

**Bringing to the fore Work Life Balance
for Medway Head Teachers**

**A research note reviewing participant perceptions and observations
of a pilot programme in coaching and mentoring for education leaders**

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Summary

This paper reviews community settings, objectives, methods, participant perceptions and outcomes, as available, from a preliminary pilot programme involving 27 school head teachers and deputies in a large urban area in Kent.

Its main finding is that for this group of education leaders a brief programme of coaching and mentoring interventions was perceived as a positive contribution to their personal aspirations for improving balance between work and home lives. As is usual in such programme evaluations, no negative perceptions have been reported. This does mean that negative perceptions haven't been formed: we don't know and if so formed, they haven't been reported.

As the programme has been in operation since November 2005, it remains an objective for further research to evaluate whether there may be longer-term benefits from this intervention. Participants' support for expansion of such programmes, feedback indicates, depends on the programme being established with longer-term commitments from employers.

Objectives

The key objective of the work life balance programme was to offer education managers a resource to manage stress and conflict in their professional and personal lives.

The research objective of this paper is to offer a note of reflection, using evidence submitted as evaluation questionnaires by participants of both the seminar and the coaching programme, as well as observations of the four coaches involved.

Method

This paper is a "research note," using evidence in this pilot programme, which remains subjective and incomplete. The note reviews some of the issues emerging and seeks to offer reflective guidelines on how to increase the effectiveness of coaching interventions for school leaders.

Community setting

Medway's 120-plus primary and secondary schools each have between 2 and 20 key leadership roles: headships, deputy heads, year heads, subject heads and a range of other leadership roles - a thousand individuals or more setting standards and giving guidance over the educational lives of more than 30,000 children.

Enhanced public and political expectations in recent years since the Labour government's ambitious funding of new resources from 1997 have increased pressures on schools, teachers and pupils. Britain's publicly funded schools are traditionally perceived as excellent in parts but failing perhaps as many as half of pupils reaching the age of 16. At that point, there are often pupil histories of low achievement, de-motivation and failure to take from school transferable work skills. Reflecting the urban area's history of closing industries and economic regeneration, Medway's schools in general have performed at average or below average levels in these areas.

However, it is clear that the task of education leaders in this marketplace of contending ideas and critical personal futures of pupils remains both intensely rewarding and arduous. With schools reported annually in published league tables, pupil and school underperformance brings sharp public humiliation and in some cases loss of position for senior managers. Reflecting this increased responsibility and risk; heads' salaries have progressed well in recent years. Yet there remain nationally and regionally major shortages of motivated and qualified younger teachers willing to take on the challenges of headship.

Thus, Medway head teachers face formidable challenges and live high stress careers, as confirmed in private conversations in coaching sessions. In order to provide further resources to enable them to lead and achieve in spite of these pressures, the local authority has sought to provide resources to enable their head teachers to develop and sustain their commitment and achievements.

The Pilot Programme

In 2005 a limited resource was made available to Kent Coaching and Mentoring. Under the leadership of Martin Garwood, an experienced Medway head teacher, education consultant and professional coach a programme was designed and offered to Medway school leaders. Four coaches were used, and an expert on work/life balance led the seminars.

Out of the thousand or more eligible professionals, a total of 27 volunteered to participate. This initial programme comprised a one-day seminar led by a nationally recognised trainer and facilitator, Lisa Spencer-Arnell. The one day session focuses on each participants' own perceptions of their life priorities and stresses, provides reflective and interactive time in a non-judgemental peer setting to bring these pressures into focus and to create tailored and specific action plans to allow participants to make progress on mastering these issues.

The second component of the programme offered six one-to-one coaching/mentoring sessions, either face to face or by telephone. 11 of the initial 27 participants chose to accept these sessions, half of the cost to be covered by the local authority and half by the school.

Why "Work Life Balance"?

Coaching and mentoring as an emergent professional field aims to allow individuals to take control. Many mid-career professionals agree that the pressure to commit to work objectives, particularly in management roles, conflicts with pressures to contribute to home life. Particularly for women managers, these issues of balance are seen as specifically damaging to personal relationships, professional achievement and health. Furthermore, prevailing values suggest that success must consist in being good on all fronts, not only family life or profession. Thus, the issue of balance has resonance for most individual managers and has found to be particularly acute in school leadership roles. Most have their own families. With higher pressure on school pupils to meet national standards of academic achievement, school leaders must face pressures for balance which remain hard to sustain. How do they not only cope with but provide inspiration and leadership in such conditions? "Balance" remains a key concept in pursuing this elusive goal.

