

The Role and Purpose of Middle Leaders in Schools

Summary Report | Summer 2003



A review of literature prepared for NCSL in support of the Leading from the Middle Programme by **Nigel Bennett, Wendy Newton, Christine Wise, Philip A Woods and Anastasia Economou** of the Centre for Educational Policy and Management

 **NCSL** National College for School Leadership

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1. Introduction

1.1 The purpose of the study

Leading from the Middle is a major new professional development programme being offered by the National College for School Leadership (NCSL). This literature review was undertaken as part of the development work for the programme. It examines the changing understanding of the role of teachers who find themselves in the middle layer of school leadership structures.

1.2 The nature of the study

The study, which is summarised here, comprised a review of research on middle leaders, subject leaders, heads of department and pastoral units and curriculum co-ordinators. Only empirical research was examined: autobiographical reflections and instructional manuals were excluded. The review covered books published between January 1996 and March 2003 and articles and conference papers produced between January 1990 and March 2003. From approximately 3700 references, 101 items were identified by the project team as needing reading in depth.

2. Summary of Main Findings which Emerge Consistently from Research

Most of the research focused on secondary rather than primary schools, though it raised important issues relevant to both sectors. There was no significant research on pastoral leadership.

Most of the research was small scale: case studies or ‘snapshot’ surveys. Only three sets of papers reported on more substantial research – two concerned with secondary schooling in England and one with secondary schooling in Canada. The following points emerge consistently from the research reviewed.

1. Middle leaders (subject leaders, middle managers, heads of department, curriculum co-ordinators) play a crucial role in developing and maintaining the nature and quality of pupils’ learning experience, but the ways in which they do this are strongly influenced by the circumstances in which they work.
2. There is a very strong rhetoric of collegiality in how middle leaders describe the culture of their departments or responsibility areas, and the ways they try to discharge their responsibilities. However, this is sometimes more aspired to than real, and it may sometimes be a substitute term for professional autonomy.
3. Middle leaders show great resistance to the idea of monitoring the quality of their colleagues’ work, especially by observing them in the classroom. Observation is seen as a challenge to professional norms of equality and privacy, and sometimes as an abrogation of trust. Subject leaders who managed to introduce some sort of classroom observation procedure did so as a collaborative learning activity for the entire department rather than as a management activity for the subject leader.
4. Subject leaders’ authority comes not from their position but their competence as teachers and their subject knowledge. Some primary subject co-ordinators doubted if they had sufficient subject knowledge, which made it difficult for them to monitor colleagues’ work. However, high professional competence did not appear to carry with it the perceived right to advise other teachers on practice.
5. Subject knowledge provides an important part of professional identity for both subject leaders and their colleagues. This can make the subject department a major barrier to large-scale change.
6. Senior staff look to middle leaders to become involved in the wider whole-school context, but many are reluctant to do so, preferring to see themselves as departmental advocates. This is exacerbated by the tendency of secondary schools, in particular, to operate within hierarchical structures, which act as a constraint on the degree to which subject leaders can act collegially.
7. Very little empirical work was found that examined:
 - the influence of middle leadership on teaching and learning
 - the effectiveness of middle leaders’ professional development

3. Key Issues

The research examined the pivotal role of the middle leader in implementing existing school policies and introducing change. Two major tensions are identified that affect how middle leaders define and carry out their responsibilities.

These tensions are:

- between senior staff expectations that the middle leader would play a whole-school role and a common belief among middle leaders that their loyalty was to their department or subject responsibilities
- between a developing line management culture within a hierarchical school structure and a belief in collegiality

In exploring these tensions, we identified three key issues that ran through the research findings.

3.1 Collegiality

This is almost universally middle leaders' preferred approach to their work. However, researchers rarely examined what collegiality meant, though four points are apparent.

