chapter will consider how schools could set up the architecture for identifying talent, recording talent development and outlining future needs from an organisational and an individual perspective. It will present major case studies of the approaches of a primary school and a secondary school.

### *Section 3 Talent culture*

#### **8. Building a talent-management culture**

If sustainable development is to be achieved for each individual member of staff and the school as an organisation, then a talent management culture needs to exist across the organisation. This chapter will highlight what successful practice looks like, with case examples from several schools which exemplify what a talent culture 'feels' and 'looks' like. This involves becoming a talent developer and engager. This chapter will also be concerned with the central question of how an individual school can become an 'employer of choice', where there will be a pool of individuals wanting to work for the school and where the school is able to retain and sustain talent.

#### **9. School or system talent?**

This chapter will address whether individual schools can develop their own talent systems or whether partnerships or federations are needed to maximise opportunities such as 'managed moves' and school-based award-bearing activities.

### *The way forward*

#### **10. An integrated talent-management model for schools**

The threads of the book will be drawn together in this final chapter and present an action plan for schools to move forward in this exciting and innovative area.

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### Suggested further reading

CIPD (2006) *Talent Management: Understanding the Dimensions*. London: CIPD.

CIPD (2007) *Talent: Strategy, Management, Measurement*. London: CIPD.

Cross, A. (2007) *Talent Management Pocketbook*. Alresford, Hants: Management Pocketbooks Ltd.

Peters, T. (2005) *Talent: Develop it, Sell it, Be it*. London: Dorling Kindersley.

### An initial reflection

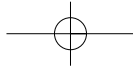
Throughout the book, we have used a number of reflection points, evaluations, questions and inventories. As a starting point, readers may wish to discuss the following inventory with a colleague to evaluate their current talent development practice. If you score five for each question, you may think that you do not need to read the book!

### Where are you now with talent management?

For each statement below, indicate how accurately the statement describes your school.

'1' indicates 'rarely', on a graded scale to '5' which indicates 'always'.

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1. We have a clearly articulated set of core values.  | 1 | 2 | 3 | 4 | 5 |
| 2. The values are demonstrated in daily behaviours.   | 1 | 2 | 3 | 4 | 5 |
| 3. We have a strategic plan which includes talent development.                                      | 1 | 2 | 3 | 4 | 5 |
| 4. We have an effective performance management process which supports the identification of talent. | 1 | 2 | 3 | 4 | 5 |
| 5. We are able to discriminate between current performance and future potential of staff.           | 1 | 2 | 3 | 4 | 5 |
| 6. We can map the behaviours, skills and attitudes which need to be developed in potential leaders. | 1 | 2 | 3 | 4 | 5 |
| 7. Our professional learning includes specific opportunities to develop leadership potential.       | 1 | 2 | 3 | 4 | 5 |
| 8. We have pathways, programmes and processes to facilitate the development of talent.              | 1 | 2 | 3 | 4 | 5 |
| 9. Our culture enables the celebration of everyone's contribution                                   | 1 | 2 | 3 | 4 | 5 |
| 10. We work in partnership with others to develop talent in a more effective way.                   | 1 | 2 | 3 | 4 | 5 |



## Chapter 2

# Defining organisational strategy and values

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This chapter considers:

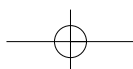
- > developing a strategic approach
- > the characteristics of strategic talent development
- > defining and developing values in a school
- > values and the leader.

It is important to define the values on which your organisation is based and define where your organisation wants to go, then recruiting individuals who will fit into your value set and culture and who will want to join you in your leadership journey is very difficult!

### Why a strategic approach?

A major challenge for leaders in schools is to both address the short-term organisational imperatives and to build a longer-term strategic framework through which to develop the school into new and exciting areas. Clearly, you cannot develop future leadership talent if you do not have a view of where the school is going and have a framework that allows the school to plan and enact that journey. So initially basic questions such as, 'Where are we going?', 'What sort of organisation do we want to be?' and 'What will be the key factors in our successful development?' need to be answered and need to be part of the strategy-building process. It is only when this strategic vision and framework exists that matching talent to the needs of the school can begin.

