

# Middle leadership and its challenges: a case study in the secondary independent sector

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## Abstract

This article presents initial findings from a case study of the challenges facing newly appointed middle leaders in an independent school in the North West of England. The research approach has included interviews with twenty-five staff from within the school. It was observed that the skills set needed for middle leadership is different to that of the classroom teacher. The challenges faced by the middle leader come from a variety of sources which appear to lie largely outside the middle leaders' control. However, there are also several factors that do lie within the middle leaders' sphere of influence and which enable them to deal with and overcome the challenges they face. Linking this to international research into skills acquisition, it is concluded that for the newly appointed and inexperienced middle leader there are specific and identifiable factors that can be prioritised for development, and that more focussed approaches of leadership development should be adopted.

## Keywords

independent school, leadership development, middle leaders, newly appointed

## Introduction

Those taking on leadership roles in schools require a different skills set to that of a classroom teacher, yet many of those appointed do not always receive appropriate training or guidance on leadership development. This article outlines the key findings that have emerged from a study that has been undertaken into the perceptions of middle leaders, particularly during the first months of their appointment. A case study approach was employed in a single-sex (boys) independent school (secondary) in the North West of England where, due to the retirement of a number of staff, there has been a series of promotions of teachers to their first leadership position. The study involved primary research into the experiences of these middle leaders as they moved from leading and managing pupils in a classroom to that of also leading and managing their peers. This article thus focusses on two areas of research that have hitherto received little attention: middle leadership (Thorpe and Bennett-Powell, 2014) and an independent school (Harvey, 2007).

## Background and context

Leadership in educational organizations is of increasing importance internationally (Boylan, 2016), and whilst educational leadership development has been a feature of most educational systems in recent decades, (Brundrett, 2008),

the ways in which different parts of the globe approach this topic varies according to national, regional, local and school contexts (OECD, 2008). Some countries such as the USA have taken the path of locating their school leadership development in universities (Brundrett, 2008) whilst, for instance, the Hong Kong programme draws on research evidence of what is successful, linking real school contexts, a substantial input of experienced leaders as mentors, opportunities for reflection and cohort bonding and networking (Walker and Dimmock, 2008). In the Netherlands, which has a decentralised education system, schools are free to distribute functions to several leaders and so the role of school leaders varies between schools (OECD, 2012). By contrast, in Africa issues of race, gender, faith and class, together with the contexts and backgrounds of participants, are of real significance to educational leadership development programmes (Moorosi, 2014; Naidoo and Perumal, 2014; Diko, 2014; Johnson, 2014). Clearly the discourse is highly nuanced, reflecting the particular educational exigencies of the host nation, and understandings of leadership developed in one place may not necessarily generalise into another (Lazaridou and Beka, 2015). However, considering that the fee-paying, or independent,

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sector of education in the UK educates some 6.5% of the pupil population (ISC, 2016), we know surprisingly little about the leadership that takes place within it; in fact the empirical evidence on leadership in the independent sector has been described as ‘under-researched almost to the point of invisibility’ (Harvey, 2015).

Effective leadership is a vital component of successful schools (Bush, 2008), although a teaching background does not in itself lead to the skills required to deal with the wider role of leadership (OECD, 2008). The growing complexity of problems facing schools means that there is too much to be done in terms of leadership and management for it to be the preserve of one person, and so a key group in the model of distributed leadership has been the subject and year heads who have the role of acting as a fulcrum between the classroom teachers and the school’s senior leaders (Brundrett and Terrell, 2004). These middle leaders are those who, whilst still retaining their primary involvement with teaching (Crowther, 1997), hold posts such as heads of academic subjects, pastoral heads, Special Educational Needs Coordinators (Bush, 2003; Busher et al., 2007). Such post holders need to be able both to lead and manage, because not only do they need to lead change and develop people, but also they must maintain their department through the management of systems and administration (Early and Weindling, 2004). This stage of leadership, in which teachers begin to take on leadership and management responsibilities for the first time, has been termed ‘emergent leadership’ (Bush, 2008).

