



1. INTRODUCTION

- a. Established in 1979 to perpetuate the legacy of Sir Robert Menzies, the Menzies Foundation is a non-political, not-for-profit philanthropic foundation which supports leadership initiatives which have the capacity to make catalytic change to improve Australia's future. The Foundation has three priority areas: entrepreneurship in science, leadership in schools and supporting Australia's response to complex global legal issues.
- b. The Foundation's School Leadership initiative is the Menzies School Leader Fellowship program.
- c. The Menzies School Leader Fellowship is an award open to school leaders (**Principal and Assistant Principal**) and **Lead Teachers** at all Victorian schools (government, Catholic and independent) in 2019. In future years, this award may be available for Australia wide applicants.
- d. In 2019 four (4) school leaders and/or Lead Teachers will be awarded a Menzies School Leader Fellowship valued at \$100,000 over three years (\$33,333/year)
- e. The award is a key initiative of the Menzies Foundation, in partnership with the Melbourne Graduate School of Education (MGSE), University of Melbourne (UoM). (referred to jointly and severally as the Menzies Foundation Group (MFFG)).

2. MENZIES SCHOOL LEADER FELLOWSHIP AIMS

- a. The aims of the program are to:
 - i. INDIVIDUAL
 1. Acknowledge outstanding school leaders and enable pathways to further develop their leadership capacity
 - ii. SCHOOL
 1. Support Fellows to scale and/or pilot 'collective efficacy' projects (CEP's) in each Fellow's school to improve student learning outcomes
 - iii. SYSTEM
 1. Share learnings from the 'collective efficacy' projects with other schools and the education system more broadly
 2. In partnership with the cohort of Fellows and the Melbourne Graduate School of Education explore the leadership profile of current school leaders, identify opportunities for leadership development and develop and implement a School Leadership Development program for the Fellows
 3. Share these insights with the education system to encourage the development of an education leadership pipeline which is adaptive and focused on improving student learning outcomes.

3. GUIDELINES

- a. The purpose of these guidelines is to provide information in regard to the Fellowship Program, the application process, the Fellowship selection criteria and responses to Frequently Asked Questions.

4. ELIGIBILITY

- a. To be eligible to apply for a Menzies School Leader Fellowship you must be:
 - i. A school leader including:
 1. A Principal or
 2. An Assistant Principal or
 3. A Lead Teacher and
 - ii. An Australian citizen and
 - iii. A Victorian Institute of Teaching registered teacher at a government, Catholic and/or independent School in Victoria.
- b. For each eligible category of school leader the following definitions apply:
 - i. Principal: is responsible for:
 1. The delivery of a comprehensive curriculum
 2. A community through governance of a school council
 3. The management of financial and human resources
 - ii. Assistant Principal: has primarily responsible for:
 1. The management of significant areas or functions within the school
 2. Making significant decisions relating to the program, budget and staff relating to their area of designated responsibility within the framework of the school's strategic plan, policies and budget
 3. Contributing to the overall management of the school through involvement in policy formulation and decision making
 - iii. Lead Teacher: has responsibility for:
 1. Implementation of one or more priorities contained in the school strategic plan
 2. Coordinating a number of staff to achieve improvements in teaching and learning with a focus on the introduction of changes in methods and approaches to teaching and learning
 3. A significant area or function within the school to ensure the effective development, provision and evaluation of the school's education program.

5. ABOUT THE FELLOWSHIP

- a. Four (4) outstanding school leaders will be selected annually to receive a Menzies School Leader Fellowship.
- b. Each Fellowship will be for three years.
- c. The Menzies School Leader Fellowship is valued at \$100,000 and comprises:
 - i. **Membership of the University of Melbourne Network of Schools (UoM Network of Schools)** for each Fellow's school. (\$15,333/year for three years) (see Section 6)
 - ii. A **'Collective Efficacy' Pilot Project (CEP)** – \$30,000 over the three years to be used to support the implementation and evaluation of the CEP pilot which each

Fellow has developed as part of the Fellowship Application process (see Section 7 & 8).

