The Role and Purpose of Middle Leaders in Schools

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Appendix 1

Methodology used in carrying out the middle leadership review

The references used in the present review came from a number of databases and a review carried out by EPPI (Evidence for Policy and Practice in Education).

The review team agreed on certain criteria to be used in order to carry out the review including selecting references found in databases.

It was decided to look at the following databases:

- Social Science Citation Index
- EBSCO
- ERIC (including International ERIC)
- Education Line
- SWETSNET
- JSTOR[2]

There was an agreement between the team members regarding the terms that should be used in the database search – these terms are comprised of a combination of the words head/leader/ leadership/management.

The criteria used in the initial selection of references following the database search include:

- exclusion of articles less than six pages
- exclusion of references on curriculum development
- inclusion of references to primary, secondary and post-compulsory education (including higher education)
- inclusion of book reviews in a separate Word file
- inclusion of articles published after 1988
- inclusion of books published after 1995
- inclusion of articles and books written in the English language
- inclusion of articles and books from the following countries: UK, USA, Canada, Australia, New Zealand, Hong Kong, Singapore, The Netherlands, South Africa

These criteria were further used to select references included in a review on middle leadership carried out by EPPI.

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[2] At a later stage it was thought that it might be a good idea to search through the World Catalogue database but due to time limits it was abandoned.

The references selected (from the databases and the EPPI review) after applying the selection criteria are stored in a database (an Access table); each reference in this database is described by a record number, author, date, title, journal title/book title, publisher, number of pages, country of research, source (eg database through which it was found as well as the key words used[3]); there is further information about the availability of the reference and the process of getting access to it, the date it was given to the reviewer and the way that the reference was read, ie skim read or fully read.

Database searches produced the following number of references:

- Search in EBSCO produced 347 references – 34 of these were selected and included in the Access database while 12 references out of the 347 were book reviews and were included in a separate Word file created for the storage of reviews.
- Search in SSCI produced 168 references – 27 were selected for the Access database
- Search in ERIC produced 1,115 references – 62 of which were selected for the Access database.
- Search under the keywords in Education Line brought about only five references. Further search under the keywords: leadership, leadership sharing, leadership training, co-ordinator, managers, head gave 1,715 references but only 13 of these references met the criteria and were included in the Access database.
- Search in JSTOR (this database has only four education journals – all of them in completely different areas to the middle leadership) did not produce any results.
- Search in SwetsWise gave 312 references – only 22 of which met the selection criteria.

From the 148 references included in the EPPI review 22 met the criteria set in the present review and were included in the Access database.

After each search was complete and the selected references were entered in the database the reviewers would read through the abstracts (and in some cases the full text) and decide which of the references would be kept for reviewing. A reference was qualified for reviewing when at least two reviewers agreed. The database created for the present review includes 236 references in total. The reviewers considered that 101 from these references were suitable to be included in the review.

The reviewers were provided with full text for all the references which were selected for reviewing[4].

The reviewers devised a protocol which was followed in each reference they reviewed. Some references were skim read while others fully read.

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[3] Category **'Keyword '** refers to the term/s used in the database search; category **'Keyword 2'** and **'Keyword 3'** refer to the terms provided by the reference details – if available; in cases where the reference in the database did not suggest keywords then **'Keyword2'** refers to the first term used under 'subject headings' by the database where the reference was found while **'Keyword 3'** refers to the theme that appears to be the most prominent after the first reading of information about the reference in the database (source).

[4] References were downloaded from electronic sources or found in the Open University's library or ordered via interlibrary loan; some of them were not found; while a few of them (primarily theses) which have been ordered from oversees have not arrived as yet.

Keywords

The keywords used in the database searches (and selecting references from the EPPI review) were:

- course tutor
- curriculum leadership
- curriculum leader
- curriculum manager
- curriculum management
- curriculum co-ordinator
- cross-curriculum co-ordinator/ cross-curricular co-ordinator
- departmental leader
- departmental chair
- departmental head
- departmental manager
- heads of department
- heads of year
- heads of faculty
- head of house
- head of lower school
- head of middle school
- head of upper school
- ICT co-ordinator
- key stage co-ordinator
- literacy co-ordinator
- middle leadership
- middle leaders
- middle manager
- middle management
- numeracy co-ordinator
- SENCO co-ordinator =/special needs co-ordinator
- subject co-ordinator
- subject leader
- subject leadership
- subject teams
- subject team leaders
- team leader
- teacher leaders
- year co-ordinator

*   Any combination of the words head/leader/leadership/management

**   Date: any publication after 1988

***   Language: English

****   Country of origin: UK, USA, CANADA, Australia, New Zealand, Hong Kong, Singapore, The Netherlands, South Africa

Appendix 2

This appendix summarises some of the most significant articles found in this review. However, in relation to the two major studies by Brown et al and Glover et al we have only listed one article here. Others are summarised in Appendix 3, sometimes at length.

We have also limited this appendix to published papers.

Adey, K. (2000) 'Professional Development Priorities. The views of Middle Managers in Secondary Schools', *Educational Management and Administration,* **vol 28, no 4, pp419–31**

Aims: The main focus of this study is the professional development needs of middle managers. It follows up the findings from an earlier survey of secondary high school professional development co-ordinators (1995) from one English LEA. A particular need identified in the earlier study was for professional development to support middle managers in adapting their role in light of changing needs and priorities. Within a wide range of development needs identified, three main areas of concern emerged:

- whole-school issues including finance, development policy, priorities
- developing departmental policies and budgets within the whole-school framework – shedding the 'bunker' mentality
- role of middle managers in monitoring and evaluation and identification of development needs for staff – appraisal was failing to inform planning of professional development

This subsequent study carried out in 1997 with middle managers from the same LEA, confirmed that professional development priorities for middle managers revolve around training to enable them to fulfil newly accepted aspects of their role:

While middle managers increasingly accept responsibility and accountability for quality of teaching and learning, they feel ill-equipped to carry out these roles and see themselves essentially as line managers responsible for ensuring that whole-school policies and practices are translated into action at departmental level (p429). Of the top 10 items identified by respondents as important training needs, eight related to the quality of teaching and learning. This priority is clearly related to external pressures (including introduction of compulsory appraisal of staff, curriculum changes, Ofsted and TTA core purpose of the subject leader), while at the same time acknowledged as most difficult aspects of middle managers role, especially where it involves dealing with performance problems.