In defining a strategic approach, a useful way of thinking about strategy can be encapsulated in five concepts. The first concerns the desired nature of the school in the future. This is trying to answer



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'Where are we going and what sort of school do we want to be?' In attempting to confront these issues, it is essential to consider what sort of individuals and teams we need to enable us to move forward and develop into that sort of organisation.

The second concept relates to a time frame. Here, it is useful to consider that operational decisions take a one- to two-year time frame whereas strategy involves a three- to five-year time frame. This is important if we are trying to develop strategic talent. It requires a focus on developing individuals for the organisation of the future and gives the school time to build that capacity. There is always the danger of 'solutionism', for example considering what the problem is and what the solution would be in terms of finding instant answers. It is more important to think in terms of what the challenges are and how we build capacity to fully understand the nature and dimensions of those challenges. Then we should move on to consider what we need to do to address that challenge and how we need to change in order to be able to do so.

The third concept concerns the ability to keep a broad perspective of the nature of future developments. We have said earlier that what organisations need to do is to recruit and develop talented individuals and mould and adapt their organisational roles to fully utilise their talents. This is different from saying in five years' time we need someone with a specific skill set to replace an existing defined role after someone retires. The nature and shape of the organisation are evolving and changing and we need to incorporate broad themes of these changes and not get over-concerned with the minutiae of incremental planning.

Fourth, strategy should provide a link between short-term and medium-term planning in that a strategic framework or approach should provide a template against which to judge short-term actions. If there is not a sense of strategic direction, then it is impossible to assess whether short-term actions are contributing to longer-term goals.

Fifth, strategy should be a means of marshalling and directing resources to the achievement of organisational goals. It should enable an organisation to focus on its key activities and determine how to prioritise resources to achieve them. Central to this strategic focus is the development of the talented individuals in order to contribute to the achievement of those strategic goals. Clearly, you need to know where you are going in order to know which people you need to get you there. If you do know where you want to get to, there is a better chance of enabling the right set of people to work towards that goal.

In determining a strategy, it is possible to use a number of approaches. One is strategic planning. Strategic planning is a rational, linear and predictable approach to setting the direction of the school. It assumes you know what you want to achieve, what stages you need to go through and what the outcome will be. This can be summarised as 'who does what?', 'when?' and 'how?' and 'how do we know when it has been done?' The key to successful strategic planning is a focused approach so that a school concentrates on four or five major themes (Davies, 2011). While this is a valuable approach, it has its limitations. One of the ways of coping with the limitations is to build an emergent strategy process into the more linear approach of strategic planning. Emergent strategy is a reactive and reflective approach to changes within the environment. As events and requirements change, so leadership teams need to make sense of those changes and new strategies and approaches emerge. Thus, the original strategic plan is amended and changed as the organisation moves forward in a changing environment.

Schools deal with some challenges that are multi-dimensional and complex. While they may know the desired outcome they want to achieve, they may not fully understand the nature and dimensions of the strategic challenge and may need to build a fuller understanding before they can move forward. This is where strategic leaders demonstrate their creativity by setting strategic intents and building capacity to first fully understand the nature and dimensions of the challenge and then seeking information and examples of excellent practice elsewhere to build and create a new way of tackling the challenge before moving on to a more formal planning state. Strategic intents are often concerned with raising the achievement of the school in difficult areas which often involves deep-seated cultural attitudes in the school. Examples would be moving from a simple incremental school improvement approach to one which creates a high achievement and success culture where students believe they can achieve, where staff expect more of the children and the community and parents are re-engaged as active supporters of their children's education. This involves complex levels of understanding and building a way of moving forward. Effective strategic leaders operate on the rational side by creating strategic plans although adjusting them with emergent strategy insights, while at the same time creating strategic intents which will enable the school to make strategic leaps in performance in areas which need radical reform and change. This can be summarised by the ABCD model in Figure 2.1:

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Articulate	1	Current understanding and desired new strategy
Build	2	Images Metaphors Experiences of desired new understanding
Create	3	Dialogue and conversations Shared understanding to frame new understandings
Define	4	Establish formal plans and frame of reference for the school

**Figure 2.1** *The ABCD model (Davies, 2011)*

The key strategic leadership attribute is to be able to move through the first three stages, in Figure 2.1, of building strategic intents before defining the final plan. With strategic planning, it is possible to move straight to level 4, however sustainable strategic change which encompasses complex problems, necessitates building a culture of understanding and involvement before that level 4 planning and implementation can begin. This capacity change is one of the significant differences between a strategic and an operational leader.