Schools are complex organisations. They are in a constant state of flux (Bush, 2011) and the typical day for the middle leader is one that is long and seemingly in which all the work is rarely completed (Gunter, 2001). Teaching staff are individuals, each of whom will have an agenda: thus it is the role of the leaders to draw together these individual agendas and orientate them toward the overall aims of the institution (Busher and Harris, 2000). The formation of a ‘vision’ and its subsequent articulation is held to be a central component of leadership (Shipman et al., 2010), and a powerful dimension of leadership is the establishment of a clear sense of direction and purpose (Day et al., 2011). However, despite its apparent importance, there is little known about how leaders actually go about creating viable visions (Strange and Mumford, 2005; Kantabutra, 2010; Martin et al., 2014; Murphy and Torre, 2015). In order to monitor and evaluate middle leaders, their role should be clearly defined (Gunter, 2001); however, Davies (2009) observed that schools are distinct from other organisations in that the boundaries between roles are highly porous, making it difficult to delineate such roles clearly. These leaders constitute a diverse group, each having not only responsibility delegated to them, but also being directly responsible for others (Turner, 2007) and so they frequently find themselves in the uncomfortable position of being squeezed between the conflicting requirements of the senior leadership team and their departmental colleagues (Bennet et al., 2003; Bush, 2003; Branson et al., 2016). It can be this challenge of being ‘sandwiched between’ (Marshall, 2012) that is the most taxing for emerging leaders

(Thorpe and Bennett-Powell, 2014). Schools are most commonly structured in academic, pastoral and leadership teams and, as such, have ‘communities of practice’ (Wenger, 1998). Most staff will be a member of more than one community, adapting their practice as they cross the boundary from one community to another. A consequence of this is that a teacher may be a leader in one context and a follower in another (Briggs and Coleman, 2007), a scenario that has been described as the ‘complex matrix’ of leadership (Busher and Harris, 2000). The business of teaching is hectic and fast paced, leaving little time for reflection (Davies, 2009); and the work of the middle leader requires further time and energy, not least because much of what needs to be done takes place in time-pressured periods such as break and lunch times, or between lessons (Brundrett and Terrell, 2004).

The role of the middle leader in a school is thus demanding, different to that of the classroom teacher, and so a new set of skills needs to be learned. Dreyfus and Dreyfus (1980) identified five levels of skill acquisition which they defined as ‘novice’, ‘competent’, ‘proficient’, ‘expert’ and ‘master’, a model that has subsequently been adopted by many educators (Carraccio et al., 2008). During the early stages of learning a new skill, a novice will rely on an analytical and theoretical method of reasoning; however, as they become more experienced and confident, they will draw on previously experienced ‘scripts’ to use a non-analytical or pattern-making reasoning (Carraccio et al., 2008). Through experience of different situations a learner adds to their repertoire of scripts, enabling them to expand ever more complex patterns or mental maps and thus to make swift, intuitive decisions (Sergiovani, 1985; West-Burnham and Koren, 2014). Leaders therefore learn to draw on a broad, deep and ever-growing repertoire of experience, none of which will emerge from teaching alone (OECD, 2008). Because those appointed to middle leader positions will be leading peers, possibly for the first time, and because this calls for different skills to those of the classroom teacher, it is most likely that the emergent leader will be in the novice category of skills acquisition, and therefore their training and development should differ from that of a more experienced leader.

## Methodology

The aim of the study was to undertake research within a clearly bounded case from which the researchers could collect data and build theory from what they saw, heard and recorded (Denscombe, 2010; Walliman, 2011). As noted above, the school in which the research was undertaken employed at the time a number of newly appointed middle leaders, and it was decided that the most appropriate method for gathering the data would be a series of semi-structured interviews: this enabled the researchers to ground the questioning in the literature whilst offering flexibility, allowing them to be reflexive and responsive to information given by the participants (Kvale and Brinkmann, 2009). The process involved a constant comparative process drawn from the domain of grounded theory (Glaser

and Strauss, 1967), using a method of initial coding followed by subsequent second cycle coding which enabled the codes to be organised into a smaller and more select list of themes (Saldaña, 2013). In total 25 teaching staff were identified and interviewed, as the study sample, all of whom had a leadership role within the school.

A problem of which one of the researchers was aware, both before and during the interview schedule, was that of his own position within the study. Because he knew all the participants, some of them well, he understood that the relationship between himself and the interviewees would not only be mutually affective (Alvesson and Skoldberg, 2000), but also that it was highly likely that there would be a power asymmetry (Kvale and Brinkman, 2009). This raised the question of the extent to which objectivity could be attained, if at all. Denscombe (2010) stated that if a researcher sets out to be objective through being detached and open minded, then the researcher should be able to get a clearer view of the object being studied. With this in mind, the present researcher set out to ask the smallest number of questions that was reasonable during each interview, whilst keeping the questions as open as possible given that sometimes he wanted to explore particular avenues. This approach allowed the interviewees to speak at length, largely uninterrupted. The patterns which were revealed through coding were in agreement with those in the reviewed literature, thus demonstrating a degree of construct validity (Burns, 2000; Denscombe, 2010); and consistency across the responses indicated high internal validity (de Vaus, 2001). By means of careful recording of the process the researchers made the steps transparent and auditable (Yin, 2009), working to ensure that any subsequent researcher following the process would be able to see clearly from where the conclusions had been drawn.