Why coaching and mentoring?

Coaching and mentoring in particular are seen as interventions which can be tailored to the individual's specific needs as well as allow them to take control over their own development. By so doing, it is accepted that they will in the long term be able to sustain their responsibilities at a higher pitch than if they were not so supported and therefore increase return on investment for employers' learning and development budgets.

Coaching as a learning tool focuses on the key concept that, if empowered, clients will have within themselves the knowledge and wisdom to choose a course of action, which can lead to improved problem mastery. Other interventions, including retraining, psychotherapy and sabbatical retreats, do not explicitly transfer power to the client. On the contrary they ask the client to surrender control in order to experience the change required to achieve higher functionality in the future. Coaching however starts from the premise that the

key expertise lies from within the client and that intensified self-empowerment forms the core of enhanced achievement and inner satisfaction. A critical value is that the external coach remains non-judgemental about the client's goals, while offering objective and emphatic emotional support. This support can be critical as well as empathetic.

Corporate coaching has gained credibility as an effective development intervention since the mid 1980's, largely in North America and increasingly in UK and Europe. Most published evidence suggests that expenditure on coaching programmes has efficiency 2 to 10 times greater than other forms of human resources development. This is supported by the results of the CIPD study conducted in 2005 outlined in the table below. Thus, within the UK public sector, there is now beginning to be widespread deployment of coaching interventions.

| CIPD 2005 National Survey | Agree |
|---|--------------|
| Coaching can deliver tangible benefits to both individuals and organisations | 99% |
| Coaching is an effective way to promote learning in organisations | 96% |
| Coaching and mentoring are key mechanisms for transferring learning from training courses back into the work place. | 93% |

Mentoring is differentiated by being led by the expertise of the intervener/coach; coaching and mentoring are often used together and professionals try to make explicit when they proffer advice to their clients. In general coaching is client led; mentoring is mentor led.

With increasing pressure on teachers to achieve challenging targets as well as deal with the emotional demands of their work, Head Teachers tend to play a mentoring role to their staff and act as a sounding board to provide the support their staff need. However, like the head of a business, being at the top means that the support they provide to their staff is not as easily as accessible to them.

There can also be an unreasonable perception of Head Teachers needing to be self-reliant as a reflection of their capacity for leadership. Furthermore many Heads may not feel justified using school budgets for their own support and ongoing development.

The Work Life Balance Programme

The One Day Seminar

The content of the WLB day consists of four sessions on the following themes:

1. The Concept of Work life Balance
 - Defining work/life balance
 - Review of its impact on business and individuals
 - Explore popular misconceptions

2. Ideal Work Life Balance
 - Participants explore what constitutes an ideal balanced week for them

3. Current Work/Life Balance
 - Participants review current balance and compare with ideal week
 - Personal motivators and de-motivators
 - Beliefs that create and sustain habitual behaviours

4. The Work Life Balance and Health Connection
 - Impact of stress on well-being
 - Review areas in which to make some changes

5. Creation of Action Plan
 - Balanced goal setting to move from current work/life balance to ideal
 - Explore potential obstacles
 - Explore support system
 - Importance of adjusting work life balance over time

It is important that although the sessions are conducted in a group setting involving 10 or more peers, there is no obligation to discuss in public or to share any personal analyses which are carried out as part of the day. However, participants are encouraged to share issues concerning them in such a way that

they remain comfortable in the sessions. At the end of the session, the participants will have a personal and practicable action plan to help them to move towards a more fulfilling and sustainable balance.

The Medway Programme offered the one-day seminar on two separate days during November 2005, with only primary school heads and deputy heads choosing to accept the invitation to attend the programme. There is no evidence concerning reasons why the offer was not attractive to secondary schools; however, it is speculated that secondary schools have larger discretionary budgets for staff development. If a coaching intervention was seen to be desirable, a school head could opt to purchase such interventions and could therefore decline LEA participation.

In any case feedback indicates that 27 teachers participating in the one day seminars were clear that it created an important personal "space" for them. Some felt enabled to focus on opportunities and problems in their personal lives, without feeling invalidated and in so doing supported by the employer. Some participants felt for the first time in the context of an LEA-sponsored programme provided from outside sources, they could acknowledge and express to themselves and to one another issues they face in balancing work and home issues.