In building a strategic direction for the school, it is important that a strategic framework exists so that a talent map can be established. This means that the appropriate individuals can be recruited and/or developed to meet those longer-term organisational needs. While in many cases this can be seen as a rational and even linear process so that key staff attributes and abilities can be defined and developed, it is not always the case. The creativity that organisations need to define and meet the challenge of strategic intents often needs divergent thinkers who can cope with complexity and cultural change. In this case, having the creative leadership talent may be more important than having individuals who can fulfil specific positions within the organisation. The following diagnostic inventory is worth considering to support your review of your strategic leadership skills.



## How strategic is your leadership?

For each statement below, indicate how accurately the statement describes you.

'1' indicates 'rarely,' on a graded scale to '5' which indicates 'always'.

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1. I balance the longer-term view with shorter-term operational pressures.                | 1 | 2 | 3 | 4 | 5 |
| 2. I take a 'helicopter view' and rise above everyday operational detail.                 | 1 | 2 | 3 | 4 | 5 |
| 3. I compare the potential short- and long-term consequences of actions I'm considering.  | 1 | 2 | 3 | 4 | 5 |
| 4. I understand the difference between strategic planning and strategic intent.           | 1 | 2 | 3 | 4 | 5 |
| 5. I look for opportunities today that might generate valuable results tomorrow.          | 1 | 2 | 3 | 4 | 5 |
| 6. I question my own long-standing assumptions and encourage others to question theirs.   | 1 | 2 | 3 | 4 | 5 |
| 7. I can turn strategy into action.   | 1 | 2 | 3 | 4 | 5 |
| 8. I can involve staff groups in strategic conversations.                                 | 1 | 2 | 3 | 4 | 5 |
| 9. I understand how the wider political and cultural environment affects my organisation. | 1 | 2 | 3 | 4 | 5 |
| 10. I can mobilise others to achieve strategic objectives.                                | 1 | 2 | 3 | 4 | 5 |

## Characteristics of strategic talent developers

The ability to build strategic plans and create strategic intents is necessary if a strategic framework is to be established upon which a talent development framework can be built. The leaders of a school also need to display and enact other strategic leadership skills and attributes. We would highlight three: (i) strategic talent developers are strategic thinkers; (ii) strategic talent developers are strategic learners; and (iii) strategic talent developers exert strategic influence. We will look at each of these qualities in turn.

(i) Strategic talent developers are strategic thinkers. It is vital to think of strategy as aligned to strategic thinking as a means of developing a strategic perspective rather than just the traditional view of strategy being linked to mechanistic strategic plans. What are the activities that a strategic leader has to engage in to develop this strategic perspective? The first is scanning. This involves scanning the environment in its political, economic and educational dimensions to identify ideas and trends that will impact on the school in the

succeeding years so that strategic leaders can identify them and devise approaches to utilise them and position the school to maximise its future opportunities. The second is envisioning a new and desirable future for the school based on the information gained from the scanning process and relating that to the school's capacity to change and develop. The third is reframing the process, of setting the new future in context and finally making sense of that for the staff and students of the school. This often involves engaging in a strategic process and building new mental models.

During this process of strategic thinking, strategic leaders engage in synthesis as well as analysis. The importance of this is not to break everything down into its component parts and risk 'paralysis by analysis' but to see how the components can fit together and build an integrated successful whole. Effective schools have a success culture which is an integration of a number of elements built up over a period of time. It is this synthesis of good ideas and outstanding practice that creates a success culture. What is needed, very often, is nonlinear as well as linear thinking. Strategic leaders are able to think 'outside the box' and engage in tangential thinking that can incorporate new and innovative ways of doing things. It moves away from the step-by-step incremental approach and breaks new ground by considering alternative possibilities. Strategic thinking engages the heart as well as the head. It involves the values and beliefs of the strategic leader, which are implicit in the way they think, as much as the more public explanations of policy. Finally, strategic thinking can be visual as well as verbal. The systems thinking concept of rich pictures (Jackson, 2003) is useful here. Consider what a great school would look like – how could you see it in terms of its buildings and the interactions of its people? One of the key talents of strategic leaders is that they are able to create rich pictures of the future which individuals can see and understand and so they become part of the collective imagination of what is possible in the future.