- Collegiality is shaped by national and school-specific expectations, cultures and traditions. It rests on trust, which varies greatly across departments and schools. Trust may be affected by introducing new practices that challenge understandings of professional autonomy, or by external events such as industrial disputes. Where trust is limited, collegial decisions may be confined to issues such as allocating classes rather than to issues of pedagogy or curriculum.
- A rhetoric of collegiality often overlays a considerable emphasis on professional autonomy. For example, it was found that primary co-ordinators often acknowledged that collegiality was an aspiration rather than a reality. Further, the increasing expectation that middle leaders would monitor their colleagues' work runs counter to both the emphasis on collegiality and the norm of professional autonomy.
- Collegial subject areas usually have to exist within hierarchical school structures and formal accountabilities. Subject leaders have to balance their desire for collegiality within their area of responsibility with their line management accountability for the quality of teaching and learning in their subject.
- The language of collegiality often co-exists with an expectation of 'strong' leadership, which is based on high levels of teaching competency and subject knowledge. This stands at odds with the norm of professional equality that underpins collegial approaches.

3.2 Professionalism, accountability and the question of monitoring

Understandings of professionalism involve norms of equality, autonomy and classroom privacy. Middle leaders' growing accountability to line managers for the quality of their departmental work created an expectation that they would monitor their colleagues' work. Whilst this was increasingly being recognised by subject co-ordinators and leaders as one of their responsibilities, most studies found that they still saw themselves as subject administrators rather than as managers or leaders. Informal strategies are employed to monitor colleagues' work, such as looking at assessment results, pupil records and displays of pupils' work, but monitoring through classroom observation tends to be resisted by leaders and colleagues. It is felt to replace trust with surveillance. There were some occasions reported where observation was presented as a collective activity: all observed each other in such a way that it became the basis for discussions which could deepen the degree of collegiality.

3.3 Authority and expertise

Middle leaders have to rely less on formal authority than on informal interactions, people skills and professional respect in order to carry out their responsibilities. Subject leaders' authority is dependent on their professional expertise as a teacher and a subject specialist. In primary schools, subject co-ordinators frequently doubt if their subject knowledge is sufficient to allow them to be directive to their colleagues, or to create a strategic vision for the subject. Secondary school subject leaders tend to be confident of their ability to lead by example in both curriculum and teaching, but they do not view this as giving them the right to observe colleagues: professional colleagues could not be coerced into following their example.

4. Key Influences on Responsibilities and Practice

4.1 From outside the school

National policy developments, such as the National Curriculum and the Ofsted inspection framework created important pressures on subject leaders as they tightened the degree of departmental accountability for performance within a stronger hierarchical structure. Research showed that in the late 1990s subject leaders looked to local authority advisers for information on curriculum developments, resources and professional development opportunities.

4.2 From within the school

Influencing factors include:

- Headteachers and the senior management team – this includes their leadership style and collaborative culture and the extent to which they made their expectations clear
- Institutional culture – ideas of professional autonomy and the value placed on middle leadership are examples of cultural influences
- Institutional structure – some research points to the inhibiting effect on substantial change of subject-focused organisational patterns and hierarchical structures
- Departments – departmental colleagues are seen as a major influence by middle leaders, often because they drew their sense of identity and legitimacy as leaders from their subject
- Subjects – the particular subject of a middle leader appears to have some influence on their responsibilities and practice, though it is difficult to distinguish subject effects from other interrelated influences
- Personal preferences, values and characteristics – middle leaders have choices, within constraints, in their responses to change and in developing their role and practices

Where they are faced with conflicting expectations from senior managers and their departmental colleagues, middle leaders tend to side with their department, which could orientate them to system maintenance rather than change. This can make the subject area a major barrier to change, and some research suggests that the way to bring about major change is to restructure the school to have task-related positions of responsibility associated with whole-school targets and priorities. This was also found to reduce the power of the school principal or head and create more collaborative whole-school decision-making arrangements, which gave the staff holding posts of responsibility a stake in their outcomes.

Subject leaders also have a key role in influencing both school and departmental cultures. They recognise that colleagues need to be motivated and valued. Where an emphasis on innovation in student learning is backed by budgetary and administrative support by senior managers, teachers are more likely to feel valued and take a wider part in the school. This was acknowledged in the restructuring research referred to above.

5. Responsibilities and Practice

5.1 Within the wider school context

Middle leaders operate at the interface between different levels and sources of influence and change. The current pressures towards managerialism have required middle leaders to manage the intersection of traditional and new managerial cultures (managing cultural change). There is often ambiguity about the role and position of middle leaders, sometimes experienced as being caught in the 'crossfire' between the expectations of different levels in the school hierarchy (managing ambiguity).