On one hand while middle managers recognise that their departmental planning needs to take account of whole-school priorities, at the same time there is not the same acceptance of the need for them to contribute to whole-school policy-making, planning and finance, and they feel ill-equipped to do so

Adey maintains TTA standards represent a major step, but the TTA at the time of this study (late 1990s) was ahead of thinking and practice of middle managers as revealed by this research. Middle managers acceptance of responsibility for staff performance was reactive in the sense of responding to poor performance rather than proactive in anticipating and providing leadership for teacher professional development. (Some resonance here with findings from Hannay). Also, there was little evidence of middle managers themselves accepting the role of contributing to whole-school policy-making.

This study gives some indicative directions for future investigation, but in itself is limited to a sample of middle managers in one LEA. It does not indicate how complete or representative the sample of schools from which data is drawn and, with a 45% response rate of middle managers, there is no indication of any follow up investigation of any significant features or characteristics of non-respondents, eg gender, length of time in post, age or other characteristics.

Brown, M., Rutherford, D. and Boyle, B. (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, pp237–58

This paper reports on how heads of secondary school departments and their senior staff perceived the role of the head of department. It drew on eight intensive case studies of heads of department, using work shadowing and interviews, along with extended interviews with senior staff and documentary data from the school, including inspection reports and development plans. The case study data were then discussed with a focus group of 24 heads of department.

The findings showed that while heads of department are stated to be the key to improving the quality of the learning process, they are too often bogged down in routine administration.

In an audit of the role as defined by heads of department and deity headteachers, the authors found that heads of department identified a number of key challenges to their role – lack of time, space within the department, the need to support "failing" teachers or non-specialists, personnel management, homework policy and staff morale. They acknowledged the importance of promoting and encouraging good teaching as the key to good departmental performance, but many of the potential strategies they identified to improve or sustain improvement, such as team work and quality lesson preparation were prevented by a lack of time and co-operation. There was little staff development, and responsibilities for resource acquisition varied between bidding for a budget and "booking forms for books/videos".

Deputy headteachers looked to their heads of department to act as a supportive agency for the senior staff's policy. They were often described as lacking charisma and failing to take a whole-school perspective or work together. Development plans were acknowledged to be "not working documents", and there was little connection between the staff development plan and policies and the overall school and departmental development plans. They paid lip service to the need for a more horizontal structure, but that hierarchy was the reality.

Focus group discussion revealed general agreement that many tasks that had traditionally been regarded as the province of the senior staff were being given to the heads of department, especially in the areas of finance and discipline. Ofsted had reduced their autonomy and made them more of a "buffer" between the aspirations of their colleagues and the needs of the national curriculum, with school policy decisions being made in relation to inspection issues rather than the priorities of the heads of department.

They identified four key priorities for further research:

- the relationship between leadership and management styles and departmental needs
- responding to the pace of change
- how senior staff and the heads of department interact
- the importance of departmental documentation

Collegiality was seen as an important aspect of departmental leadership practice, and heads of department were trying to move towards it. But the common values and understandings were not always to be found, and there is a danger of balkanisation as departments unify around different values from those articulated for the wider school. One approach to this might be to

incorporate some heads of department into senior management teams, but this was found to create work overload and role ambiguity. There is also a danger that the drive towards consensus that so often underlies collegial practice will generate complacency and conservatism. They suggest that a focus on technical skills is not sufficient for professional development: it is necessary to create a sound understanding of the nature of the role.

Fletcher, L. and Bell, D. (1999) *Subject Leadership in the Primary School: Views of Subject Leaders.* **Paper to the BERA conference, University of Sussex, Brighton, September 2–5**

This is a small-scale study of 20 primary school subject co-ordinators, whom the authors call subject leaders. They argue that there is a growing consensus about the leadership function of the co-ordinator, and that the TTA standards represented the basis against which to judge their subjects' responses. The methodology consisted entirely of semi-structured interviews with the 20 subject leaders.

Content analysis identified a total of 51 tasks undertaken by the subject leaders, related to tasks they undertook, should undertake, and which made them effective in their work. Only five came into all three categories: a further 11 were tasks they both did and believed they should do, and eight were tasks that they did not do, but should have done and would make them more effective.

Comparison with the four key roles of the subject leader and associated tasks, as proposed in the TTA standards, found that few TTA tasks were seen as important and contributors to effective subject leadership. About half the subject leaders felt that they were undertaking strategic leadership, but only developing a positive climate within the subject area was seen as crucial. There was great reluctance to get involved in issues around teaching and learning. Half were involved in developing arrangements for assessment, recording and reporting on progress, but it was not seen as appropriate to ensure curriculum coverage or set clear teaching objectives – what Fletcher and Bell call "more directive roles" – nor would these contribute to effectiveness. Monitoring was achieved through checking on test scores, assessments and display work. Training needs, auditing, motivating and leading by example were seen as important, and resource acquisition and management was widely done, but not seen as contributing to effectiveness. Subject leaders wanted to spend more time on professional development work with their colleagues.

Subject leaders indicated that they sought to sustain a collegial culture, but their descriptions of their work suggested that for many this was aspired to rather than achieved. Despite this, it is suggested that the national curriculum and TTA demands did not take account of the collegial culture of primary schools.

Subject leaders identified a number of problems. Time was a key issue, which made it very difficult to monitor colleagues' work, but also very important was lack of confidence in their knowledge of the subject. This made it difficult to express a vision for the subject area, and to lead by example in its teaching. Money was not a problem, however.