- iii. **Professional Development** \$15,000 over the three years to be used to support an individualised professional development program for each Fellow
- iv. **Travel grant** for a total of \$9,000 over three years for each Fellow to undertake study trips and attend the UOM Network of School's workshops
- v. **Menzies School Leader Fellowship Program** – participation in a three-year leadership development program for 21st century school leaders delivered in partnership with the Menzies Leadership Coach and the Graduate School of Education, University of Melbourne.
- vi. **Alumni Membership** of the:
 - 1. Menzies Alumni, a cohort of 220 exceptional Australians who have received Menzies Scholarships
 - 2. UOM Network of Schools Alumni, a network of over 100 schools supporting collaborative partnerships and excellence in education, including access to on-line professional learning modules.

6. UoM NETWORK OF SCHOOLS

- a. Is a collaborative partnership between the Melbourne Graduate School of Education at the University of Melbourne and a cohort of 20 schools which is focused on enhancing teaching and learning outcomes with an emphasis on mastery and peer to peer learning networks. Each cohort runs over three years and includes:
 - i. Learning from a globally recognised researchers including Professor John Hattie, Associate Professor Sandra Milligan and Emeritus Professor Stephen Dinham
 - ii. Access to research-based pathways on collective efficacy and student capability attainment
 - iii. A whole of school professional learning program and strategy including:
 - 1. The development of a bespoke learning platform for each school member of the cohort
 - 2. The participation of up to four School Leadership team members in conference and workshops with leading researchers and education experts at the Graduate School of Education, University of Melbourne
 - 3. Online professional learning modules for all school staff to:
 - a. Develop dashboard and other resources that focus on the use of school data
 - b. Develop collaborative processes to support student learning
 - c. Develop regular monitoring of all student achievement
 - d. Generate and share school-based solutions based on internal and external research
 - e. Evaluate all school-based implementations and outcomes
 - f. Collaborate with teaching and learning leaders to provide professional development on high impact instructional strategies
 - g. Work with teachers to develop an evaluation of interventions
 - h. Support data collection and interpretation of evidence.

7. WHAT IS COLLECTIVE EFFICACY (CE)?

- a. In 2009 Professor John Hattie published *Visible Learning: A Synthesis of Over 800 Meta-Analyses Relating to Achievement*, which synthesized the findings from 800 meta-analysis of 50,000 research studies involving more than 150 million students to clarify what factors are most important in improving student learning outcomes.
- b. Professor Hattie's latest dataset synthesizes 1,500 meta-analyses of 90,000 studies involving more than 300 million students. This is the world's largest evidence base into what works best in schools to improve learning.
- c. Professor Hattie has identified that one of the most important critical factors is Leadership – specifically in regard to **collective teacher efficacy**.
- d. Collective Teacher Efficacy is the collective belief of teachers in their ability to positively affect students. Recent research on collective teacher efficacy (see Donohoo, Hattie & Ells, 2018) suggests that school leaders who facilitate collaboration to establish and maintain **effective teams** that work together to enhance student achievement is a critical factor in dramatically improving student outcomes.
- e. Developing collective teacher efficacy in schools requires a suite of leadership attributes including fostering creativity and innovation, managing complexity, team building and promoting teamwork, creating lasting relationships, learning agility and having a vision for the future.
- f. In summary:

“Building collective teacher efficacy – by providing teachers with opportunities to build instructional knowledge and collaborate with colleagues, with feedback that is insightful and with a vision of success in which teachers are treated as sources of expertise – will allow leaders to transform their schools into organisations with strong collective efficacy and improved student performance.”

Issue Brief, the Centre for Comprehensive School Reform and Improvement – Building Collective Efficacy: How Leaders Inspire Teachers to Achieve”

8. COLLECTIVE EFFICACY PROJECT (CEP)

- a. The Menzies School Leader Fellowship Program and UoM Network of Schools will build the capacity of the Fellow and their respective School Leadership teams to implement an evidence-based, strategic ‘collective efficacy’ project that aims to improve student learning outcomes through:
 - i. Three-year project funding to support the delivery of a strategic ‘collective efficacy’ project which aims to improve student learning outcomes at the Fellow’s school (\$30,000 over three years)
 - ii. Membership of the UoM Network of Schools and the Collective Efficacy research group which specifically focuses on building collective efficacy. This steam will include researching and implementing initiatives that enhance student learning outcomes.
 - iii. Support from the Melbourne Graduate School of Education, University of Melbourne, to finalise each Fellow’s CEP project plan and evaluation framework to track progress and inform next steps.
- b. The CEP may:
 - i. support scaling an existing initiative that is having a proven impact and/or
 - ii. be a new pilot project