Tighter managerial control can create an expectation that middle leaders will implement policy directives faithfully and monitor their translation into practice (implementing). However, there is evidence that they interpret their role as buffer and bridge. They filter external demands in ways that make them acceptable and practical within their area, and represent departmental needs and expectations to the wider school community so that the whole-school values and expectations take account of departmental values and teachers' interests. Creating consent can play a crucial role in aligning departmental or subject values with those of the school as a whole, or can block change. It can also place great pressure on the subject leader's time and interpersonal relationships.

While middle leaders recognised that their departmental planning must take account of whole-school priorities and policies, there was not the same acceptance of the need to contribute to whole-school policy making, planning and finance (influencing whole school issues). Subject leaders and teachers alike regarded the advocacy role as a fundamental task. Subject leaders who actively championed their subject area were more highly regarded by their colleagues than more reactive subject leaders, who often 'retired into administration'. Despite this, they frequently played little, if any, part in their school's wider decision-making processes and did not feel that their job was to help frame the wider school policies. They applied pressure and defended their territory rather than take part in decisions.

5.2 Within their responsibility area

Ensuring good teaching and learning was universally recognised as being at the heart of the middle leader's work, but also created some of their most intractable problems – in particular the rival expectations of monitoring and collegiality as indicated above. The administrative tasks (administration) of enabling teaching and learning to occur, such as management of finances, stock and resources, is the most readily understood function of middle managers. Done properly, they create an orderly and secure climate for their teaching staff to work within. Also important is a variety of tasks concerned with curriculum and records, which includes drawing up programmes of work, relating materials and approaches to age/stage, keeping up-to-date on the subject area, providing strategic direction and development of subjects, managing the curriculum, assessment, recording and reporting, and monitoring and evaluating the curriculum.

Collating the results of assessments and recording and reporting on pupil performance provide forms of indirect monitoring for teaching quality (as opposed to the more contentious form of direct monitoring and observation). It was suggested that, because detailed individual student records allow the subject leader to monitor a student's progress over time and compare it with his or her progress in other subjects, maintaining student records was a crucial element of effective subject leadership. Creating a departmental handbook that could set benchmarks for departmental practice is another widely recognised task for a subject leader.

Middle leaders cannot require colleagues to follow their example. There are, however, other ways in which subject leaders can enhance the quality of teaching and learning in their area – for example, demonstrating a commitment to high quality teaching through their own practice helps to create a culture of high expectations and valuing good performance.

There was little reference in the research to subject leaders having any responsibility for staff development. Primary subject leaders acknowledged the importance of auditing colleagues' training needs, but did not appear to take their response further than attempting to lead by example. Secondary school subject leaders saw staff development in terms of remedial work for poor performance, if they acknowledged it at all.

Little empirical research was found on the role of middle leadership in external links with people and agencies outside the school.

6. Effectiveness

Very little research was found that examined the effectiveness of middle leaders, apart from two studies that explored the characteristics of effective departments. One of these suggested that the leaders of effective departments created a vision for the department, monitored staff performance by observing their colleagues' classroom practice and used the results of their observation for whole-department discussion of practice. They also kept detailed records of individual student performance which allowed them to track performance over time. However, there was some concern that the characteristics of effective departments identified in the literature should not become absolute measures of effective departmental leadership.

It was possible to deduce from one set of studies how different groups assessed subject leaders' effectiveness. Although senior managers stated that they wanted subject leaders to be proactive and play a school-wide role, the criteria of effectiveness they put forward suggested 'systems maintenance' rather than 'creative change' roles.

Middle leaders themselves assessed their effectiveness by the extent to which they were able to sustain the 'leading professional' or 'first among equals' role rather than becoming line managers. Their responsibility to ensure effective teaching and learning depended on being able to motivate, inspire and support staff, which was harder in a managerial role. Their approach to these key tasks was, by their own statements, largely intuitive.

In the only study that examined this issue, secondary school teachers expressed judgements on the quality of administration, how far they were involved in departmental policy making, the support they received for professional development and in managing difficult situations, the extent to which good performance was acknowledged, and how far they felt encouraged to achieve the department's visionary goals.

Other research suggested that the leaders of effective departments demonstrated high levels of interpersonal, team-building skills, high levels of trust and the ability to filter external initiatives to prevent overload.