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, pp407–20)**

Gleeson, D. and Shain, F. (1999), Managing Ambiguity: Between Markets and Managerialism – A case study of 'middle' managers in Further Education, *Sociological Review*, 47(3), p461, 30 pages

Findings

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 … [and 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". Three themes are identified in relation to the role and practice of middle managers:

- 'caught in the middle' – between senior managers and lecturers and between finance and curriculum issues
- 'managing ambiguity' – their identity as a 'manager' is not fully understood by lecturers or senior management, or even among middle managers themselves
- the management of consent – translation of policy into practice. It is striking, in middle managers' accounts, "how highly they regard achieving effective working relations with teachers and senior managers" – they "filter change in both directions" (p5)

The authors emphasise that middle managers play an active and crucial role "in the reconstruction of professional and managerial cultures" in a time of rapid and unpredictable change. Three models of response are outlined:

- willing compliance: characterised by expression of a deep commitment to the FE institution and its corporate image (mostly women)
- unwilling compliance: the unwilling complier is more sceptical and disenchanted with the new FE ethos
- strategic compliance, which involves strategic 'reading' and interpretation of change to their own and the organisation's advantage and holding to the essential quality of education (eg protecting teaching from administration), whilst reacting pragmatically to changes – the vast majority fell into this category

In maintaining personal and professional distance from 'the corporation', the 'strategic compliers' (see below) "managed and adopted context specific identities in their routine practices at work"; and by drawing on "residual elements of public sector professionalism and reworking these values within the context of an incorporated and marketised model of FE, strategic compliers present a challenge to managerialism …" (p12)

Research evidence

Fieldwork was conducted from January 1997 to March 1998 across five colleges in three counties in the Midlands (UK). In each institution, semi-structured interviews were undertaken with a cross-section of 20 to 25 individuals, including principals, governors, senior and middle managers, lecturers, support staff and union representatives. In all over 150 interviews, including some follow up and group interviews, were conducted, as well as collection of documentary data and observations of key meetings. The middle management focus is part of a larger ESRC funded project Changing Teaching and Managerial Cultures in FE. It is likely that the data do give some insight into the variations of responses by middle managers, and the paper contains many useful illustrations from middle managers. The validity of the conclusions and the robustness of their categorising middle managers as strategic compliers, willing compliers etc are not discussed. With regard to recurring themes identified, it is not clear how many middle

managers express views that represent each of the themes – so, for example, when the authors state that most who fall into the 'willing compliance' theme are women (p8), no indication is given of the size of the group being referred to.

Glover, D. and Miller, D. with Gambling, M., Gough, G. and Johnson, M. (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, pp331–44**

This article was one of a number published based on the large data set the researchers gathered during their work. "The evidence was gathered from a management effectiveness audit completed by 507 subject teachers, 112 questionnaires completed by subject leaders and structured interviews with 25 senior managers and 56 subject leaders" (p331). It was conducted in English secondary schools and throughout the article data are presented to support the conclusions.

The focus of the paper was on the "evidence which relates to the ways in which subject leaders were seen to undertake their role by senior managers and their effectiveness as judged by members of staff who were being led" (p331). An important overall finding was that "by examining the relationship between senior management and subject staff perceptions in the school, [they] conclude that those schools which value and develop their subject leaders, often through reformed structures, are more likely to be those schools in which the subject staff feel they are well led" (p331).

There was a clear expectation amongst the senior managers that subject leaders should be involved in whole-school decision making and strategic planning with "most senior managers [arguing] that subject leaders should also be involved in the establishment of whole-school aims and objectives" (p333). "In 13 of the schools … the senior staff identified a lack of interest or involvement of the subject leaders in whole-school aims and objectives as a problem for school development." (p 335) It is interesting to note that "both subject leaders and the senior managers expected to be involved in the development of whole-school teaching and learning policies …" (p336). It is possible that the agreement here is because of the closeness of these policies to what subject leaders saw as their core task, that of overseeing teaching and learning in the classroom. This is further highlighted by the finding that many subject leaders "... did not consider that their role extended beyond that of advocacy of their subject" (p336).

This expectation that subject leaders would be active in matters of the curriculum was emphasised further by the level of autonomy that subject leaders were given in curriculum matters. "In 21 of the 24 schools this was recognised with accountability through line management systems and annual reviews with a senior manager" (p337). This is in contrast with the recruitment and professional development of staff where subject leaders autonomy was limited even though in 19 of the 24 schools they were responsible for the professional development of staff once appointed. This is perhaps because of recognition by the senior managers that staff management caused problems for subject leaders.

The rather limited view of the responsibilities of the subject leader are highlighted by the fact that most senior managers, when asked about their expectations of effective subject leaders, listed only the "maintenance functions" (p336) of the subject leaders. This is in contrast to the finding that senior managers believed "subject leaders should be initiators" (p335). It is not surprising therefore that the team found "the understanding by senior management of the work of subject leaders appears pivotal to their effectiveness" (p334).

Three forms of organisation were evident in the schools. These were termed: traditional, faculty-based and curriculum-led. The traditional forms tended to produce subject leaders who played little part in whole-school development except for administrative management tasks. Those schools which had attempted to reorganise to enable more effective subject leadership appeared to have moved forward although not universally. The schools that were successful in reorganising to empower and enhance the role of subject leaders were most likely to be collegial in atmosphere and with high levels of trust. This is an indication that reorganisation of structure alone can not lead to more effective subject leaders.

> Weaknesses occur where subject leaders see themselves in a traditional role limited to responsibility for organising resources and possible schemes of work. … In response to pressures, especially those arising from enhanced responsibilities for monitoring and evaluation, some subject leaders 'retreat into administration so that they can plead that they have not got the time to undertake additional duties' … any attempt to enter the classroom of another teacher or to take part in appraisal or evaluation compromises professional relationships. (p341)

Hannay, L.M., Smeltzer Erb, C. and Ross, J.A. (2001) 'Building Change Capacity Within Secondary Schools Through Goal-driven and Living Organisations', *School Leadership and Management*, **vol 21, no 3, pp271–87**

This Canadian paper examines the issues involved in changing the role of middle leaders/managers away from the traditional role of chairs of academic departments in hierarchical structures. It draws on data from an extensive longitudinal study of schools in an Ontario school district which required all its schools to abandon their traditional organizations and job descriptions, but did not mandate how they should reorganise. The data were collected through a combination of annual questionnaires, focus group discussions and individual interviews over a six year period.

