



**Menzies Foundation
Menzies School Leader Fellowship
GUIDELINES and TERMS & CONDITIONS**

The Menzies School Leader Fellowship Guidelines and Terms & Conditions Document will be signed by the Fellow and their respective school prior to the commencement of the program.

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. In 2020 Four (4) school leaders will be awarded a Menzies School Leader Fellowship valued at \$150,000 over 2 years.
- d. In 2020 one (1) school leader will be awarded a Collier School Leader Fellowship valued at \$150,000 over 2 years, funded by the Collier Charitable Fund.
- e. The award is a key initiative of the Menzies Foundation.

2. MENZIES SCHOOL LEADER FELLOWSHIP AIMS

- a. The aims of the program are:
 - 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 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 teacher at a government, Catholic and/or independent School in Australia currently registered with the relevant governing body in your home state or territory
- 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. Each Fellowship will be for two years.
- b. The Menzies School Leader Fellowship is valued at \$150,000 and comprises:
 - i. A '**Collective Efficacy' Pilot Project (CEP)** – \$30,000 over the two years to be used to support the development, implementation and evaluation of a Collective Efficacy Project. (see Section 6 & 7).
 - ii. **Professional Development** for a total of \$15,000 over the two years to be used to support an individualised professional development program for each Fellow, developed in consultation with each Fellow's Leadership Coach.

- iii. **Travel grant** for a total of \$10,000 over two years for each Fellow to undertake study trips, attend workshops or secure time release as required, developed in consultation with each Fellow’s Leadership Coach.
- iv. **Menzies School Leader Fellowship Program** (\$95,000)– participation in a 2-year leadership development program.
- v. **Alumni Membership** of the Menzies Alumni, a cohort of 250 exceptional Australians who have received Menzies Scholarships

6. 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”

7. COLLECTIVE EFFICACY PROJECT (CEP)

- a. The Menzies School Leader Fellowship Program 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. Two-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 2 years)
 - ii. Support to finalise each Fellow’s CEP project plan and evaluation framework to track progress and inform next steps.
- b. The CEP should:

- i. Be identified in each of the Fellow's School broader strategic CEP 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.
- c. The CEP may:
 - 1. support scaling an existing initiative that is having a proven impact and/or
 - 2. be a new pilot project

8. 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.

9. SELECTION CRITERIA

a. Applications will be assessed on the following basis:

Selection Criteria (SC)	Indicators and Supporting Evidence
1. Demonstration of your leadership skills (in leading learning and teaching).	i. Provide evidence of your skills in leading learning and teaching in the complex and challenging environment of a school.
2. As part of the fellowship program you would need to develop a proposal and plans for a collective efficacy project in your school. Provide examples of your approach to building collective efficacy.	i. In your view, what type of leader successfully builds collective efficacy? ii. What is the strength of 'collective efficacy' in your school? iii. What is the most significant leadership challenge you face in building collective efficacy in your school? How would you address this?
3. Demonstration of understanding and/or experience in building sustained change in teaching and learning which connects to a broader vision for the future.	i. What are the critical components you need to consider? How would you do it? ii. Who would benefit?
4. Demonstration of approach to ensuring stakeholder commitment and engagement to a project during implementation and beyond.	i. How will you work with stakeholders to ensure, sustain and build on the positive changes that would happen because of the project beyond the 2-year period?
5. Demonstration of your approach to your development as an educational leader.	i. How would you define the personal shift you need to make? ii. What are you focusing on now to make this shift? iii. How does this shift connect to your purpose and/or values as a leader in education? iv. What support do you need to be successful? v. Provide an example of growth in your leadership capability and how it came about.

10. KEY DATES

- a. Applications Open – September 2020
- b. Applications Close – TBA
- c. Shortlisted Applicants Notified – TBA
- d. Referee Checks – April/May 2020
- e. Shortlisted Applicants Interviews – TBA
- f. Fellowship Recipients Notified – TBA

11. 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 leadership criteria in the application.
- b. Short List 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 to interview the shortlisted applicants and recommend the appointment of five Fellowship recipients to the Menzies Foundation.
- d. The Menzies Foundation will then select five Fellowship recipients [having regard to the recommendation].
- e. The Fellows will be notified in June 2020 and will be announced shortly thereafter.