- c. The CEP should:
 - i. Be identified in each of the Fellow's school's broader strategic plan and endorsed by the Principal
 - ii. Respond to a clear need identified through analysis of school-based evidence and data
 - iii. Be designed as a solution to a defined opportunity or challenge in regard to enhancing student learning outcomes and should include:
 - 1. a project plan,
 - 2. proposed activities,
 - 3. a project budget, and
 - 4. an evaluation framework which identifies measures of success and expected outcomes
 - iv. Articulates specific, measurable and achievable changes for improved 'collective efficacy' to support improved student learning outcomes.

9. MENZIES SCHOOL FELLOW LEADERSHIP DEVELOPMENT PROGRAM

- a. The aim of the Leadership Development Program is for Fellows to understand and grow in their adaptive leadership in order to have the greatest impact on collective teacher efficacy and enhanced student learning outcomes; and to build the practices to continue to reflect and grow beyond the program, and take their learnings into their school environment.
- b. In order to make a real step change in student outcomes, leaders need a new, more adaptive way of viewing themselves and their leadership challenges and new ways to view and respond to the complex and challenging factors and barriers at play in the larger 'ecosystem' of stakeholders, including students, teachers, parents, government, institutions and the community that shape learning outcomes. As well as becoming more adaptive, they also need to understand and build their personal resilience and wellbeing. Together, adaptive leadership and wellbeing increase the capacity and capability to see and impact a complex system, and remove the barriers to change.
- c. The program aims to understand and grow the Fellow's adaptive leadership and wellbeing through insight and awareness of their current state. This will then define a leadership challenge relevant to their Collective Efficacy Project, which becomes the means to apply their learning and measure the shifts on their own leadership, on collective efficacy and student outcomes over time.
- d. Design elements of the program include:
 - i. Diagnostic, and debrief, with insight forming the basis of their leadership challenge
 - ii. Face to face learning modules, on self, role and system by leading thinkers in adaptive leadership
 - iii. Peer to peer coaching and collaboration
 - iv. Deep individual work and reflection
 - v. Practical, on the job 'experiments' designed to test and embed leadership practices.

10. SELECTION CRITERIA

a. Applications will be assessed on the following basis:

i. Collective Efficacy Project (CEP)

Selection Criteria	Indicators and Supporting Evidence
Demonstration of an identified need by the school leadership team to grow collective efficacy	<ul style="list-style-type: none"> • What is the strength of 'collective efficacy' in your school? • How do you know? • What do you want to focus on? • Why?
Demonstration of a strong project rationale	<ul style="list-style-type: none"> • What is your project goal? • How will this impact on student learning outcomes? • What changes do you want to achieve? • Why are these changes important? • What will you do? • How will you do it? • Who will benefit from the project?
Demonstration of a readiness for change	<ul style="list-style-type: none"> • Why is it a good time to do this project? • How does it connect to your school's strategic priorities?
Demonstration of effective monitoring and evaluation	<ul style="list-style-type: none"> • How will you evaluate the project? • What data will you collect? • How will you use this data to decide what to do next?
Demonstration of project feasibility	<ul style="list-style-type: none"> • How will the project time be incorporated into your school duties? • What is the time allocation required to complete the project? Weekly/monthly?
Demonstration of project sustainability	<ul style="list-style-type: none"> • How will the positive changes that happen because of the project be sustained and leveraged beyond the three-year period?
Project budget	<ul style="list-style-type: none"> • Complete Application Budget Template

ii. Leadership potential and professional excellence of the applicant

Selection criteria	Indicators and supporting evidence
Your leadership potential	<ul style="list-style-type: none"> • In your view, what type of leader successfully builds CE? • What is the most significant leadership challenge you face in building CE in your school?

