

Headteacher Learning from Case Studies: Lessons learned from two years of Head Cases

By Dr Keven Bartle, SSAT

Context: Rethinking Headship

Two years ago, SSAT conducted secondary and primary research into the experiences of headteachers as part of a piece of work that we called Rethinking Headship. The research evidence pointed to some real challenges around the retention and recruitment of headteachers and, just as importantly, around sustaining the pipeline for future heads.

The follow up primary research we conducted was a survey of 236 serving and former headteachers who, between them, had close to two thousand years of experience in the role. In reference to the fact that our respondents felt a deep affinity for their schools and their role against a backdrop of unsustainable pressures, we called the final report 'Labouring to Love Headship: Overwhelming challenge and underwhelming support'.

Context: Head Cases

One of the responses that SSAT made to our own findings was to create a new programme called Head Cases. The programme utilises realistic case narratives created by a panel of headteachers based on their own experiences and those of their peers. These cases cover the topics of parental complaints, HR difficulties, budgeting and finance pressures, permanent exclusion quandaries and, of course, accountability challenges as typified by Ofsted.

Each narrative presents a typically complex problem that headteachers can and do face regularly where there are no easy answers and no simple solutions to be found: in each there are competing goods and trade-offs to be considered and navigated. The focus of the five 75-minute sessions is to explore these competing goods and trade-offs, share professional experiences (and their personal impact), and identify non-perfect ways of responding to events.

Introduction

Since September 2024, we have run the Head Cases programme with four different cohorts of serving and aspiring headteachers. As the sessions are confidential to encourage participation and sharing, we do not record them directly but keep anonymised notes of the discussion points which are shared with participants alongside focused signposting of support resources.

These session notes are a very lengthy and very rich source of insights about the ways in which headteachers think and feel about the inescapable complexity of their roles, how they respond to the challenges this complexity presents, and how these reflections on the Head Cases programme enable the to rethink their current or future approaches to headship.

How Head Cases participants think and feel about the complexity of the headteacher role

- **Ambiguity is intrinsic to the headteacher role.** The sessions have illuminated the fact that complex challenges rarely have a single right answer. Leaders often choose between competing goods, imperfect options or different forms of risk.

- **Responsibility feels unusually concentrated.** Although our participants noted that governors, trusts, senior teams and advisers contribute, the final judgement often sits with the headteacher, creating both loneliness and moral accountability.
- **Challenges are experienced personally as well as professionally**. Participants identified anxiety, isolation, self-doubt and frustration. Because they invest strongly in their communities, criticism of the school can feel like criticism of the self.
- **Experience does not remove vulnerability.** Practising heads on the programme showed more confidence but still shared how they can feel bruised or unsettled. Aspiring heads within the cohorts indicated how they became more alert to the emotional and political realities of the role without being deterred from it.
- **Values provide orientation, but not certainty.** Our Head Cases cohorts noted that moral purpose, integrity, inclusion, fairness and the interests of children help them explain and live with difficult choices, even when they do not resolve the dilemma.

How Head Cases participants respond to the complex challenges

- **They slow situations down.** A recurring theme from participants across the cases was the importance of pausing, separating emotion from evidence, establishing a chronology and avoiding reactive decisions. Taking time was seen as a leadership resource rather than a sign of indecision.
- **They use process as a stabilising framework.** Delegates consistently explained how they draw on policies, records, risk assessments and transparent reasoning to help to depersonalize decisions and protect fairness, informing their professional judgement.
- **They combine firmness with empathy.** The leaders joining the sessions kept coming back to how effective responses involve holding clear boundaries while listening, acknowledging harm, preserving relationships and safeguarding children and staff.
- **They seek challenge as well as reassurance.** Trusted peers, coaches, governors, professional networks and external specialists were repeatedly cited by participants. In times of the highest challenge, these external voices were acknowledged for providing support, alternative interpretations and checks on impulsive thinking.
- **They break complexity into manageable parts.** The leaders on Head Cases talked about how they focus by moving from being initially overwhelmed to prioritising immediate risks, identifying what is known and unknown, and sequencing action.
- **They recognise communication as part of the decision.** Another consistent theme from delegates was that explaining rationale, identifying common ground, hearing quieter voices and managing confidentiality are central to successful implementation.
- **They accept that leadership may require dissatisfaction.** Perhaps the most common response from current and aspiring headteachers was recognition that they cannot please everyone. Courage involves acting proportionately despite likely criticism and recognising that delay or avoidance may deepen the problem.