(ii) Strategic talent developers are strategic learners. If the leader is not constantly seeking new knowledge and insights, they fail to move the organisation on and importantly fail to provide a model for staff and students. If the leader cannot be a strategic learner, there is little chance that defining the talent needed for the future can be defined and developed. Hughes and Beatty (2005: 74) adapt work from systems theory and apply it to how strategic leaders can learn. Learning for strategic leaders may involve:

- > Looking at the big picture – what can I learn from the broader environment?
- > Looking for patterns over time – how can I learn from data and seek patterns in the data so as to extract useful information?
- > Looking for complex interactions – how can I synergise and learn from interrelationships?
- > Understanding what causes what – learning that it may be more complex than it seems.
- > Making time for reflection on models, theories and experiences.

Strategic leaders do not leave learning to chance; they set up the organisational framework to ensure it happens for themselves and others. A good way to look at this is to consider organisational culture, structure and systems which support strategic learning.

Organisational culture sets the tone for how learning is thought of in the school. The culture should be one where learning is seen as integral to the leadership role in order to develop and improve, not something that is a one-off and where once it has been achieved there is nothing more to learn. Is the learning culture that of knowledge transfer, something that you learn and pass on or something that you enquire about and develop and share? These cultural frameworks often reflect the difference between shallow knowledge and deep learning. The latter encompasses wisdom and understanding. These issues of strategic learning will be developed further in Chapter 6.

Organisational structures also strongly influence the learning of the leaders and the staff and children. If the majority of the time leaders and staff concentrate on operational and task issues and do not prioritise strategic and reflective discussions, then clearly little deep learning will take place. Organisational structures, such as splitting the strategic and operational functions into different meetings and different review cycles, emphasise the importance of the strategic dimension. Often, meetings have strategic issues tacked onto operational agendas. There should be a clear strategic meeting and review cycle in schools.

Systems in schools need to give attention to learning issues and strategic issues and not just to the urgency of operational demands if staff are to become reflective learners. One of the key leadership concepts is that leaders need first to look after themselves if they are then to look after the team and then the team can look after the organisation. The key to looking after oneself is to refresh oneself as a learner and to reflect on future directions and practice.

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(iii) Strategic talent developers exert strategic influence. Strategic influence is based on how leaders gain commitment to the vision and direction of the school from those who work and learn in the organisation. If the school is not only to achieve improved outcomes and outputs but to do so in a sustainable way, then involving others and getting them on board is critical to its achievement. How can strategic leaders influence others to come on the strategic journey of the school? What follows are a number of factors that shape the leader's ability to influence others.

The first part of the influence-building process is to consider how people react to the leader and therefore the first stage is for the leader to look at his/her own leadership style and skills. Strategic leaders need to build trust with their colleagues and staff so others can believe in their motivations and their integrity. Important in this is how others perceive the leader and how effective she/he is at communicating those values and attributes. This credibility has two components: first, the credibility that comes from expertise and the ability to do the job; second, the credibility that comes from the character and integrity of the individual.

Strongly linked to this idea is the leader's own passion (Davies and Brighouse, 2008) for education and the role they can play in enhancing children's learning and life chances. Effective strategic leaders make opportunities to articulate their passion for education and to articulate what drives them to create a sense of moral purpose. Effective strategic leaders establish a credibility base grounded on doing what is best for the students and calling on all staff to make a difference through their interactions and role in the school. Moral leadership clearly needs to go beyond the rhetoric. The expression 'see something – do something about it' is a leadership value which needs to permeate the behaviour of all staff. The leader needs to create a moral purpose that translates ideals into action and is the initial catalyst of influence building.

Influencing others by involving them in the process is the starting place but there are a number of other significant factors. Clearly, building a foundation of understanding across the school is based on clear criteria for success but also on effective relationships so staff are involved in the process.