## Research design and implementation

Following a review of the literature, a series of propositions or 'temporary conceptual tools' (Thomas, 2011) that specified the basic conditions that underpinned the research (Denscombe, 2010) were drawn up, and these were used to inform the interview schedule. Four of the propositions were as follows:

Proposition 1: Middle leadership is important within the school because as an organisation it is too complex for one person to administer.

Proposition 2: There are specific capabilities required by middle leaders.

Proposition 3: The capabilities required for leadership within the school context are not necessarily the same as those needed by the classroom teacher. There is an identifiable 'capability gap'.

Proposition 4: A programme of support to emerging middle leaders has the potential to benefit the emergent leader, the sub unit (their department), the organisation and, most importantly, the pupil.

The interview questions were developed on the basis of these propositions, each question being linked to at least one of the propositions, and the 25 participants were interviewed over a 22-month period. Initially the research was confined to those who were in the first two years of their first leadership role in the school. However, as the interview schedule progressed the researchers became aware that those who were in their first two years of middle leadership might 'not know what they don't know', and so the study was extended to include more experienced middle leaders, i.e. those who were in middle leadership positions but had held their post for more than two years. The coding of the transcripts began early in the process, with the results informing the subsequent questioning, enabling ongoing development of and adding focus to the questions presented to the interviewees. The findings continued to be coded as the interviews were transcribed and, as time went on, the data of the main codes 'thickened' whilst the identification of new codes became less frequent.

## Analysis of the findings

From the coding process approximately 750 items of data were identified, constituting 40 codes within six main themes. The interrogation of the data brought clarity to the picture of middle leadership and two points stood out as recurring themes across the interviewees. First, it became apparent just how much of a challenge the participants experienced in moving from leading and managing children to leading and managing adults. It was clear that whilst teachers have developed leadership and management skills in their classroom practice this did not prepare them for leading their peers, giving credence to the proposition that the skills needed for middle leadership are not the same as those required for classroom teaching. Second, whilst the researchers were specifically interested in the interviewees' experience in their leading and management of adults, it was observed that a number of participants continued to emphasise their professional relationships with pupils rather than exploring their role as a leader of colleagues or a subject. On coding this aspect, it was noted that approximately 75% of interviewees spoke about their pupils, some at considerable length, confirming Crowther's contention (Crowther, 1997) that an important dimension of the teacher leader's work is that their primary concern continues to be teaching. A key point during the coding process was identified when it was noticed that a significant number of the codes could be placed into one of two themes. First, a cluster of those factors that appeared to make life difficult for the middle leader emerged; these were entitled 'factors that challenge'. Second, a cluster of factors appeared that make it possible for middle leader to lead and manage their departmental members; these were entitled 'factors that enable'.

## Factors that challenge the middle leader

When asked about their experience of middle leadership, none of the recently appointed participants were able readily to define the bounds of their role. As one teacher said,

‘... the whole nature of the job is vague and amorphous’ (Participant 9). This echoes the issue as identified by Davies (2009) and is potentially problematic because whilst the role of middle leader is often reactive and unpredictable, participants found the lack of a clearly structured role challenging, particularly during the early period of their appointment. Maintaining the school’s culture was mentioned by a number of the interviewees with one representative comment being that, ‘... this is how we’ve always done it’ (Participant 5), and this was observed within the contexts of both the whole school and individual departments. This can be a challenging factor because newly appointed middle leaders aspire to change things for the better, but they can feel constrained by the habitual behaviour of the organisation or members of their department. Accountability to the expectations of the organisation was a consistent theme, and this manifests itself in the unrelenting demand for exam results ‘... because we’ve got the pressure of achieving results’ (Participant 24). When asked what was the hardest thing they found about the role, a significant number of the participants responded that it was their departmental members: ‘The management of the staff is the biggest part of the job’ (Participant 5). On closer inspection of the data it would appear that there may be two reasons why this is so. First, it may be because people see things differently:

... because at the end of the day, we’ve all got our opinions, and our own take on things. (Participant 21)