The researchers found that some schools had great difficulty at the outset, but increasingly became committed to the task. Increasingly the "middle leaders" (posts of responsibility) became responsible for specific tasks that related to annual development plans drawn up collaboratively by the whole staff, who were also responsible for setting annual goals and reviewing progress towards them. Interviewees commented that it was important to see the structure of the school as "constantly in flux" and needing to "keep it fluid, keep it moving. And keep moving people through those positions. When I took the position I knew it wasn't for ever. I knew it was part of an ongoing process." (p15)

The authors argue strongly that restructuring the organisation must precede reculturing, which contradicts conventional wisdom in England (see, for example, recent work on effective leadership by Harris et al (2003)). "Leading from the middle", and the work involved in it must depend on prior decisions on what "the middle" is, and what the relationship is of those in "the middle" to the decision-making processes in the school. A committee that reviews and defines goals rather than having them imposed by diktat (from within or outside the school) creates different roles and relationships for the middle leader, who becomes a facilitator rather than a director. Teachers pointed out that if a decision was made to focus on assessment and evaluation, for example, then someone had to take responsibility for overseeing that work, and if mentoring was seen as a priority, then resources had to be made available for it. Moving from role-created leadership from the middle to task-focused leading from the middle has resource implications for which the school must be ready.

It also leads to a new culture developing as individual teachers feel more important and more involved in the school's decision making, and so in a position to influence school policy, rather

than being "a little wheel" in a school with "a great big Science department, a big Math department" (p15). The authors comment that "the increased involvement in decision making and teacher leadership contributed to a growing sense of empowerment but also the participants reported that they learned the importance of both accepting a divergence of perspectives and facilitating dialogue as a means of constructively addressing differences" (p19).

The paper argues that a structure of involvement in decision making and a flatter decision-making structure creates a clearer sense of why the holders of posts of responsibility have the duties they do, a greater willingness on others' part to assist in the work and a stronger sense of facilitation rather than direction. The evidence suggests high level of staff satisfaction with the reculturing that results from restructuring. However, no empirical evidence is presented on the impact of these changes on student performance.

Harris, A., Jamieson, I. and Russ, J. (1995) "A Study of 'Effective' Departments in Secondary Schools", *School Organisation*, vol 15, no 3, pp283–99

This small-scale qualitative survey by interview has become an almost seminal work. The study, which was in a city in the south-west of England, had the aim of trying to establish if effective departments in secondary schools had any common characteristics. It used semi-structured interviews with the senior management teams, the departmental members and pupils of six 'effective' departments. 'Effective' was defined as showing significant added value to pupils' learning in a multi-level school effectiveness analysis. Whilst we are not presented with the raw data, the assimilated data we are given supports the conclusions.

It was found 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. Whilst there has been some argument more recently about the importance of context, the findings are probably broadly generalisable, although it is important to note that these are characteristics of effective departments. It is not possible to extrapolate and say that therefore ineffective departments do not have these characteristics.

> All of these departments were marked by a clear and shared sense of vision that largely emanated from, and was propagated by, the head of departments. … great emphasis on collegiate styles of management adopted by the head of department. … marked by a constant interchange of professional information at both formal and an informal level. (p287)

There were a large number of the characteristics that could be related to interpersonal skills.

> The heads of department exhibited trust in their colleagues, and most teachers in the department were allocated particular responsibilities for which they took the lead on behalf of the whole department. … All of [the heads of department] could probably be described as 'leading professionals' in the sense that their own mode of practice was regarded as the model to follow … they safeguarded their colleagues from inappropriate developments and unnecessary additional work by carefully scrutinising the latest developments. … All of these heads of department seemed very skilled at managing interpersonal relationships within their departments. (p288)

Harvey, M. (1997) Secondary Teaching Administrators in the Government Schools of Western Australia. *Leading and Managing*, vol 3, no 1, pp26–47

This paper 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. Data were collected through a survey, and the paper reports on the statistical analysis of closed questions and quotations from free response questions. The posts examined have an 80% teaching commitment, with 20% for "administration". The administrative responsibilities included managing student behaviour, responding to mail, reviewing documents and draft policies, budgeting and cost centre management, management of physical resources, preparing documents, dealing with the mistakes of other administrators, engaging in whole-school planning and serving on committees. The author comments that some of these demands which were seen as "administrivia" were, however, central to the move to SBDMM. A majority of head of departments surveyed felt that they were providing educational leadership for their area, were guided by a clear sense of how they contributed to school effectiveness, were paying attention to colleagues' professional development needs, improving their own professional performance, performing significant whole-school roles and achieving high levels of professional satisfaction from their work. However, substantial percentage of respondents felt they were being too reactive, had a broad range of disparate and disconnected responsibilities, were caught in a crossfire of conflicting expectations between principals, deputy principals and teachers and were preoccupied with administrative work at the expense of their capacity to demonstrate educational leadership in teaching programmes.

Changes in the head of departments' responsibilities in response to SBDMM were: a greater emphasis on departmental staff management, administration and financial management, curriculum management, classroom teaching, school-level planning, policy-making and administration; student management; school and community interaction. Head of departments were seen positively as pivotal in the move to SBDMM, and the broadening of their responsibilities was beneficial, but negatively in that they were not conversant with them. A third view was that the head of department would be phased out in favour of other kinds of STAs. The extent to which the changing role could be achieved successfully was seen to depend on the wider school context. In particular, how far the school was prepared to operate on a collegiate rather than the more typical micropolitical basis. Union issues were seen as a problem with this, and with staff management in general, in the wake of a bitter industrial dispute in the previous year. This had a bearing on trust. The author concludes that "where departments or teams are characterised by a collective view about purpose, action and even identity among the participants then there is a large potential for STAs to harness the creative energies of staff to achieve specific change initiatives. Other departments or teams, however, may exist as little more than forums for the allocation of a minimal set of responsibilities and duties." (p34)

McGarvey, B. and Marriott, S. (1997) "The Role of the Core Subject Coordinator in Supporting Differentiation in Northern Ireland Primary Schools", *School Leadership and Management*, vol 17, no 3, pp375–86

This article draws on data drawn from a much larger study which looked at provision of differentiation across a large number of primary schools in Northern Ireland. The research was carried out over three phases with the second phase being with a random sample of 150 from 845 primary schools in Northern Ireland. The overall response rate was 65% after one reminder. The third phase was the case studies carried out by semi-structured interviews and observation

in seven schools selected to give a spread across Education and Library Boards, school size and type of catchment. Of the 21 teachers interviewed, six were co-ordinators.