The purpose of this is to create a shared language and set of values so that the strategic leader connects to the 'heart' as well as the 'head'. The emotional commitment as well as the logical and rational commitment of staff is vital. However, in leading and managing staff it is important that strategic leaders are mindful of the organisational and political landscape. The importance of this section is that if the school is trying

to recruit or develop leadership talent, then it needs a clear strategic framework in which to deploy that talent so that the people and the strategy are at one level aligned and at another level the individuals are empowered to deliver the strategy.

### Reflection on strategy

1. List the four or five major strategic objectives that your school has agreed for the next 3–5 years.
2. Do all staff have a clear understanding of where the school is going and how they can contribute to that journey?
3. Do you have a clear idea of what talent you need to recruit and/or develop to enable the school to attain its strategic objectives?

## Defining and developing values in school

Defining values is a process that must move beyond the rhetoric of statements on the school sign and on school websites to values that can be witnessed in terms of how leaders act and involve others in the school and wider community. Individuals most often judge a school by the people they meet in terms of the staff and the students. How these staff and students act and talk about their school and express pride in what they are doing, while working or studying there, is critical if values are to be transmitted in authentic and meaningful ways. Very often, we see new principals introduce an education which is 'values based' in rhetoric, something that is simply a slick package. It does not move beyond the paper to a deeper reality of sharing, concern and aspiration for all those involved in the school. Values can and should be challenging and be focused on what is best for all the students in the school community and the adults who nurture and guide them. Values should be seen in action.

Strategy can be considered to be what the school does, while values are more concerned with the how and why a school does what it does. Clearly, schools need a vision of what they are trying to do and how they are going to achieve it, and why that particular vision is important will articulate the school's values. It is important to embed the values of the school within a vision of its future. The importance of having a clear vision is seen by Nanus (1992: 16–18) who articulates the advantage of having a vision for the organisation:

- > the right vision attracts commitment and energises people

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- the right vision creates meaning in people's lives
- the right vision establishes a standard of excellence
- the right vision bridges the present and the future.

However, it is of little purpose if the vision is not translated into a value set which impacts on everyday actions and behaviours. One of the most inspiring and gifted educationalists is Terry Deal, and his book with Ken Peterson (1999: 26), *Shaping School Culture*, provides excellent definitions of values and beliefs:

*Values are the conscious expressions of what an organisation stands for. Values define a standard of goodness, quality or excellence that undergirds behaviour and decision making, and what people care about. Values are not simply goals or outcomes; values are a deeper sense of what is important. Without an existing commitment, everything is relative; values focus attention and define success.*

*Beliefs are how we comprehend and deal with the world around us. They are 'consciously held, cognitive views about truth and reality' (Ott, 1989: 39). Beliefs originate in group and personal experiences and through reading books and articles. Beliefs are powerful in schools because they represent the core understandings about student capacity (immutable or alterable), teacher responsibility for learning (little or lot), expert sources of teacher knowledge (experience, research or intuition), and educational success (will never happen or is achievable).*

It is important for schools to be able to define their values and also ensure that these values guide practice. We look at two examples of values, one from the business sector and one from the education sector.

Reckitt Benckiser Healthcare UK, a major international company, strives to create an organisational culture that is based on four cultural norms or values which are:

### **Insights from practice: Reckitt Benckiser values:**

Entrepreneurship	– 'We allow daring ideas to thrive'
Team Spirit	– 'We work as one, united by common principles and attitudes'
Achievement	– 'We don't just aim high, we always aim to outperform'
Ownership	– 'We take the initiative to do what's needed'

**Figure 2.2** The four cultural norms or values for the Reckitt Benckiser organisation

This example from Reckitt Benckiser provides a clear and unambiguous framework from which to recruit individuals that not only have the technical skills needed for different jobs but also share the core values system of the organisation. This core values system defines what generic 'talents' individuals need to bring to and develop within the company.

In the school sector, one of our research schools articulates its values as:

### **Insights from practice: a school example**

Our central purpose is to provide quality learning experiences through a personalised pupil-centred education. In order to achieve this, we believe that the following values underpin all we do:

- > the needs of the pupils come first
- > everyone in our school community is special and important
- > each of us works to improve on our previous bests
- > learning is active, meaningful and creative
- > we will have high expectations of ourselves and each other
- > we work well in a stimulating learning environment.

At our school, we believe that every pupil will:

- > be successful and confident
- > be self-aware and co-operative
- > have a continuing love of learning
- > be independent and be able to work together
- > be a solution finder
- > be creative.