12. HOW DO I APPLY?

- a. Applications are to be made online by completing the application form at: <https://www.menziesfoundation.org.au/applications-2020>
- 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 natalie.gilbertson@menziesfoundation.org.au

13. FELLOWSHIP PAYMENTS

- a. The Fellowship and School Program will commence in July, 2020 and run for two years.
- b. Payments:
 - i. CEP Project –
 1. Stage 1 project funding will be paid following the receipt of the final CEP plan and evaluation framework, endorsed by the ACER Research Fellow and signed off by the Fellow and School Principal
 2. Further project funding payments will be made subject to satisfactory progress reports thereafter
 - ii. 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.
- c. The grants given the Fellow’s respective Schools will be given by electronic funds transfer. All payments made directly to the Fellow’s school are donations and as such, no GST applies.

14. 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 two year funding period. All CEP Reports will be signed off by the Fellow and Principal

15. FREQUENTLY ASKED QUESTIONS

- a. Who 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. Who is ACER?
 - i. ACER is the Australian Council for Educational Research.
 - ii. ACER has more than 400 staff located in offices around the world.

- iii. The mission of ACER is to create and promote research-based knowledge, products and services that can be used to improve learning across the lifespan
 - iv. The Research Team supporting the Menzies School Leader Fellows program is guided 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.
 - v. The Research Program is lead by Kerry Elliott, a Senior Research Fellow at ACER. Kerry has previously been a lecturer in Instructional Leadership at the Melbourne Graduate School of Education. Kerry is also 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 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 – Australia wide.
- e. How do I apply?
- i. Via the online application form at <https://www.menziesfoundation.org.au/applications-2020> on the Menzies Foundation website.
- f. Do I need my School Principal's or Chair's permission to apply?
- i. Yes, your School Principal or Chair is required to sign off on your school's commitment to the Fellowship Program.
- g. What will I and my school receive if I am selected as a Menzies Fellowship recipient?
- i. The Menzies School Leader Fellowship is valued at \$150,000 and comprises:
 - ii. A '**Collective Efficacy' Pilot Project (CEP)** – \$30,000 over the two years to be used to support the development, implementation and evaluation of a Collective Efficacy Project. (see Section 6 & 7).
 - iii. **Professional Development** for a total of \$15,000 over the two years to be used to support an individualised professional development program for each Fellow, developed in consultation with each Fellow's Leadership Coach.

- iv. **Travel grant** for a total of \$10,000 over two years for each Fellow to undertake study trips, attend workshops or secure time release as required, developed in consultation with each Fellow's Leadership Coach.
 - v. **Menzies School Leader Fellowship Program** (\$95,000)– participation in a 2-year leadership development program for delivered in partnership with the Menzies Leadership Coach, Ernst & Young and ACER.
 - vi. **Alumni Membership** of the Menzies Alumni, a cohort of 250 exceptional Australians who have received Menzies Scholarships
- h. How can Fellows use the \$15,000 professional development funds and \$10,000 travel grant?
- i. The Fellows may use \$15,000 professional development funds and \$10,000 travel grant over the two 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 2 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 Leadership Coach 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. Leadership development coaching
 3. 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. 5 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. Can I submit a late application?
 - i. The online application will close at 5.00pm (AEST) on 19th April 2020. No late applications will be accepted via any means after this time.

- n. What happens if I am the Menzies School Leaders Fellow and I leave my School during the 2 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.
 - 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 assume responsibility for the CEP.