> In the case study schools all six coordinators said that regular meetings were held to plan topic coverage with input from all staff and, at this stage, part of the coordinator's responsibility was to ensure that progression was clear, that there was continuity and that overlap and duplication were avoided. (pp3–4)

The majority of co-ordinators saw their principal duties as "advising on classroom management, clarifying ways of ensuring progression and continuity and helping to plan schemes of work. Few considered that advising on differentiation within topics or advising on the assessment of pupils for grouping formed part of their role." (p4) The other responsibilities that they accepted as part of their role included: "finding certain, specific resources, carrying out administrative duties associated with their subject, keeping up-to-date in their field and simply offering moral support and positive encouragement to colleagues beset by heavy demands in a myriad of subjects." They were willing to "offer advice to colleagues in a classroom context" but only if they were asked. This need to be asked was because of their assumption of the role that they were acting as "professionals amongst professionals." (p4)

The co-ordinators in the case study schools were closely involved in planning to ensure progression and continuity. However, only two of the six interviewed said that they formally evaluated these or any other aspects of differentiation. In addition, the principals "did not expect their coordinators to have a strong staff development role. … they saw coordinators [as] mainly concerned with producing subject policy documents and schemes of work, managing resources and acting as a source of subject-related advice and current awareness for other teachers." (p6) The headteacher's perception of the coordinator's duties and responsibilities was of key importance and their attitude "crucial" (p4).

The perennial problem of monitoring of teaching and learning was present.

> Reluctance to enter colleagues' classrooms to evaluate or to appear to 'impose' aspects of a differentiated curriculum was stressed by all coordinators interviewed. In any case, there was said to be neither the time nor the opportunity in the normal school day for coordinators to do anything other than class teach. Not all teachers had directed (non-contact) time, so any discussions with coordinators were said to be informal and hurried or else they took place after an intense working day. (p4)

There was an example though where even if many of the barriers were removed, monitoring through entering the classroom of another teacher still presented problems. In one large school, "the head set aside money each year and timetabled the coordinators so that there could be a proactive element in their role. They were to visit each class once a term to observe schemes of work in action and to see how differentiation was working out." The co-ordinator interviewed from this school still admitted to having "reservations about entering a colleague's classroom on this kind of exercise". This was even though the nature and purpose had been clarified in advance of the visit. (p5)

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

This is a study of the characteristics of academic subject departments in secondary schools which appear to be effective in terms of achieving high "value-added" results for their students consistently over a period of five years. Having identified these characteristics, they indicate elements of practice that were found to exist in the more effective departments.

The research methodology involved two surveys, with a case study phase sandwiched between them. The first survey identified effective departments on the basis of value-added scores over a five year period, using sophisticated multi-level modelling statistical analysis. In the second phase, six detailed case studies were undertaken, two of "effective" departments, two "ineffective" and two "mixed". From the data gathered in these detailed case studies, a second questionnaire was constructed and used in a survey of English and Mathematics departments to identify the characteristics of effective departments and the activities of their heads of department that appeared to relate to them.

Case study data showed that practice relating to departmental effectiveness – which was not necessarily intra-departmental practice – involved:

- creating a strong academic emphasis within the department
- establishing a strong and consistent policy on homework and marking
- a shared vision for the department, although this was more important for the headteacher than for the head of department, whose vision should be congruent with that of the headteacher. Related to this, heads of effective departments emphasised mutual support and the consequences of effective whole-school policies
- a strong senior management team providing a sense of community. Heads of less effective departments sought a stronger sense of community across the school
- a strong emphasis on teamwork among the heads of departments
- a departmental culture that emphasised teachers' high expectations of students' performance and behaviour; firm but friendly classroom control; teacher enthusiasm; good teacher/student relations; and punctuality

Although there was an emphasis on teamwork and consistency, they were surprised to find that there was no relationship between departmental effectiveness and a particular pedagogical approach: indeed, there was far more consistency within subjects, effective or ineffective, than across effective departments.

Their discussion of their data from the second case study phase presents a clear sense of the effective head of department leading by example and fostering teamwork. The second survey indicated that the key criteria for judging effectiveness were the quality of teaching and the extent to which the staff work as a team. They state that "HoDs have the primary responsibility to monitor pupil progress and raise achievement. To achieve this it is important that they create or maintain a shared vision of their department and foster high expectations for all students … among their department's teachers." (p205) Key activities in this work relate to team building and leading by example, and monitoring performance, including observation. They argue that good records must be kept of individual students' performance so that they can be compared with their progress in other departments, and overall progress with similar departments in other schools. It is argued that observation is important, but only as a basis for discussion, and they offer a set of questions that might form an agenda for such discussion, and which they state are relevant to whole-department review as well as for discussion of individual lessons. However, in this discussion it is difficult to be certain what are empirical statements of practice and what are normative recommendations derived from an interpretation of their data.

An important element of their work, implied in the discussion of their departmental effectiveness, is that although departments can vary in effectiveness within a school, the school context appears to be an important influence on the department's effective, which rather contradicts the argument of Harris, Jamieson and Russ. This is visible in, for example, the emphasis on teamwork among the heads of department and the importance attached to the school having a strong sense of community – something that the heads of departments found to be less effective wished for strongly.

Warren Little, J. (1995) "Contested Ground: The Basis of Teacher Leadership in Two Restructuring High Schools", *The Elementary School Journal,* **vol 96, no 1, pp47–63**

The importance of this study is in what it tells us about the strength of the subject in secondary school organisation. As they say in the article:

> … the image of 'contested ground' illuminates the ways in which traditions of subject specialism shape assumptions about the exercise of leadership among secondary teachers.

The case study data that they collected permitted "comparisons of traditional department head roles with 'restructured' leadership roles that span subject boundaries" (p47). They found that "subject expertise [proved] a powerful warrant for teacher leadership and a basis for professional community even in the context of interdisciplinary structures" (p47). As a result they contend that the study "challenges simplistic stereotypes of the 'subject-centred' high school teacher but also demonstrates the power that subject affiliation retains as high schools restructure" (p47).