Moreover, each of these school leaders felt empowered to voice their concerns in managing these problems. All must deal with the stresses of falling school enrolments, teacher vacancies, financial constraints, family dysfunction and in some cases environmental shortcomings in the school's localities. The WLB workshop setting, while established by the employer, encouraged senior management staff to acknowledge in one another's presence their shared and similar ongoing problems attempting to balance personal and work priorities. From feedback, it's clear this was perceived as an empowering aspect of the workshops.

The One Day Seminar: Evaluation

As previously stated, twenty-seven headteachers took part in the two workshops. Given the pre-Christmas timing, this was a good take-up and the evaluations underlined just how timely and valued the sessions were. One Head commented:

"The day was full of pertinent insights into the causes of stress and practical strategies for dealing with them, all delivered with enthusiasm and humour. I have finished with renewed resolve and commitment ...[this course]., will change the way I think and act."

For many, the chance to reflect on core values and review their priorities against them was the key to making small but transformational changes to their personal and professional lives. The decision to step back from the flood of work by attending for the day was in its own right a key first step for all in addressing balance. The second was in turning discussion into action.

One-to-One Coaching Sessions

Following the workshops, a small group of heads took up the offer of six one-to-one coaching sessions, either phone based or face-to-face. The aim of the sessions was to provide the opportunity to integrate the learning from the workshop back into school and to help the head teachers implement and sustain the action plan they had developed.

The one-to-one coaching sessions: Client evaluation

Kirkpatrick's standard model for evaluation was utilised to review the feedback from the participants:

| Level | Measurement |
|-------------|--|
| 1 Reaction | Initial reaction to the coaching programme. |
| 2 Learning | Review of particular benefits and learning acquired |
| 3 Behaviour | Review of how benefits and learning have affected behaviour. |
| 4 Results | Long-term benefits to participants and schools. [Q1 2007] |

Of the 11 who opted for one-to-one coaching, 4 evaluation questionnaires available at the time of writing have been analysed. Further questionnaires from these 12 colleagues are being requested some months following the intervention, for purpose of comparison.

Level 1 – Initial Reaction to the Coaching Programme

Testimonial

"The one day Work Life Balance workshop followed by six individual sessions enabled me to clarify my thoughts, prioritise what most mattered and plan realistic, healthy targets. Work no longer controls my life."

Results of Beneficial Index

3 out of 4 awarded maximum points to the beneficial index; the fourth client gave 6 out of 7 points.

Unhelpful components identified:

Direct Quotes

- "target settings; (would prefer) an open forum"
- "Nothing unhelpful although I was aware that on occasion I was going down routes that were too sensitive!"

Level 2 – Review of Benefits and Learning Acquired

Participants were asked to provide any specific benefits they may have gained and the most valuable aspects of the coaching programme.

Testimonial

"I found the coaching sessions very helpful. They provided a stimulus for developing more effective ways of working and helped in clarifying my thinking about my current working practices and the ways in which I want or need to develop."

Key Themes Identified

- Coaching is unique intervention for tailoring development to specific needs
- Objectivity – external coaches enabled objectivity, openness and fresh perspectives

Quotes Include:

- "time to talk about issues for which there is no other forum"
- "the opportunity to talk about work/life balance with someone unconnected with school or the local authority"
- "relationship with coach/mentor. The time allocation provided motivating without pressure. Non-judgemental."
- "time for own agenda rather than someone else's"
- "opportunity to take time and have a professional dialogue"
- "opportunity for personal reflection"

Level 3 Behaviour - Review of how benefits and learning have affected behaviour.**Testimonial**

"Discussions were thought provoking and led me to examine and review routines and working habits which had become inefficient or disorganized. Undertaking a series of sessions meant that there were opportunities to follow through on ideas and gave an incentive to try out plans between sessions."

"I feel that I am working more productively now and am establishing more productive and sustainable ways of working."

Key Themes Identified

- Change - the value of investing time to reviewing working practices and obstacles objectively to identify the changes which need to be made.
- Control - the importance of regularly setting aside time slots to review progress and plan objectives to feel more in control.
- Focusing on self-development enables individual to have more capacity to provide more support to staff.

Quotes Include:

- *"knowing that the next session was booked in helped me to focus on the changes I was hoping to implement to improve work life balance"*
- *"In preparing for the sessions I had to set aside time to reflect on current working practices and the obstacles in the way of working more effectively, as well as what works well. There is not usually the time or the opportunity to this in a focused way. The sessions provided stimulus for development."*
- *"specific time set aside which allowed me to share thoughts/plans with an outside agency."*
- *"Gave me time to clarify ideas at more than a superficial level."*
- *"In discussing my ways of working and attitude to work with someone who was informed but independent I had to crystallize my ideas and articulate my thoughts clearly. I was aware that there was a series of sessions and therefore had the impetus to move on between sessions."*

Client Evaluation - Areas for Taking Coaching Forward

Testimonial

"I think the self reflection and support I have gained from coaching should be in place for headteachers as a matter of course!"