	<ul style="list-style-type: none"> • How would you define the personal shift you need to make?
Demonstration of your current approach to your professional development	<ul style="list-style-type: none"> • What are you focusing on now to make this shift? • How will this impact on CE and student outcomes in your school? • What support do you need to be successful? • How do you learn best? Provide an example of growth in your leadership capability and how it came about.
Demonstration of readiness for change	<ul style="list-style-type: none"> • Why do you need to focus on this now? • What will be the impact if you made the shift? • What will be the impact if you don't? • How does this shift connect to your purpose and/or values as a leader in education?
Demonstration of effective monitoring and evaluation	<ul style="list-style-type: none"> • How do you evaluate your leadership now? • How will you evaluate your progress against the personal shift you want to make?
Demonstration of sustainability	<ul style="list-style-type: none"> • How will you build on the positive changes to your leadership?
CV	<ul style="list-style-type: none"> • Upload your CV

11. KEY DATES

- a. Nominations open – Monday 29 October 2018
- b. Nominations close – Friday 21 December 2018
- c. Shortlisted applicants notified – Monday 28 January 2019
- d. Referee checks – last week of January 2019
- e. Shortlisted applicant interviews – Monday 4 – Friday 8 February 2019
- f. Fellowship recipients notified – 11 February 2019
- g. UoM Network of Schools and Fellow Leadership Workshops:
 - i. 3 days in February/March (+ Awards Event)
 - ii. 3 days in May/June 2019
 - iii. 3 days in October/November 2019

12. SELECTION PROCESS

- a. Assessment of applications – the Menzies Foundation will appoint a panel of education and leadership expert external reviewers to review the applications and to create a shortlist of candidates to be interviewed. Applicants will be assessed and scored against the 'collective efficacy' and leadership criteria in the application.
- b. Shortlist interviews – short listed applicants will be invited to attend an interview either in person via videoconference or teleconference. Referees will be contacted for reference checks and appropriate due diligence undertaken, as required.

- c. An Executive Committee of External Reviewers Panel will meet in February 2019 to interview the shortlisted applicants and recommend the appointment of four Fellowship recipients to the Menzies Foundation.
- d. The Menzies Foundation will then select four Fellowship recipients [having regard to the recommendation].
- e. The Fellows will be notified on 11 February 2019 and will be announced shortly thereafter.

13. HOW DO I APPLY?

- a. Applications are to be made online by completing the application form at: www.menziesfoundation.org.au/schoolleaderfellowship
- b. The first step in the application process is to register so that you can login to the application platform. This will enable you to create, save and modify your form before submission. If you have previously registered, please use your existing login/password details. If you have forgotten these details the log in process will prompt you to reset your login and password details.
- c. You can save a draft of your application form at any time and come back to it at any stage until you submit your application. Once your application is submitted no further changes can be made.
- d. Following submission, you will receive an email confirmation acknowledging receipt of your application.
- e. If you have any questions in regard to the Application process, please contact us at the Menzies Foundation on (03) 9070 3468 or at fellowship@menziesfoundation.org.au

14. FELLOWSHIP AGREEMENT

- a. Agreements will be sent to each Fellow and their respective schools in the week commencing 11 February 2019.
- b. The Fellow and their respective school will be required to return the signed funding agreements by the week commencing 18 February 2019.
- c. The Fellowship and school program will commence in Term 1 2019 and run for three years.
- d. Payments:
 - i. UoM Network of Schools:
 - 1. Annual payments on behalf of each Fellow's school will be triggered on the basis of an invoice from the Graduate School of Education, University of Melbourne for the Network of Schools program, signed off by the Principal and forwarded to the Menzies Foundation for payment
 - ii. CEP Project:
 - 1. Stage 1 project funding will be paid following the receipt of the final CEP plan and evaluation framework, endorsed by the Melbourne Graduate School of Education nominee and signed off by the Fellow and School Principal
 - 2. Further project funding payments will be made subject to satisfactory progress reports thereafter
 - iii. Professional development and travel grants:
 - 1. Payments to support each Fellow's professional development and travel grants will be paid following the receipt of the Fellow's Leadership

Development Plan signed off by the Fellow and Menzies School Leader Fellowship Leadership Coach

2. Payments will be triggered on receipt of an invoice from the professional development program provider.
- e. The grants given to the Fellow's respective school will be given by electronic funds transfer. All payments made directly to the Fellow's school are donations and as such, no GST applies.