The article is based on their "… preliminary analysis of a small body of data collected over two years (1992–4)" (pp48–49). The data are based on the "experiences of teachers and teacher leaders in two moderately large high schools, both in relatively mature stages of school-level restructuring. Both schools enrol approximately 2,400 students and employ a teaching staff that numbers more than 100." (p48–49) The schools were selected for their reputed efforts to transform secondary education through the nature and scope of their changes. The data were gathered through "open-ended and semi-structured interviews of 53 teachers, including 21 present and former teacher leaders; from observing teachers at work with one another in committee meetings, teacher planning sessions, in-service education activities and informally throughout the working day; and from our review of key school documents, including demographic profiles, restructuring plans and reports, yearbooks, and teachers' work assignments" (pp48–49). The term 'teacher leadership' appears to be used to describe any leadership role taken on by a serving teacher, or one whose main work is in the classroom and is therefore paid as a teacher. Some of these posts would be more akin to a subject leader or head of department in England. This opinion is supported by the statement that "at the school level, the position of department head is the most common form of teacher leadership" (p51).

They found that in general:

> Subject departments constitute a central feature of the structure of authority and influence in high schools – a structure in which teachers' claims to resources, their justifications of classroom practice, and their assertions of autonomy are closely linked to subject specialization. (p50)

They go on to say:

> Even acknowledging this [wide] variation and the multiple and embedded contexts that shape teachers' work in high schools, it remains evident that subject affiliations and departmental membership play a large role in defining teachers' relationships with colleagues and in mediating their relationships with administrators, the community, and students … The persuasiveness, continuity, and salience of departmental organization – regardless of local variations in departmental influence – are dominant factors in shaping the grounds of leadership within secondary schools. (p51)

They recognise that "… the department head appears to have substantial power to shape professional community within the department" (p51) and draw on the work of McCartney and Schrag (1990) who found that "departments where classrooms scored highest on measures of

higher-order thinking, department heads took an active role as curriculum and instructional leaders; in those departments where classrooms scored lower, department heads adopted a more administrative role".

Importantly they found that teachers regard 'subject expertise' as a guide to professional competence. This has an impact on who they consider has a legitimate right to exercise leadership.

> Teachers in cohesive departments with a history of strong leadership thus seem particularly disposed to concentrate on subject qualifications as the basis for legitimating leadership roles and to interpret leadership initiatives from the perspective of their potential effect on the subject curriculum. (p54)

They conclude that the "… 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" (p55).

Wise, C. (2001) The Monitoring Role of the Academic Middle Manager in Secondary Schools, *Educational Management and Administration*, vol 29, no 3, pp333–41

This report is part of the same study as reported in Wise and Bush (1999) (see Appendix 3). This examines case study data constructed on the basis of Yin's (1994) literal replication. Data collection was via interviews with the head of departments' role sets, documentary analysis and observation of management meetings. Analysis was undertaken in relation to four aspects of the head of department role – academic, administrative, managerial and educational. Focus was on the heads of academic departments.

Departmental colleagues were the key influence on head of departments' management style in relation to all four aspects of their role. Where senior staff expectations where at odds with departmental colleagues, so that the head of departments were pressed between senior staff and departmental colleagues, they tended to side with their departmental colleagues. Therefore senior staff must address staffs' expectations of the head of department as much as the head of departments' expectations of themselves. There was some evidence to "support the idea that some groups within the role set might find their expectations of the middle manager not being enacted because their expectations are not perceived by the middle managers to be as legitimate as those from other groups, for example staff from outside the subject or area team such as pastoral leaders or cross-curricular co-ordinators" (p340).

Heads of department saw monitoring colleagues' work as an obligation and a priority, and it was stated to be part of their responsibilities in staff handbooks. However, they were reluctant to do it themselves, and believed their departmental colleagues would resist if they tried. This was true, but often less so than the heads of department thought. But some departmental staff saw observation as an abrogation of trust, and associated it with accountability and surveillance rather than with issues of equity. Even when the heads of department was acknowledged by their colleagues to be an expert teacher this didn't necessarily lead to others acknowledging their right to observe lessons. Some heads shared heads of department concerns about monitoring, despite Ofsted expectations.

Where monitoring was undertaken, it didn't usually include ongoing review through sharing plans or assessments. Lack of non-contact time allied to timetable arrangements made observation and monitoring difficult except via students' work and assessment.

A key consideration for heads of department/middle managers was their wish to preserve a culture of collegiality within their departments. Consequently, "line management" relationships with departmental colleagues were "generally one of casual informal enquiry". This collegiality co-existed with, or developed within a hierarchical structure. It was also "bounded" in that it was far stronger within department than within wider boundaries. This could create tension between the head of department/middle manager and the SMT, but "collegiality [was] weaker among HoDs, across departments, with heads of pastoral care and SENCOs" (p34).

Appendix 3

This appendix contains summaries to articles and papers that were influential in our work. It includes several articles that relate to important studies led by Brown and Glover, and also refers to some important unpublished papers.

Abolghasemi, M., McCormick, J. and Conners, R. (1999) "The importance of department heads in the development of teacher support for school vision", *The International Journal of Educational Management*, **vol 13, no 2, pp80–86**

The benefits of the teachers in a school sharing the vision of the head is documented elsewhere, this study set out to discover whether there was a role for the department head in this process and whether the organisational structure had an impact on this. There was evidence that the stronger the linkages between the departments the stronger were the teachers' alignment with the head's vision. It was suggested that the heads of department play a mediating role between the head and the teachers.

The evidence was gathered from a questionnaire distributed in 28 randomly selected high schools in Sydney, Australia. 273 were completed and this sample included 59 department heads and 214 teachers. The instrument was divided into two parts; the first about the principal's visionary behaviour and the second about departmental sub-cultures, interdepartmental relationships and the extent of agreement of the teachers and department heads with the principal's vision. Extensive statistical analysis was done on the outcomes and quoted.

Adducci, L.L. (1990) The Departmental Chair: role ambiguity and role strain, Pennsylvania. Research for Better Schools

Six determinants of the departmental chair role were identified: job description, functions, goals, extent of agreement by role senders, professional development opportunities and resources. The job description was considered to be a vehicle for formal communication of the duties and expected priorities. The department chairs expressed concern that their job descriptions were not sufficiently focused on curriculum and instruction and that they constantly lost instructional improvement time to administrative tasks. If there was high agreement between the role senders about the role then the tasks were clearly defined but many departmental chairs were not clear about the expectations others had of them.

The research was carried out in Canada in 1988–89 by a team of six interviewers who carried out interviews with 56 departmental chairs in six comprehensive and three magnet high schools over a two week period. The data are well presented with quantitative as well as qualitative outputs. The conclusions appear valid and are very similar to findings from studies in the UK at about the same time.