7. Professional Development for Middle Leaders

Very little work was found that focused on professional development for middle leaders. Even less discussed any data on the effectiveness of particular approaches. Some scepticism was visible about traditional models of professional development provision; these were found to be ineffective at changing fundamental attitudes and ways of working. In addition, very few middle leaders appeared to have received any management or leadership training. Self-directed learning, training that provides opportunities for staff to work together and discuss issues, and observation of practice, were seen as helpful, and there was some evidence that these were more effective at changing beliefs and values. Action research and reflection also appeared to be highly regarded. There was some evidence that training which creates a form of learning community would be most popular, particularly where this involved senior staff within the school who could be supportive. There is no longitudinal data on effectiveness, nor on the danger that forms of training such as those outlined here might lack rigour. It was also found that disseminating professional development was more difficult than had been thought, and that what seemed to be a rational process, when participants in research or training made presentations about their work, tended to be seen as a directive and a power-coercive strategy by those attending the presentations.

8. Conclusion

8.1 Implications for professional development

A range of areas in which middle leaders feel they require professional development can be identified from the research literature; some of these are now being addressed. They include:

- classroom management
- teaching methods
- resource management
- assessment
- provision for high/low attaining pupils
- team building
- human resource management
- performing a co-ordinating role (rather than being a subject leader)
- timetabling
- ICT
- in-service training for SENCOs

However there are three broad implications for middle leaders' professional development that we identify and emphasise from our review:

- There is a need for professional development that is focused on how middle leaders can contribute more effectively to teaching and learning within their area of responsibility. This must involve a greater understanding of their role in monitoring, and developing more confidence and competence in carrying it out.
- Middle leaders' professional development needs to address the meaning of professionalism in the current climate and the responsibilities as well as the rights of autonomy.
- Imaginative ways of tackling such issues should be encouraged. The most important forms of professional development might benefit from being collectively undertaken, involving, for example, departmental and whole-school debates on issues to do with professionalism and ways of enhancing teaching and learning, and how staff can work together on these matters.

8.2 Implications for further research

1. There is almost no research into the work of middle leaders whose responsibility is not primarily concerned with subject leadership. Whilst the traditional academic/pastoral split may be breaking down, there are still many staff who have, for example, overall responsibility for students across a key stage. This area urgently needs investigating.
2. There is a need to examine in greater depth the extent to which collegiality exists in practice, its different forms, where its boundaries lie within the school, how tensions with hierarchical contexts and expectations of strong leadership are dealt with, and the factors that enhance or hinder its development.
3. Almost no research was found that examined the process of team building in departments. How middle leadership can effectively contribute to team building is an area of research which links with issues in collegiality.
4. Although the post was created after most of the research examined here had been completed, the role and responsibilities of advanced skills teachers should be examined. Their role may have reduced the extent to which subject leaders see themselves as retaining responsibility for the development of effective teaching strategies within their responsibility areas.
5. There remains little research into the nature of effective subject leadership. What research there is has focused on the characteristics of effective departments: we need to know more about the details of how these are created. Fine-grained studies of middle leaders who are deemed to be effective will help us understand how this is achieved.
6. Research on the effectiveness of middle leaders should include their pivotal role in leading and managing cultural change and the extent to which they are creating a 'new professionalism' that tackles the tensions of managerial and educational aims.

7. Longitudinal studies of middle leaders, as opposed to departmental or school effectiveness, should be undertaken. These would help us to examine ways in which effectiveness is measured and the wider organisational contexts which may influence the effectiveness of areas of responsibility.
8. Much of the research that has been undertaken in this area has comprised small-scale case studies. There is an urgent need for larger scale and longer term studies of middle leaders in action.

Appendix 1

Abbreviated Notes on Key Texts

Whilst we have used a variety of published articles and conference papers in our study, we have for the most part only included published articles and books in this list. We have also only referred to one publication from each of the major studies referred to in the text. A full discussion of each of the key articles in this appendix is available in the full report, where we have also provided a further set of notes on other important articles and a full list of articles and papers consulted.