Second, middle leaders may have people in their departments who are at different stages of their career:

... one person past retirement who maybe had lost interest in the job ... another person at the other end (for whom) everything is brand new and struggling with the basics. (Participant 7)

In agreement with Bennett et al. (2003) and Bush (2003), the demand to lead a sometimes disparate group of professional people towards the objectives of the organisation is an area of tension articulated by a number of the participants. On the one hand they are the leader of their department and its spokesperson to the senior leadership; on the other, however, they are also called on to be the voice of the senior leadership to the department, and this further agrees with the assertion of Marshall (2012) that middle leaders are ‘sandwiched’:

... that’s one of the worst aspects of being a head of department, being piggy in the middle. (Participant 18)

Because hierarchically the school is a ‘flat’ organisation, with a significant number of its teachers staying for many years, there is limited scope for internal promotion, and so the school tries to ameliorate this by offering a range of responsibility posts, such that many teaching staff are in charge of something and somebody. The middle leader often has a member of their department whose priority can be elsewhere for some, if not all, of the week: ‘... other

people in my department have other responsibilities’ as Participant 14 stated it, echoing the ‘complex matrix’ defined by Busher and Harris (2000). That middle leaders have much to do in a complex and fast moving environment is compounded by the lack of time that they feel they have: ‘There is never enough time to do the job’ (Participant 23). Because the role is frequently reactive – ‘... your day can be very quickly hijacked by anything that comes along’ (Participant 24) – and the middle leader is expected to be the leading practitioner and thus usually having a significant teaching load, they find they are unable to be as proactive as they would like in, for example, departmental meetings: ‘... you don’t see them [members of the department] as often as you should’ (Participant 14). Thus the pressures of time appeared to be as significant in this independent school as they do in studies undertaken in other sectors (Davies, 2009; Brundrett and Terrell, 2004). Finally, participants in the study reflected on what they perceived as a lack of preparation for the role. As Participant 16 said, ‘In terms of my induction as a head of department, I didn’t have any’, and a number of interviewees spoke of the challenge they encountered during the initial stages of their first middle leadership role: ‘One of the steepest learning curves I have been through’ as Participant 8 described it.

These are the main factors that challenge the middle leader in an independent school, and it is of note that each of these factors is beyond the direct control of the middle leaders themselves.

## Factors that enable the middle leader

During the process of coding a number of codes emerged within a theme suggesting that there are clear, identifiable factors that make the role of the middle leader possible. Whilst some authors consider vision definition and creation to be problematic (Strange and Mumford, 2005; Kantabutra, 2010; Martin et al., 2014; Murphy and Torre, 2015), the data from the interviews suggest that a clear objective is an important factor for middle leader – knowing where they want the department to go and articulating it to their team:

I think it’s about setting out your market stall at the beginning of the year, and expectations, and communication between form tutors and the boys as well as what is expected, and what is coming up, and just trying to talk about that, so they know expectations and can respond accordingly. (Participant 23)

A key attribute for the middle leaders in this present study was that of being the dominant practitioner:

I think it’s very important as a head of department that your department think well of you, and look up to you for having some experience that they haven’t got. (Participant 24)

This theme is not widely acknowledged in the literature, probably because most research is concerned with senior leadership where subject-specific expertise is of less

importance. While the pace of work is fast, participants acknowledged that a degree of self-reflection and self-awareness was advantageous:

... you must be able to reflect, or think about what you do, if you are going to get the most out of yourself. (Participant 6)

One participant observed that although reflection was important it needed space and, as Gunter (2001) noted, this could be difficult to find in a busy daily schedule; however such time that could be found was well spent, because participants noted the importance of knowing their own leadership style:

I like to portray a relaxed style of leadership... I have tried other approaches, and frankly it doesn't work for me. (Participant 11)

For a number of the participants, this self-knowledge was something that they appeared to have thought about over time and, in a couple of cases, appeared to link to their views on integrity: '... you've got to be true to whoever you are for people to understand' (Participant 6). So, knowing oneself through self-reflection and thus being oneself appear to be important leadership attributes to those interviewed. The importance of knowing their team members also appeared as a theme:

Well I think that is important... it's know your staff, know where their strengths are, know their areas of interest as well. (Participant 19)

The reasons for getting to know their staff are multifaceted and respondents stated that building trust, developing respect and creating emotional ground were reasons for doing so. Some spoke of the potential pitfalls of getting it wrong:

It's got to be fundamentally one of the most one of the most crucial things in the job. Because if you don't understand the people working for you, they will pick it up, and it won't work as a team... if it's misjudged, people will become harder to work with, and more unpredictable, and less reliable and trust-worthy. (Participant 8)

Knowing their staff well had the more pragmatic value of facilitating the ability to identify and use their strengths in the support of the overall vision:

Making sure that you're using their strengths rather than putting them into a situation where it's their weaknesses that come out. (Participant 6)

The step change from classroom teacher to being the leader and manager of adults required the middle leader to draw on experience, and it was interesting to see where this came from. The research points to three areas. First, experience which had been acquired previously:

There were things I was doing at (my previous) school... running departmental trips, writing schemes of work for just one of the year groups... taking responsibility for them... and I think those things have stood me in good stead for starting here. (Participant 15)

Second, that which was acquired 'indirectly' or in alternative contexts such as having leadership responsibility in a position outside the school environment:

If you were in a band, and you were going to a gig, you would find that bands tend to be full of people who are individuals... so how you then get that collection of individuals to produce one thing is difficult... how you manage that, those skills are transferable skills. (Participant 12)

Third, there was referred experience – asking the advice of others who had undertaken a similar role:

I would go to certain people at certain times (and ask) 'What would you do in this situation?'. (Participant 8)

Experience was expressed as a key enabler by many of the participants. It gave them previous scripts on which they could draw, thus allowing them to make swift intuitive decisions (Dreyfus and Dreyfus, 1980; Sergiovanni, 1985; Carraccio et al., 2008; OECD, 2008; West-Burnham and Koren, 2014).

There were two key themes of middle leadership in the case study: those factors that make it a challenge and those that make it possible. There is, perhaps, a further observation to be made, which is that the inhibiting factors appear to be largely outside the influence of the middle leader, whilst the enabling factors appear to involve aspects of leadership that can be supported through a programme of leadership development.

## Discussion

The main conclusion to be drawn from this study is that middle leaders in this independent school faced similar challenges to those encountered by middle leaders in other educational environments. They inhabited the same fast-paced, reactive and frequently contradictory environment described in the literature, they continued to place the pupils at the centre of all that they do (Crowther, 1997), and they were surprised by the step change from classroom teacher to middle leader (OECD, 2008). Because many teachers in the school had a responsibility for something beyond their classroom responsibilities, there seemed to be more 'communities of practice' (Wenger, 1998) and a more finely woven 'complex matrix' (Busher and Harris, 2000) than was evident in other studies. This may reflect the nature of an independent school where teachers are expected to take on a range of responsibilities. The factors that challenged the middle leaders (job descriptions, deeply embedded culture, expectations of the school, departmental members, 'piggy in the middle', pressure of time) coincide with the findings of other, wider research, although the objectives of the school (in particular, the drive for good

exam results) tended to be driven more by parents' expectations than by government policy. The factors that enable middle leaders to overcome the challenges that they face (vision creation and articulation, dominant practitioner, personal reflection, knowing their departmental members, experience) are those that can be learned by middle leaders through a leadership development programme. However, the theme of experience, whether prior (that which had been learned in a similar environment before taking on the role) or parallel (that which was acquired in a different environment and which could be transferred) came across strongly in the data, and links with the area of research into skills acquisition.

## Conclusions

This study has combined two areas that have hitherto been little researched, those of middle leadership and the environment of an independent school, and has identified some of the challenges that are faced by those who are, perhaps for the first time, leading and managing their peers. There is much in common with middle leadership in other educational contexts which would suggest that the findings here will relate to those from the wider field of research. The study points to the importance of accumulating experience that will enable the novice middle leader to construct a wider repertoire of personal scripts on which they can draw, enabling them to move from an analytical approach to leadership to a non-analytical approach which leads to swifter and more intuitive decision making. The step change from classroom teacher to middle leader is an important transition because lessons learnt at this stage may provide the foundations for subsequent promotion to senior leadership, and we would argue that any middle leadership development programmes should be built around the established needs of emergent middle leaders, taking into account the context in which they operate. Middle leadership in an independent school appears to be similar in nature to that in other educational contexts, any differences being nuanced rather than significant. However these are the findings from one case, and so we suggest that there is benefit to be gained for both independent schools and the wider research community if more studies are undertaken in this area. We also recommend further research into the link between the needs of the inexperienced middle leader and our understanding of skills acquisition, because we believe this will allow those who design leadership development programmes to do so with a greater understanding of what is needed, and how it may best be acquired.

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