16. TERMS & CONDITIONS

- a. Before the distribution of the Menzies School Leaders Fellowship to successful Fellows, and in order to be eligible to receive the Award, the Fellow and the Fellow's school must sign an agreement from the Menzies Foundation that sets out all conditions for the Award of the Menzies School Leader Fellowship.
- b. By accepting a Fellowship, the Fellow makes the acknowledgements and warranties set out, and accepts and agrees to be bound by these Terms and Conditions.
- c. The Fellow acknowledges and agrees that all information submitted by the Fellow must not, and the Fellow warrants that such information does not, infringe the copyright or other intellectual property rights of any person or organisation.
- d. The Fellow indemnifies the Menzies Foundation against any claim made against for any loss flowing from any authorised use or disclosure of the information during the Fellowship program, including, but not limited to, losses arising from the infringement of the copyright or other intellectual property rights of any person or organisation.
- e. Subject to the Terms and Conditions of this document, Menzies Foundation may hold, use or disclose all or part of the information submitted by the Fellow, with any other Party, but only for purposes related to the Award.
- f. The Fellow grants Menzies Foundation a perpetual, royalty-free, non-exclusive, irrevocable and transferable licence to use or modify (including the right to sub-licence) any information or intellectual property arising from the Fellowship program, in whole or in part, for purposes related to the Award.
- g. Fellows are required to be available to travel to Melbourne for the Fellowship Program Workshops and Awards Ceremony and other workshops as required over the two-year funding period.
- h. The Fellow acknowledges and agrees that all considerations, deliberations and decisions made by the Menzies Foundation in relation to the Fellowships and the Applicant's Form and application generally, including, but not limited to, the award of the Menzies School Leader Fellowship to selected Applicants, are final and not subject to review by any person, and the Menzies Foundation is under no obligation to disclose or communicate to or otherwise discuss with the Applicants, the considerations, deliberations, reasons and decision making of the Menzies Foundation or the Selection Panel.
- i. This document has been prepared, and each Menzies School Leader Fellow will be awarded, without taking into account the objectives, needs, financial and taxation situation (Circumstances) of any particular Fellow, and the consideration of such Circumstances are not a part of the Criteria. Accordingly, the Menzies Foundation and the Fellow acknowledge and agree that the Circumstances of each Fellow may differ, and the Fellow should speak to an independent taxation or financial advisor as to the implications of receiving the Menzies School Leaders Fellowship. Menzies Foundation is

not liable to the Fellow for any financial (including taxation) or other implications which may arise from the Fellow's receipt of the Menzies School Leader Fellowship.

- j. Menzies Foundation may use, disclose and promote, and the Fellows must ensure that their schools acknowledge and agree that Menzies Foundation can use, disclose and promote, information about the Fellow and their school, and share the stories and any other information provided by them at any stage throughout the process contemplated under this document in various Menzies Foundation related material, including, but not limited to, promotional material, general media, online, social media, communication and marketing mediums (Materials)
- k. Each Fellow acknowledges and agrees that all copyright in the Materials vest and are owned by Menzies Foundation and that the Fellow and their school are not entitled to remuneration, royalties, or any other payment in respect to the use of the Materials by the Menzies Foundation.
- l. The Fellows may be required to attend a presentation of the Menzies School Leaders Fellowship at their school to which persons, including, but not limited to local media, public personalities, and members of the Menzies Foundation and will be invited to attend. An appropriate date and time for this presentation will be coordinated with the Fellow, subject to the commercial needs of the Menzies Foundation. Fellows may (at the discretion of the Menzies Foundation) also be required to do press interviews and photography to help promote the Fellowships.
- m. All personal information (as defined in the Privacy Act 1988 (Cth)) (Personal Information) included in the Application Form and collected by the Menzies Foundation and ACER in connection with the Fellowships is collected, and may be used or disclosed for the purposes of (i) assessing Applicants' applications, (ii) awarding Fellowships, (iii) administering, marketing and promoting the Fellowship program, (iv) awarding future Fellowships, (v) conducting research and development relating to the Fellowship Program or other programs of Menzies Foundation, (vi) any reasonably related purposes. Personal Information, will otherwise be collected, used and disclosed by Menzies Foundation in accordance with its privacy policy. These policies can be found respectively at:
- n. Any waiving of the requirements contained in the document (including the Criteria) is at the discretion of the Menzies Foundation.
- o. By applying for the Fellowships, Fellows (i) discharge and release Menzies Foundation from all liabilities or claims of any kind arising from or in connection with the Fellowships, and (ii) indemnify Menzies Foundation from any claims arising from third parties in relations to the Fellow's participation in any stage or aspect of the Fellowships.
- p. To the extent permitted by law, the Menzies Foundation and their related entities and their respective directors, officers, employees and agents, exclude any and all liability for any
 - i. loss or damage, whatsoever, which is suffered or sustained, in connection with (i) any Fellow's participation in the Fellowships, or 9ii)

- ii. the receipt or use of the Fellowship by a Fellow or anyone participating in the use of the Fellowships with the Fellow.
- q. These Terms and Conditions may be modified at any time by Menzies Foundation at their sole discretion by giving notice to the Fellows (as the case requires).
- r. The document and the Fellowships shall be governed by the laws of Victoria and the Menzies Foundation and each Fellow submits to the non-exclusive jurisdiction of the courts of Victoria.