Anderson, D. (1998) Departmental Effectiveness: a secondary school case study. EdD thesis, Newcastle-upon-Tyne

The study identified statistical differences in effectiveness between departments in a 'successful' school.

Single case study in an 11–18 school. The study reports the statistical evidence and suggests that a detailed case study can reveal more subtle variations between departments than broader studies.

Bell, D. (1996) *Subject specialist, co-ordinator, leader or manager*? **Paper to British Educational Research Association Conference, Lancaster University**

This paper examines the changing expectations of subject leaders in official statements and charts the change from informal subject specialist supporting colleagues to the designation as subject manager. It also reviews literature concerning their role and concludes that there is broad agreement on the nature of the role of the co-ordinator which includes communication with headteacher, exercising curriculum leadership, communication with staff, organisation of resources, establishing and maintaining continuity through the school, organising in-service work, liaison between head and staff, establishing record systems, motivating staff and curriculum development. A pilot study found that:

- curriculum co-ordinators doing a variety of tasks, some part of the management function, but some not – eg technician, administrator, cleaning and little/no monitoring/evaluation
- time restrictions to do curriculum co-ordinator role
- conflict of responsibilities – eg responsibility for multiple curriculum areas plus own class
- burden of managing change falling more and more on curriculum co-ordinators
- there are pleasurable aspects to curriculum co-ordinator's role

The paper is based on a review of official statement, 1905 to 1995; review of research studies; pilot phase for a larger study – a group of 20 curriculum co-ordinators, attending a module for curriculum leadership as part of an MEd programme, were asked to keep a diary for four weeks in a given format. Conclusions regarding the latter are appropriately modest.

Boodhoo-Eftekhari, C.N. (undated) Investigating School Effectiveness and School Improvement in Secondary Education in Guyana: a qualitative study. PhD thesis, Sussex

Heads of subject departments were aware of their responsibility for supervising the work of teachers in their area through scrutinising their plans, monitoring their teaching and checking the quality of learning. However, they frequently did not carry out these duties because they were teaching full-time themselves and had other tasks to complete that impacted on their available time. There was some evidence that heads of department preferred to keep lesson observation at an informal level so that relationships were not damaged. It was intended that monitoring should be linked to professional development, ie the quality of teaching and learning would be improved through difficulties or weaknesses identified being the subject of training. However, the lack of active monitoring prevented this process being enacted.

This study was based on case studies of six secondary schools in Guyana to look at their contexts in depth. The case studies were conducted through interviews and observations. This was carried out by a single researcher and the data were well reported.

Brown, M., Boyle, B. and Boyle, T. (2000) The shared management role of the head of department in English secondary schools, *Research in Education***, no 63, pp33–47**

The study reported in this article aimed to identify the extent/existence of any decentralised management models within schools and the impact of those models and to establish whether delegation (from headtachers) reaches to, involves and empowers the middle management level. The paper identifies three types of school:

- Type A – which demonstrate, amongst other things, commitment to regular formal opportunities for collaboration between heads of department and colleagues across subject area
- Type B – which show less collaboration than in Type A, but cross-departmental collaboration is valued
- Type C – which is characterised by little formal collaboration and a wide divide between role of the senior management team and heads of department

The authors conclude that this constitutes an "emerging paradigm" of three levels of shared management in schools. They also claim that in Type C schools (where most heads of department were not consulted in whole-school decisions and were perceived by senior management as not having whole-school management role) it was "obvious" that these "isolated conditions" impede professional growth by making it difficult for teachers to exchange ideas among themselves and administrators.

The study was conducted in 1997/98 with a sample of 30 heads of department: 24 drawn from 20 11–16 secondary comprehensives in north west England from different types of urban area; six from one secondary comprehensive in a rural area in the south Midlands. Semi-structured interviews were conducted. A panel of four experts was consulted on coding and interpretation of data, as well as there being investigator triangulation and continual checking back to transcripts. The school types developed on the basis of the data look as if they could be reasonably valid conceptual constructions. The authors explain the approaches they took, which included steps to encourage critical questioning of their interpretations. More detail about the data would be helpful to allow readers to check for themselves the interpretation of (at least) some of the complex array of data on any one school.

Brown, M. and Boyle, B. (1999) Commonalties Between Perception and Practice in Models of School Decision-making in Secondary Schools, *School Leadership and Management***, vol 19, no 3, pp319–30**

Heads of departments' participation in whole-school decision making was found to be related to the structures in place and the willingness of the headteacher to share responsibility. The data led to the formation of three types of school. Type A had regular formal opportunities for heads of department and colleagues from different subject areas to meet, and their departmental priorities correlated closely with the school development plan which was collectively agreed. They were actively involved in whole-school policy and decision making; and the headteacher perceived them as having a whole-school management role. Type C schools had little formal collaboration between heads of department and other staff colleagues, no role for them in whole-school decision making or even consultation.

The survey was based on a random sample of 21 schools based in north west England. Two different semi-structured interview schedules were developed, one for the heads of department

and one for the headteacher. "The headteacher interview was tailored to elicit details of his/her management model and view of the decision-making role of middle management within that model. The middle manager interview probed cross-departmental collaborative opportunities for shared whole-school decision making, planning and systems for evaluation." (pp2–3) These interviews also aimed to elicit perceptions of the management decision-making model in each school. The data was carefully coded to produce categories, themes and conceptual understandings from the data.

Brown, M. and Rutherford, D. (1999) A re-appraisal of the role of the head of department in UK secondary schools. *Journal of Educational Administration*, 37(3), 229–42

This article argues that the consistent message of research and informed opinion is that heads of department can make a difference to school improvement. The article discusses research about heads of department. It does not, however, assess the strength of the research evidence reported in the literature.