How Head Cases participants have used it to help rethink the headteacher role

- **Individual cases become windows into culture.** Participants across all four cohorts have expressed repeatedly the importance of moving from an approach that asks how an incident should be resolved to one that asks what it reveals about expectations, relationships, power, trust and professional standards.
- **Decisions are understood as culture-making acts.** Perhaps one of the most consistent themes arising from the case analyses was the acknowledgement that what a headteacher chooses to notice, tolerate, challenge and communicate plays a key part in establishing precedents and signaling what the organisation does and doesn't value.
- **The role shifts from solver to system leader.** Head Cases delegates understand, at a deeper level, that sustainable leadership for the headteacher depends on capable teams, strong governance, reliable external relationships and systems that do not leave every issue with the headteacher.
- **Prevention and institutional learning become priorities.** Delegates reaffirmed with each other that, although challenging, complex issues can be beneficial. Difficult events can, should and do prompt reviews of policy, induction, curriculum, staff development, governance, communication and stakeholder engagement.
- **Context and wider society matter.** The sessions were helpful in supporting school leaders to avoid locating every difficulty in personal failure of the headteacher. School-level problems relate to pressures in families, communities, public services, social media, accountability structures, finance and the wider education system.

- **Support for the headteacher is organisational capacity.** Many participants shared with their peers how coaching, supervision, peer networks and wellbeing support have helped them to improve their judgement – and their reflections on their judgement – and therefore strengthen the school.
- **Headship is understood as stewardship.** Across the sessions and cohorts, those involved in the Head Cases programme spoke about how headteachers are temporary custodians responsible for balancing immediate needs with the long-term health, values and sustainability of the community (and of themselves).
- **Case discussion functions as rehearsal.** Participants found that exploring complex (and often messy) situations in a trusted setting enabled them to reflect on previous experience, test assumptions, change their minds and become more comfortable with uncertainty before facing comparable pressures in real time.

Five key challenges and the strategies headteachers use to address them

The Head Cases programme takes place over five sessions, each one of which focuses on a key area of challenge for those taking responsibility for leading schools. These areas are:

1. Parental complaints
2. Human resources
3. Budgeting and finance
4. Permanent exclusions
5. Inspection and accountability

In the panels below, we outline what we have learned about these key challenges from aspiring and serving headteachers, focusing on the most common concerns identified by the four cohorts and the most frequently used strategies they have used to address those concerns.

Parental Complaints

Common Concerns

1. Parental complaints can rapidly escalate and quickly become reputational risks.
2. They can generate anxiety that takes an emotional and personal toll on staff.
3. Balancing the need for improved relations with appropriate boundaries is difficult.
4. Families often get frustrated by, and seek to avoid, processes that schools follow.
5. When schools and families are in conflict, the needs of the child can get lost.

Common Strategies

1. Be ready to slow the process to reduce the emotional temperature of all involved.
2. Follow procedures closely, keeping clear records and timelines of actions.
3. Listen to families, clarify their desired outcome, and acknowledge mistakes.
4. Keep the child at the centre of thinking and seek common ground around this.
5. Draw on external support to help identify and maintain proportionate boundaries.

Human Resources

Common Concerns

1. Often HR issues involve overlapping and sometimes historical challenges.
2. Power dynamics between individuals and groups of staff become problematic.
3. These cases frequently have a negative impact on culture, morale and trust.
4. They can consume headteacher capacity and leave them isolated and struggling.
5. Most HR cases come with procedural challenges and linked legal risks.