15. REPORTING

- a. Fellows will be required to provide an annual Leadership Reflection Report and Final Leadership Reflection Report at the conclusion of the Fellowship program.
- b. Fellows will be required to provide an annual CEP project evaluation report, including an annual budget acquittal, and a more comprehensive evaluation report at the end of the three-year funding period. All CEP Reports will be signed off by the Fellow and Principal.

16. FREQUENTLY ASKED QUESTIONS

- a. What is the Menzies Foundation?
 - i. The Menzies Foundation supports leaders who have the capacity to make catalytic changes to improve Australia's future.
 - ii. Established in 1979 to perpetuate the legacy of Sir Robert Menzies, Australia's longest serving Prime Minister, who had a deep and abiding interest in education. The Foundation has a 40-year track record in backing outstanding leaders.
 - iii. The Foundation plays a philanthropic role in supporting the development of leadership capability in three priority areas:
 1. Entrepreneurship in science
 2. Leadership in our schools
 3. Guiding Australia's response to complex global legal issues, with a particular focus on cyber security for the next three years.
- b. What is the Melbourne Graduate School of Education, University of Melbourne?
 - i. The Melbourne Graduate School of Education is ranked number one in Australia and sixth in the world.
 - ii. The Graduate School has seven research centres and three research hubs, is ranked "well above world standard" for all areas of education research and is the only Australian university to receive the highest possible ranking for all research categories in the 2015 Excellence in Research for Australia results.
 - iii. The Research Team supporting the Menzies School Leader Fellows program and the UoM Network of Schools is led by internationally acclaimed Laureate Professor John Hattie whose influential book 'Visible Learning: A synthesis of over 800 meta-analyses relating to achievement' is believed to be the world's largest evidence-based study into factors that improve student learning. Professor Hattie is Director of the Melbourne Education Research Institute at the University of Melbourne and Chair of the Australian Institute for Teaching and School Leadership.
 - iv. Kerry Elliott is Director of the UoM Network of Schools. Kerry's doctorate focuses on performance and development in schools and how teachers develop their practice. Kerry has been a lecturer in Instructional Leadership at the

Melbourne Graduate School of Education since 2016. Kerry is a former school principal and has worked in and across a range of school settings.

- c. Who is the Menzies School Leader Fellowship Leadership Development Coach?
 - i. The inaugural Menzies School Leader Fellowship Leadership Development Coach is Angela Mina. Angela is a leadership consultant and coach.
 - ii. The majority of leaders she works with are senior executive roles and Partners in large corporates and professional service firms, currently including ANZ, Wesfarmers and PwC. She also works with senior leaders in the government, community and education sectors.
 - iii. Angela has undertaken Levels 1-3 of her coaching accreditation with the Institute of Executive Coaching and Leadership and has over 1000 hours of coaching experience.

- d. Who can apply?
 - i. A school leader (Principal, Assistant Principal and/or Lead Teacher and their respective school, based in Victoria.

- e. How do I apply?
 - i. Via the online application form at www.menziesfoundation.org.au/schoolleaderfellowship. Links to the application form on the Menzies Foundation website can also be accessed from the UoM Network of Schools website.

- f. Do I need my School Principal's permission to apply?
 - i. Yes, your School Principal is required to sign off on your school's commitment to joining the UoM Network of School's initiative and undertake the Collective Efficacy Program that is an important part of your application.

- g. What will I and my school receive if I am selected as a Menzies Fellowship recipient?
 - i. The Menzies School Leaders Fellowship is valued at \$100,000 and includes:
 1. **Membership of the University of Melbourne Network of Schools (UoM Network of Schools)** for each Fellow's school. (\$15,000/year for three years)
 2. A '**Collective Efficacy' Pilot Project (CEP)** – \$30,000 over the three years to be used to support the implementation and evaluation of the CEP pilot
 3. **Professional development** - \$15,000 over the three years to be used to support an individualised professional development program for each Fellow
 4. **Travel grant** for a total of \$9,000 over three years to undertake study trips and attend the UoM Network of School's workshops
 5. **Menzies School Fellows Leadership Program** – participation in a three-year leadership development program for 21st century school leaders delivered by the Melbourne Graduate School of Education, University of Melbourne and Angela Mina Consulting
 6. **Alumni Membership** of the:

- a. Menzies Alumni, a cohort of 220 exceptional Australians who have received Menzies Scholarships
 - b. UOM Network of Schools Alumni, a network of over 100 schools supporting collaborative partnerships and excellence in education, including access to on-line professional learning modules.