Key Themes Identified

- Wider context of coaching as a development intervention for Head Teachers
- Follow up sessions to review progress are encourage long term development
- Benefits of LEA funding to protect school budgets
- Offering coaching to wider teaching profession

Quotes Include:

- *"maybe offer coaching training for deputy headteachers"*
- *"future coaching sessions for me will be based on areas of my professional development that I would like help with"*
- *"Possible further sessions spread over a longer period of time."*
- *"Consideration of a Staff Development Day [involving all teachers] and perhaps some workshops with pupils."*
- *"It might be useful to have 'top up' sessions at intervals to maintain the focus. It might also be useful to involve senior managers."*
- *"appreciated the opportunity and involvement of Medway LEA in part funding"*

Analyses

1. Qualitative Benefits

This small collection of evaluation forms allows the hypothesis that coaching is received as a novel and unique benefit by these education managers. The context of school operations must remain centered on children's well being, prioritised over staff and managers. This necessary imbalance can be put right in a coaching-centred non-judgemental coaching programme for staff.

In a world where success is perhaps too often sought in terms of numbers and performance indicators the benefits of the programme to the headteachers is not so readily measured but early feedback suggests that all have indeed benefited and the gains are many:

- an enhanced work/life balance
- better management of work load
- improved motivation levels
- raised self esteem
- greater clarity and sense of purpose
- better time management

2. Professional Coaches v Education Specialists

For all the Head Teachers involved this was a first experience of coaching (coaching as opposed to mentoring remains relatively unknown in schools) but all soon settled into the confidential, "client led" structures. The novelty of talking around important professional issues in an entirely confidential setting away from the LEA and governors was the most striking benefit of the programme for the headteachers, giving them valuable space to problem solve and re-centre themselves. For this to work, confidentiality and dedicated time slots are vital. In the one case where the coaching proved less successful it was clear that the commitment to uninterrupted time (45 to 60 minutes) was being compromised. Some initial doubts about working with coaches from outside the world of

schools were soon dispelled once the sessions were underway and the nature of the coaching process was experienced: findings that echo those of the NCSL-

"There was a strong consensus that coaches require expert skills rather than profound educational knowledge. Indeed, coaches from outside education can offer valuable, generic coaching skills to headteachers"

(New Approaches to Leadership Development, NCSL, 2005)

3. Effectiveness of investment compared to other Human Resource Development options

It is clear that assisting education leaders in balancing their lives and sustaining their commitment to their posts is a critical component in advancing improvements in education. Therefore, staff development to retain and enhance skills and wisdom is essential. For coaching-centred WorkLife Balance programmes, the cost per individual participant is competitive, when compared with other staff development interventions, including qualification programmes away from LEA, various psychological and cognitive therapies and medical leave due to stress.

Next Steps

In order to support Head Teachers' work/life balance and help to ensure coaching interventions meet their specific personal development needs, Kent Coaching and Mentoring have agreed on the following next steps:

Half-Day Workshops

Since only 27 of over a 1000 eligible professionals attended, an informal survey was conducted, which confirmed that many were ironically too busy to attend, but would otherwise have wanted to participate. KentCM have therefore condensed the seminar to be delivered as a half-day workshop, which has been successfully delivered as an inset day personal development intervention.

Personal Development Evenings with Kent CM

Since it is clear from this study that more general personal development coaching can also be of benefit to Head Teachers, Kent Coaching and Mentoring has set up the Kent Coaching Exchange. This is a regular monthly meeting open to all with an interest in Coaching and Personal Development. Head Teachers have the chance to meet professional coaches to discuss how they can address the work/life balance and personal development for both their staff and themselves and even arrange a complimentary coaching session so they can experience the benefits of coaching first hand.

Tailored and Modular Coaching Programmes

In order to address the specific development requirements of Head Teachers, Kent CM have devised a modular coaching programme format that can be individually tailored to support education professionals achieve their personal development and career goals.

Level 4 Evaluation – Long Term Results

An informal evaluation will be conducted in Q1 2007 to ascertain the extent to which the learning from this pilot programme has been integrated into working life and the effects it may have had on participants approach to work/life balance, attitude to their commitments and performance.