Common Strategies

1. Follow policy and process closely and use this to help you maintain objectivity.
2. Pause when needed, separate the mixed issues, and prioritise the most important.
3. Never be afraid of seeking independent, specialist support to ensure impartiality.
4. Anchor subjective decisions in key values and in service of culture building.
5. Plan carefully for support, including your own, and for how the school recovers.

Budgeting and Finances

Common Concerns

1. New headteachers often inherit and must deal with hidden financial challenges.
2. Most chronic financial challenges relate to unsustainable staffing structures.
3. Valued provision (eg. Sixth Form) does not cover its costs and impacts other areas.
4. Leaders and governors have insufficient expertise and may not take ownership.
5. Heads struggle with the human, ethical and cultural impact of tough choices.

Common Strategies

1. Diagnose the problems early to create multi-year plans to address challenges.
2. Ensure alignment of staffing, curriculum and timetabling to ensure sustainability.
3. Build shared leadership and governance financial capabilities thoughtfully.
4. When tough decisions are needed, share transparently and involve stakeholders.
5. Use school values and context to decide on the least harmful sustainable option.

Permanent Exclusions

Common Concerns

1. Navigating the tension between inclusive beliefs and holding students to account.
2. Exclusion decisions involve life-changing decisions with uncertainty about intent.
3. Leaders worry about lawfulness, setting precedents and consistency over time.
4. Fallout can have repercussions for the wider community and school reputation.
5. Internal team disagreement can lead to headteachers feeling isolate from others.

Common Strategies

1. A structured and evidence-led process helps headteachers to mediate risks.
2. Consideration of alternative solutions and engage others in supporting this.
3. Even in the case of exclusion, focus on education, restoration and prevention.
4. Use calm and proportionate messaging to help maintain community trust.
5. Build support and leadership alignment around the reasons for decision-making.

Accountability and Inspection

Common Concerns

1. Accountability to governors/trusts and Ofsted can feel like a loss of autonomy.
2. Heads can feel pressure to compromise their values and professional judgement.
3. Criticism during and after inspections have a personal and emotional impact.
4. In periods of challenge, headteachers can feel isolated and inadequately supported.
5. Accountability systems can be context-insensitive or driven by the blame game.

Common Strategies

1. Staying anchored in personal and school values, purpose and context can help.
2. Seeking trusted professional support that is also focused on the person is critical.
3. Finding the time and space to pause and reflect can help regain perspective.
4. Challenge upwards with governors and trusts to ensure reciprocal accountability.
5. Recognise strength as well as weakness to build a focused, evidenced response.

Final thoughts

It has been incredibly humbling to participate in the Head Cases programme with serving and aspiring headteachers as they talk through fictional cases as a way of mediating their thinking about the real-life cases they have, are and/or will be dealing with in their work.

This has represented 25 hours of my professional life over the past two years and my only regret is that I didn't have those 25 hours banked before or during my nine years as a headteacher.

Case-based exploration is, I am convinced, the best form of professional learning for school leaders who will often have to face complex and often seemingly intractable problems in a safe space.

I have outlined how the research supports using case studies for school leadership development previously, and how this has shaped the Head Cases programme. I hope that the summary of what has emerged in the contemporaneous notes from those Head Cases sessions gives a flavour of the power of this approach.

About the author

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Keven is Director of Education at SSAT and leads the organisation's educational strategy. A former school leader and headteacher, he leads a team committed to the transformative power of education as a vehicle for social justice. His work involves identifying key trends in education policy and practice to provide helpful and sustainable solutions for school leaders and staff striving to improve the lives of children, families and communities.

Want to know more?

If you are a serving or aspiring headteacher interested-but-unsure of signing up to Head Cases, feel free to **book a call with me** to discuss whether it would be right for you.

And if you are a MAT central team leader thinking about how a case-based approach could help a group of your serving and/or aspiring headteachers, I would be happy to discuss this with you.

Find out more about Head Cases