This value system defines what the school is trying to achieve. Once these values have been established, the school is able to frame the leadership values which develop from them. As well as values for the whole school, it is necessary for the individual leader to act with integrity. This involves the leader looking at their own leadership values and how the leadership talent they seek to develop can share those values.

### **Values and beliefs and the leader**

Building a set of values and beliefs in an organisation will be successful only if the leader is perceived to be acting within a moral framework.

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Kouzes and Posner (1999: 49) argue that 'human beings don't put their hearts into something they don't believe in'. Their research into values puts forward the view that it is the clarity of an individual's values that makes a difference to their level of commitment to the organisation. Where these coincide with the clarity of organisational values, then there is the highest level of commitment. Interestingly, where there were high levels of clarity of personal values but some confusion over organisational values, there were still high levels of commitment, but where clarity of organisational values was not supported by high levels of personal values then commitment was limited. What values or moral characteristics do leaders need to establish the moral culture of the organisation?

Brubaker and Colbe (2005: 176–81) in discussing the components of the moral culture draw on research by Josephson (1990) to outline core values that respondents found desirable in ethical leaders. We will outline each of them in turn.

- Honesty – that colleagues can rely on what you say is the truth.
- Integrity – words and actions are aligned.
- Promise keeping – the ability to deliver on what you agree to do.
- Loyalty – to the organisation you work for and the people who you work with.
- Fairness – you have the same set of expectations from all staff.
- Concern for others – in their working and personal lives.
- Respect for others – respecting their individual differences and diversity.
- Law abiding – operating within the accountability and regulatory frameworks.
- Pursuit of excellence – striving for high achievements by all staff and students.
- Personal accountability – take responsibility, admit mistakes and share success.

The significance of this is that schools need both to define their organisational values and their leadership values. Most importantly, it is necessary to both articulate them clearly and also ensure, through training and the culture of the school, that the values are lived and practised. In terms of talent management, this then enables the school to recruit and develop individuals into the value system of the school. The following exercises are useful tools for the reader to reflect on practice in their own school.



### Reflection on values

- List the key values that your school stands for.
- How often do you reinforce the values in formal or informal situations?
- Does your leadership team discuss the values that underpin the way it operates and interacts with others within the school and wider community?
- Do you share those key values?

How values affect leadership styles is demonstrated in the following leadership examples.

#### Insights from practice: values in action – one school, three leaders

This is a case study undertaken over a 12-year period at one school in England where one leader 'Peter' served as head teacher for three years, he was succeeded by 'Jane' for six years, Pat took over when Jane retired.

##### *Peter as leader*

It is clear that for Peter, targets and SATs results are all-important and he continually forces teachers to adopt shallow learning approaches to enable children to replicate facts in official government tests. He is a very articulate individual and good at promoting himself. He was very successful in persuading the last Ofsted inspection team that the school's test results were a good measure of how good the school was. Staff, while appreciating the importance of the testing regime, are increasingly demoralised by the approaches being advocated by Peter. Achievements are hyped up, especially of the boys' football team where the 'few' team members are singled out for praise whilst the 'many' (including all the girls) receive little attention. Marketing is based on test results and achievements in sport which are both good. Peter is especially good at promoting himself at large publicity meetings but rarely attends the reporting to parents' evenings. In terms of leadership as outlined by Collins (2001), this would equate to level 3 or 4 leadership where the 'I' of leadership is paramount; everything is seen in terms of how it affects the individual leader.

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There are alternative cultures being set up in the school by teachers who seek to protect themselves. One such culture is seen in which staff undertake a number of compliance activities that fulfil the requirements of the head teacher. The other is where they work among themselves in small groups to build learning and teaching cultures that they are confident with and they believe promote 'deep learning' for pupils. The staff feel things are 'done to them' and often feel 'done in' (Novak, 2009) and are increasingly withdrawing into their own classrooms. There is an increasing compliance with the wishes of Peter rather than of a broader professional debate. There is little articulation of the values of the school and of the ethical basis on which individuals relate to each other. Planning is short-term, run by the head teacher alone and focused on one-year targets. Peter writes a one-year school development plan by himself. He has also written the school policies copied from websites. There is no policy for learning. Peter is involved in educational consultancy and has a reputation for not always being in the school. He is not involved in classrooms and does little in the way of mentoring or coaching staff. Some teachers have involved their trade union in complaints against the head teacher. Governors are increasingly at 'loggerheads' with Peter and relationships have deteriorated considerably. However, through the external inspection system, the school is judged to be successful. The values that underpin leadership are sadly lacking and both the staff and the parents don't trust Peter.