Adey, K. (2000) “Professional Development Priorities. The views of Middle Managers in Secondary Schools”, *Educational Management and Administration*, Vol.28, No.4, 2000, pp. 419-431

This article examines how secondary school heads of department identified their roles and the training and development they needed (in the late 1990s). In particular, it shows that the heads of departments in the study acknowledged that they needed to escape from the "bunker mentality", and that departmental planning should be undertaken within whole-school priorities. They identified a range of planning skills required to carry out this role effectively.

Brown, M., D. Rutherford and B. Boyle (2000) “Leadership for School Improvement: The Role of the head of department in UK secondary schools”, *School Effectiveness and School Improvement*, Vol.11, No.2, 2000, pp. 237-258

This article, one of a number that report on aspects of a single research study, examines the role of the head of department in UK secondary schools in terms of its potential for school improvement. Using work-shadowing and interviews, it identified the heads of departments' leadership styles, the extent to which they felt empowered in their work, initiatives they had undertaken to promote better teaching and learning, and obstacles they were encountering in carrying out their work.

Fletcher, L. and D. Bell (1999) *Subject Leadership in the Primary School: Views of subject leaders. Paper presented at the annual conference of the British Educational Research Association, Brighton 1997*

From this small scale study of 20 primary school subject leaders it is argued that there is a growing consensus about the leadership function of the co-ordinator, which is in line with TTA standards. However, the way their headteachers interpreted the standards is sometimes unclear and could make unrealistic demands upon co-ordinators. The authors report considerable disagreement between what subject leaders believed they should do and what co-ordinators actually did. In particular, there was great reluctance to undertake what the authors call more 'directive' roles, such as classroom monitoring, partly because they doubted that they had sufficient subject expertise.

An updated discussion of this paper has been published as:
Hammersley-Fletcher, L. (2002) “Becoming a Subject Leader: What’s in a Name? Subject Leadership in English Primary Schools”. *School Leadership and Management*, Vol. 22, No.4, pp. 407-420

Gleeson, D. and F. Shain (1999), “Managing Ambiguity: Between markets and managerialism – A Case study of ‘middle’ managers in further education”, *Sociological Review*, 47(3), pp. 461-490

This paper “critically examines the complex and contradictory role played by academic ‘middle’ managers, as mediators of change, in the reconstruction of professional and managerial cultures in the Further Education sector. It explores the role played by middle managers as an ideological ‘buffer’ between senior managers and lecturers through which market reform is filtered in the FE workplace”. Fieldwork was conducted from January 1997 to March 1998 across five colleges in three counties in the English Midlands.

Glover, D. and D. Miller with M. Gambling, G. Gough and M. Johnson (1999), “As Others See Us: Senior management and subject staff perceptions of the work effectiveness of subject leaders in secondary schools”, *School Leadership and Management*, Vol. 19, No. 3, pp. 331-344

This article was one of a number published on a large-scale study in English secondary schools. It reports that senior staff stated that they wanted subject leaders to take a creative, whole-school role, and to be initiators of change, but then based their judgements of their effectiveness largely on systems-maintenance criteria. Many subject leaders saw their role as being one of overseeing teaching and learning in their subject area, and to be an advocate for their subject. They were most likely to take a wider view of their role in schools that avoided departmental or faculty-based structures.

Hannay, L. M., C. Smeltzer Erb and J. A. Ross (2001) “Building Change Capacity Within Secondary Schools Through Goal-driven and Living Organisations”, *School Leadership and Management*, Vol. 21, No.3, pp.271-287, 2001

This article reports on a five-year study of school change undertaken in a school district in Ontario. It suggests that heads of subject departments (departmental chairs) represent major barriers to school change and that a solution to this is to restructure schools. However, the restructuring that was found to be most effective in promoting change was one in which much more authority was given to the whole staff to set school priorities; then responsibility for leading the staff towards those priorities was given to staff who held so called posts of responsibility (POR). These posts were task-specific rather than structural, and because incumbents had a significant role in deciding on the priorities for their work it is argued, they were far more effective at promoting and achieving change.

Harris, A., I. Jamieson and J. Russ (1995), “A Study of ‘Effective’ Departments in Secondary Schools”, *School Organisation*, Vol. 15, No. 3, pp.283 – 299

This small-scale qualitative survey by interview has become an almost seminal work. It sought to establish whether common characteristics were displayed by effective departments in secondary schools. The authors argue that there were a number of common characteristics to these “effective” departments, many of which were directly related to the actions and style of the department head; notably a clear vision, a clear role as ‘leading professional’ within a collegial culture, characterized by a constant interchange of professional information, and high levels of trust. The heads of effective departments also protected their colleagues from inappropriate pressure by screening possible innovations.