- h. How can Fellows use the \$15,000 professional development funds and \$9,000 travel grant?
 - i. The Fellows may use \$15,000 professional development funds and \$9,000 travel grant over the three-year period to enhance their leadership capability and professional development. This may include **course fees, conference attendance, leadership coaching, an overseas study tour and/or a research project, study and/or time release.**
 - ii. The Menzies School Fellowship Leadership Coach will liaise with each Fellow to assist in identifying their choice of professional development opportunities.

- i. What is the 'Collective Efficacy' Project (CPP) and how can the \$30,000 over three years be spent?
 - i. Each Fellow's school will receive \$30,000 to support the Collective Efficacy Project designed to improve student learning outcomes that was outlined in the Fellowship application.
 - ii. This project should be evidence-based and focused on building collective efficacy at your school to improve student learning outcomes with long-term measurable benefits.
 - iii. Each project plan should include an evaluation framework to monitor progress and inform the strategic aim of the project.
 - iv. The funds may be used to extend an existing initiative that is having a proven impact or a new project.
 - v. The UoM Network of School will work liaise with the Fellow and their respective schools to finalise the project design and evaluation framework for each school project.

- j. What is the time commitment required to undertake the Fellowship?
 - i. Please note that the Fellowship will require sufficient time allocation to ensure that Fellow's receive the maximum benefit from the Fellowship. This includes:
 - 1. Strategic development, implementation and evaluation of the CEP
 - 2. Attendance at UoM Network of School and Leadership Workshops and Conferences over the three-year period (x3 times/year)
 - 3. Leadership development coaching
 - 4. Professional Development program

- k. What will the Assessment Panel look for in an application?
 - i. The written information provided in your application form is the main factor in selecting shortlisted finalists. You should check Section 10 of these guidelines for questions relevant to each of the selection criteria.

- l. Who will be selecting the Fellowship recipients?
 - i. Four Fellows will be selected from a shortlist of candidates by a panel of senior education and leadership experts. The Selection Panel will be published on the Menzies Foundation website at www.menziesfoundation.org.au in due course.

- m. When will I be notified?
 - i. All applicants will be notified on the status of their applications as unsuccessful or shortlisted at the end of January 2019. Shortlisted applicants must be available for an interview between 4–8 February 2019. The Fellowship recipients will be notified if they have been successful on 11 February 2019 and awarded the Fellowship at the Fellows & UoM Network of Schools workshop to be held in February/March 2019. A full list of the 2019 Menzies School Leader Fellows will be published on the Menzies Foundation website in the second week of February 2019.

- n. What are the key dates?
 - i. Nominations open – Monday 29 October 2018
 - ii. Nominations close – Friday 21 December 2018
 - iii. Shortlisted applicants notified – Monday 28 January 2019
 - iv. Referee checks – last week of January 2019
 - v. Shortlisted applicant interviews – Monday 4 – Friday 8 February 2019
 - vi. Fellowship recipients notified – 11 February 2019
 - vii. Fellowship & UoM Network of Schools Workshops:
 - 1. 3 days in February/March (+ Awards Event)
 - 2. 3 days in May/June 2019
 - 3. 3 days in October/November 2019

- o. Can I submit a late application?
 - i. The online application will close at 5.00pm (AEST) on Friday 21 December 2018. No late applications will be excepted via any means after this time.

- p. What happens if I am the Menzies School Leader Fellow and I leave my school during the three years of the Fellowship program?
 - i. Our expectation is that successful Menzies School Leader Fellows anticipate that they will stay at their school to lead the Collective Efficacy project and participate in the UoM Network of Schools for the three years.
 - ii. We acknowledge, that from time to time school leaders will move on to take advantage of new opportunities. In this instance, the Menzies Fellow will continue to take part in the Menzies School Leadership Program and the sponsoring school will continue to participate in the UoM Network of Schools and assume responsibility for the CEP.