[November 2006] Medway LA has made available further financial support for individual coaching for its Headteachers. KentCM will continue to collect feedback to develop this reseatch.

Conclusion

It is a conundrum that those at the heart of learning in schools are often least able, from pressure of work, to make adequate plans for their own learning. It is also the case that when work pressures are at their highest the ability to stand back, review priorities and refine the way ahead is one of the first things to be compromised. And pressure on school leaders is undoubtedly high, and having a negative impact via absences, poor work/life balance and the shortage of candidates for top posts.

In order to address this in Medway, senior local education advisers were keen to find a way to support school leaders through a particularly tough period of change, and after discussions with headteachers and representatives from Kent Coaching and Mentoring, a unique project was put together. The programme, which rolled out in November 2005, had two linked parts - a full day accredited Work-Life Balance workshop, and an optional, part-funded programme of 6 follow on coaching sessions undertaken by a small group of qualified life coaches from Kent Coaching and Mentoring,

One thing is very clear, there is enormous potential for coaching within education - for heads, for leadership teams, for staff, parents and pupils too. The College of School Leadership recognises this. It recently published a highly readable and positive report, promoting the role of coaching in school change management processes. Entitled "Leading Coaching in Schools" the key focus of the report can be summed up in one of the sections - "How can we infuse schools with coaching conversations?"

It is too early yet to know the full impact of the programme and how it will be sustained. There is no doubt that with school finances under pressure, the availability of some LEA funding was important in encouraging take-up, but the strength of feedback also suggests that the programme was highly effective in enhancing the work of the school leaders involved and beginning this important "coaching conversation".

Building on this success will depend crucially on how the coaching message can be promoted widely amongst school leaders, and how more can be encouraged to give themselves permission to invest both time and money in self care. Yet, if they do not take their own well-being seriously their role in looking after the nations' learners will be seriously compromised by increasing pressure and workloads. This small pilot study confirmed that coaching has a key role to play here and echoes the view of the NCSL:

"...the second component is coaching, which is probably the most powerful learning strategy for developing leadership potential. Coaching is THE essential learning relationship....."

(Building leadership capacity - helping leaders learn, NCSL, 2005)

Author's note: Following my initial draft of this note, it has been reviewed and in parts repeatedly redrafted by colleagues of the Kent Coaching and Mentoring coaching team. I'm grateful to Martin Garwood, Sue Roberts, and Tim Wallis for their numerous suggestions and improvements. GL

References:

Chartered Institute of Personnel and Development 2004 and following; CIPD offers a rich web resource for coaching and mentoring. See:

<http://www.cipd.co.uk/subjects/lrnanddev/coachmntor/>

Work Foundation 2002 *Coaching as a Key Management Development Intervention*. London: Work Foundation.

<http://www.theworkfoundation.com/leadership/consultancy.aspx>

International J. of Evidence-Based Coaching and Mentoring, an electronic journal edited by Dr E Cox and an international editorial board supported by staff of the Oxford Brookes University's Post-Graduate Programme in Coaching and Mentoring in the Institute of Education, has free online access to the first three of its issues. It offers at the moment 18 papers on emergent theory and best practice in the Coaching and Mentoring fields. Go to: <http://www.brookes.ac.uk/schools/education/ijebcm/home.html!>

Donald Kirkpatrick, "Techniques for Evaluating Training Programmes"
Training and Development Journal 1979

Institute of Education: University of London.

http://ioewebserver.ioe.ac.uk/ioe/cms/get.asp?cid=480&480_0=8304

Coaching and mentoring is now widely used in the education sector. See above website. The seminar detailed below indicates the kind of commitment now found. Wednesday 11 October 2006

Mentoring & Coaching Seminar

How they can enhance and realise the learning potential of pupils as well as staff

International Network for School Improvement

10.00- 12.30 (registration from 09.30) Committee Room 2 (Level 4)

Barrie Joy, Head of Mentoring & Coaching is responsible for developing and managing mentoring and coaching programmes of the London Centre for Leadership in Learning

The aim of the seminar is to give a brief overview of the development of mentoring-coaching in education and to discuss with Barrie Joy recent research he has carried out in the field of mentoring and coaching and some emerging outcomes. He will also consider the implications for developing mentoring-coaching cultures that support pupils as well as staff learning in schools.

The College of School Leadership

Report: "Leading Coaching in Schools"