### *Jane as leader*

Jane took over the school after considerable previous experience in headship. While recognising the need to deliver short-term results, she believes far more in developing meaningful learning through an integrated curricular approach with highly engaged staff. With a clear personal and professional educational value system, she possesses a quiet determination but is not a natural 'marketer' and does not 'sell' herself at the expense of the staff team or the school. She believes in distributed leadership and seeks to build a learning community of staff and pupils. In terms of Collins' levels of leadership, she could be categorised as a level 5 leader – seeking success for the school and not personalised success for herself. In a sense, this could be characterised as quiet leadership.

By refocusing the school on learning and adopting different learning approaches, she aims to meet short-term targets through the quality of

the children's experience being reflected in their achievements and those demonstrated in the outcome measures. These targets are achieved by reculturing the staff into a high achievement culture which focuses on the individual child's learning needs. Her philosophy is one of working with the staff so that the culture is one of 'done with' rather than 'done to'. She sets out a way of working together based on honesty and integrity as well as transparency as a means of building a professional dialogue within the school.

Although clearly a people person, Jane's main challenge has been to break the school out of a culture of complacency and move it to one of high achievement by challenging performance to achieve excellence. This change has involved a slow process of building professional accountability for children's learning and challenging previous assumptions and attitudes to learning. She has a clear strategic vision for the school and has both the patience and the determination to achieve it. She sees the staff as a totality and teaching, teacher support and administrative staff are all part of the same team, which is a value that underpins the whole culture.

Compared with Peter, she is far more in evidence in the classroom, working with teachers, monitoring standards and involving the leadership team in taking greater responsibilities for colleagues' teaching and learning approaches. She is particularly committed to developing strategic and future plans to run alongside the mandatory short-term school improvement plan. Jane clearly lives the values which the school holds.

### *Pat as leader*

Pat joined the school when it was judged to be 'good with outstanding attributes'. But Pat didn't care about the history of the school, nor did he care about the culture of the school he was joining – he did not take time to reflect on the core values of the school and the way people worked very effectively together. Pat did not want to understand the school through the eyes of the talented staff. The overriding motivation for Pat was to prove himself, at the expense of whoever else. This head teacher is a good example of someone shouting about the rhetoric of values without it affecting the reality of his practice. Pat is unable to recognise the good practice in school and the well-established approach to children's behaviour and learning. On take-up of the post, he immediately introduced a new 'bought in' commercial values approach

*(Continues)*

*(Continued)*

to the curriculum and made a big issue of it outside the school without working with his colleagues for an effective introduction. The approach is articulated through slogans and window dressing but sadly the reality in the school is somewhat different – a school which had values at the heart of its practice is now valueless. For example, on his first staff development day, Pat sent the learning assistants away to ‘get the classrooms ready’ while he did ‘important’ work just with the teaching staff. This sent powerful signals to all staff about support staff not being valued or respected. It was announced that all staff would have the opportunity to talk with him in a professional review. In reality, this was only offered to teaching staff and took the form of an interview rather than the professional dialogue that all staff had previously found motivating and worthwhile. After a year in post, Pat has not observed colleagues in classrooms and does not work alongside them but leads through sending numerous e-mails from his office. Staff have to make appointments to see him which are often in two or three weeks’ time and there is no response to the day-to-day challenges that staff need to share with him. The interests of the children are no longer put first, previously a core value in action. Staff are beginning to work individually and in isolation, something supported by Pat as he is removing all opportunities for joint planning and shared learning. All well-established processes, such as performance review and professional learning, are thrown out, but nothing is put in place to replace them. Staff are increasingly demoralised, demotivated and lack trust in the leadership of the head teacher who they believe is only ‘out for himself’. The latest Ofsted report reflects the deterioration in the effectiveness of the school, judging it to be barely satisfactory. The talented deputy head is also demoralised, and following the head teacher’s derogatory comments about him in the inspection report he too does not trust the head and is frightened to initiate change. It is a clear case of actions by the head teacher which ‘do to’ staff so they feel ‘done in’. A values-based approach to everything in school, not just the curriculum, has to be lived through the interactions between people in the school, through care, honesty, respect and trust. The failure of this leader to show any value through his actions, and his failure to acknowledge collective responsibility but instead to focus on his individual glory, demonstrates the failure to promote any values in action.