Harvey, M. (1997), “Secondary Teaching Administrators in the Government Schools of Western Australia”, *Leading and Managing*, Vol. 3, No. 1, pp. 26-47

This paper reports on a survey which examines the impact of the introduction of School-Based Decision Making and Management (SBDMM) in Western Australian schools on the group of staff called third level secondary teaching administrators (STAs), many but not all of whom are heads of academic departments. The paper explores the nature of the changes and STAs’ reactions to them, and argues that in a culture of trust departments can become creative and innovative rather than simply administrative arrangements for allocating classes and duties.

McGarvey, B. and S. Marriott (1997), “The Role of the Core Subject Co-ordinator in Supporting Differentiation in Northern Ireland Primary Schools”, *School Leadership and Management*, Vol. 17, No. 3, pp. 375 – 86

This article reports on data from one aspect of a much larger study, focusing on interviews with co-ordinators. It found that co-ordinators operated on the philosophy that they were professionals among professionals. They held regular meetings with colleagues to plan topic coverage and ensure clear progression for pupils. Their principal duties were advisory rather than directive, relating to classroom management and assisting with planning schemes of work, but they would only advise on classroom practice by invitation. Monitoring classroom practice and ‘imposing’ practice was a major problem for them, even when the purpose and focus of the visit was agreed.

Sammons, P., S. Thomas and P. Mortimore (1997) *Forging Links: Effective Schools and Effective Departments*. London: Paul Chapman Publishing

This major study of departmental effectiveness places the department in the school context, and identifies a range of activities for heads of department that appear to be associated with the most effective departments. In particular, they emphasise vision, setting high standards, a culture of respect amongst staff and for the children, together with classroom monitoring as the basis for whole-school discussion of practice.

Warren Little, J. (1995), “Contested Ground: The basis of teacher leadership in two restructuring high schools”, *The Elementary School Journal*, Vol. 96, No. 1, pp.47-63

This study emphasises the central importance of ‘the subject’ in secondary schools, even when attempts are made to reorganise the school on a different basis. It was found that teachers’ subject specialism constitutes, at one and the same time, an intellectual disposition, a source of professional identity and community and an important resource in the distribution of power and authority, and that teachers regard ‘subject expertise’ as a guide to professional competence. This has an impact on whom they consider has a legitimate right to exercise leadership and led teachers in strong and cohesive departments to view leadership initiatives from the perspective of their potential effect on their subject curriculum, which remained the case even when the school had restructured on inter-disciplinary lines.

Wise, C. and Bush, T. (1999) “From Teacher to Manager: The role of the academic middle manager in secondary schools”, *Educational Research*, Vol. 41, No. 2, pp. 183-195

This paper draws on a large-scale survey of middle managers to examine how they perceived their role. While middle managers acknowledge the importance of management tasks in their work, including monitoring staff performance, their key role still relates to their teaching. Despite middle managers’ acceptance of these new dimensions of their role, they find that they have insufficient time to carry them out. They see their departmental colleagues, rather than their senior managers, as the key influence on their teaching.

Wise, C. (2001) “The Monitoring Role of the Academic Middle Manager in Secondary Schools”, *Educational Management and Administration*, Vol. 29, No.3, pp. 333-341

This paper examines the extent to which secondary school subject leaders were prepared to acknowledge and carry out the task of monitoring the performance of their departmental colleagues. The research found that departmental colleagues were a far greater influence on subject leader practice than were their senior staff, and that subject leaders would resist changes that appeared to conflict with the opinions and values of their departmental staff. In particular, this created difficulties for the monitoring role. Although most subject leaders accepted that this was part of their work, they were reluctant to undertake it as it appeared to create a “line management” relationship between the subject leader and their department, and replace a climate of trust with one of surveillance. There was little formal monitoring, and this was achieved mainly through looking at marking and comparing test results. The expectation of more formal monitoring through classroom observation was placing the subject leaders under considerable stress.