## Implications of the leadership examples

While the names of the leaders have been changed, the reality of the examples demonstrates the significance of building longer-term strategic capacity in schools. In terms of Collins' (2001) dimensions of professional will and personal humility, it is clear that one head, Jane, is far more likely to reflect these and put the school on to a successful path that is values-led. Also significant is the people dimension of Jane's leadership style with the involvement of colleagues and building the capacity to work together through sustainable relationships.

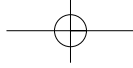
Making judgements about which leader is successful needs to focus on the questions of whose leadership is sustainable and strategic and which leadership is based on deep-seated educational and moral values. Judging failure is framed by a lack of moral compass.

Unless schools can empower and motivate those who work within it with a sense of moral purpose and attainable achievements, the school will simply move from one set of operational targets to another without building a true learning community. Our argument is that before schools and individuals can start thinking about developing a talent-management approach, the core question of 'talent for what?' needs to be answered. In this context, the strategic vision of the school and its value system needs to underpin all its actions.

So our staged approach to talent management is as follows:

1. Define values and strategy.
2. Establish rigorous performance evaluation.
3. Performance management – define and evaluate performance or potential.
4. Develop talent.
5. Establish powerful professional learning.
6. The architecture to support talent development.
7. Create a talent-management culture.
8. Develop school and system talent.
9. Integrate talent management into whole-school processes.

All the other stages depend on the first one being in place before the school can develop its approach. To assess where the reader is in terms of their own organisation, each chapter will have a self-reflection exercise based on the four elements of our leadership model: values, personal qualities, working with others and strategic acumen.



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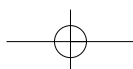
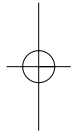
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### Conclusion

This chapter has emphasised that schools clearly need to establish values and strategies as a basis for developing a talent-management approach. The chapter considers that talent management cannot be a bolt-on event, rather it has to be integrated into a staged process. This process should be underpinned by the values held by the leaders, shared and lived by the whole school and reflected in the strategic framework articulated by the school.

### Suggested further reading

- Davies, B. (2011) *Leading the Strategically Focused School*. London: Sage.
- Davies, B. and Davies, B.J. (2009) 'Strategic leadership', in B. Davies (ed.) *Essentials of School Leadership*. London: Sage.
- Davies, B. and Brighouse, T. (2008) *Passionate Leadership*. London: Sage.
- Deal, T. and Peterson, K.D. (1999) *Shaping School Culture*. San Francisco, CA: Jossey-Bass.



## Talent assessment framework: where are you now? Strategy and values

Rate yourself (in partnership discussion) on the following categories.

1 = not at all; 2 = only partially; 3 = to a degree; 4 = very often; 5 = completely

### Values

Are values clearly articulated for the school?	1	2	3	4	5
Do your personal values align with those of the school?	1	2	3	4	5
Are values part of the language and actions of the school?	1	2	3	4	5

### Personal qualities

Leaders have the confidence to articulate strategic vision.	1	2	3	4	5
Leaders take considered risks to achieve objectives.	1	2	3	4	5
Leaders learn from experience.	1	2	3	4	5

### Working with others

Leaders communicate clear strategy and vision.	1	2	3	4	5
Are leaders credible to others in their roles?	1	2	3	4	5
Do leaders both challenge and support colleagues?	1	2	3	4	5

### Strategic acumen

Are leaders able to see the 'big picture'?	1	2	3	4	5
Does the school have a clearly defined strategy?	1	2	3	4	5
Is there intent to identify and develop talent?	1	2	3	4	5

Those items you have rated '1' or '2' would need to be developed while those ranked '4' or '5' need to be celebrated and sustained. Those rated '3' warrant further reflection.