Dimmock, C. and Lee, J.K. (2000) Redesigning school-based curriculum leadership: a cross-cultural perspective. *Journal of Curriculum and Supervision*, vol 15, no 4, 332–58

This study attempts to rethink the roles of senior staff and heads of department through the restructuring of schools that the authors believe is necessary for the twenty-first century. It is stated that "surprisingly little is known empirically – as distinct from prescriptively – about how, and by whom, the curriculum is led and managed in schools" (p337). The authors draw on a small number of studies in Australia and Hong Kong to justify their argument that schools must break away from the subject-based arrangements that developed in the late nineteenth century. The authors suggest that schools are bureaucratic and mechanistic, a characteristic deriving from early twentieth century and creating "undermanagement" of the curriculum, which defaults to the powerful subject departments, which "are the linchpin of strong, robust, rigid and bureaucratic organizational structures". The head of department is the central player in curriculum management. Intradepartmental collaboration is strong, interdepartmental collaboration weak. This creates a lack of connectivity across the school, which weakens school effectiveness. If the department is to become an effective element within an effective school then it is necessary to recreate them as teams, with heads of departments as team leaders. This will promote interdepartmental connectivity and weaken bureaucratic rigidity.

Donnelly, J. (2000) Departmental characteristics and the experience of secondary science teaching, *Educational Research*, 42(3), 261–73

The reported study examines how science teachers in English schools construe departmental influences and their impact on the work of teaching. The article distinguishes between an *a-managerial approach* (by the head of department of the independent selective single sex school in the study) which stresses independence of teaching staff; and an *explicitly interventionist* approach (by a new head of department in another, state school). The remaining schools lay somewhere between these two extremes. Attention is also drawn to how four issues (managerial approach; schemes of work; single sciences approach; pupil characteristics) interrelate. For example, the a-managerial approach was found to be manifested in limited attention to schemes of work, supported by a strong sense of disciplinary expertise in the single sciences approach and sustained by pupil characteristics (absence of significant behavioural problems). The article

does not address effectiveness per se. But it observes that the influence of these four factors, including managerial style, on teaching methods and curriculum is problematic: "… the broad practice (observed, in schemes of work, articulated by teachers)… showed, perhaps surprisingly, little variation" (p271). It concludes that pedagogical technique "may show considerable stability for powerful if not easily characterized reasons..." (p272)

The article concentrates on science departments. Data are from a project, Change and Continuity in Classrooms, which focused on science and history. The study included a broadly representative sample of six secondary schools. The article is based on 35 interviews (with 31 teachers) and 39 classroom observations. Around five teachers were selected and interviewed and observed teaching in each school, reflecting a range of professional backgrounds and including the head of department. The findings are reasonably robust. More discussion and data on each school would have added to the insight given.

Elliott, B., Brooker, R., Macpherson, I. and McInman, A. (1999) Curriculum Leadership as Mediated Action. *Teachers and Teaching: theory and practice*, vol 5, no 2, pp171–85

Aspects of the school context that the teachers claimed to influence their levels of participation in curriculum leadership [were] a non-threatening atmosphere, an emphasis on learning and learners in the school, budget support for curriculum initiatives, well-developed communication networks and administrative support for curriculum initiatives (p178). "When conditions in the school are such that the organisational structures, the social dynamics and images of curriculum are empowering for the teachers, and they feel confident, valued and trusted, then that teacher is likely to engage in significant levels of curriculum leadership in action. … it is not a linear causative explanation of curriculum leadership action that is proposed here. Instead it is one with cyclic relationships involving selves, school cultures and action." (p180)

A quantitative postal survey with a stratified sample of teachers in state government funded schools in Queensland, Australia, 109 primary and 20 secondary. "The teachers were asked to provide brief biographical data, indicate the extent of their involvement in curriculum leadership action … the extent to which school-related factors were significant in influencing their engagement in curriculum leadership and the extent to which a range of psychosocial factors are significant influencers." (p176–77) 1,510 questionnaires were returned, 823 from primary teachers and 687 from secondary teachers.

Flecknoe, M. (2000) The role of the curriculum coordinator in primary schools: a radical re-examination. Paper presented at BEMAS Research Conference, Cambridge, March

"The conclusion reached is that the idea of a subject leader in a primary school has run its course and should be abandoned to be replaced by a more effective way of monitoring and improving instruction in primary schools." (pp1–2) This conclusion was based on the finding that the co-ordinators had little time or opportunity to visit other classrooms, felt they knew a lot but could influence little and had no line management responsibility for the teachers they worked with. Other teachers obviously valued their input because they asked for help but this did not impact on the co-ordinators opinions of their effectiveness.

The study involved interviews with two subject leaders over a period of two terms, they were both literacy coordinators. In each case the subject leader was interviewed by a researcher who was not the author of this paper, on about 10 occasions for an hour at a time. They were being offered an opportunity to talk about their work to a sympathetic ear and tape recorder, a non-

directive interview approach. Each interview was then transcribed from the tape and analysed on NUD*IST. (p9)

Glover, D. and Miller, D. (1999) The working day of the subject leader and the impact of interruptions on teaching and learning in secondary schools, *Research in Education*, no 62, pp55–65

The study investigated how subject leaders use their non-teaching time in secondary schools. This is placed in the context of changing views of subject leaders – emanating from TTA and Ofsted and their focus on subject leaders' role in promoting, facilitating and monitoring work. Heads of department have traditionally been seen as an administrator and professional equal in a team of other professionals. Over the past decade the emphasis has changed to that of leaders and change agent and to attributes of leadership, including staff development, monitoring and evaluation. One of the authors' conclusions is that "When the results are considered against other evidence (Glover et al 1999) it appears that subject leaders in those schools which have developed management structures with a focus on teaching and learning are more likely to concentrate on leadership activities than those with 'traditional' heads of department who are still seen as managers and administrators." (p57) Amongst the findings is a time-map of subject leaders' activities concerned with subject leadership; average time on activities associated with subject leadership is 2hr 24 mins:

- interaction with subject staff (61 mins)
- work associated with teaching and learning (39 mins)
- strategic and whole-school issues (26 mins) (mainly part of regular pattern of pastoral and dept meetings)
- resource management (11 mins)
- administration tasks (7 mins)

Interruptions were a notable feature of their daily pattern. The authors suggest that tension between support of subject staff and apparent infringement of professional autonomy continues, with subject leaders either unwilling or unable through lack of time to become involved in observing, monitoring and developing work of colleagues.

In 1997/98 students (associate teachers) completing a PGCE at Keele University undertook work shadowing of subject leaders in 23 of the secondary schools in which they were working. Observation was followed by interview. Days chosen were when normal timetabling was being followed, although there were complications because of fieldwork, year activities etc. The result is a reasonable sample of days to shadow within acknowledged constraints of picking 'normal' days and other caveats (eg the difficulties of classifying activities are acknowledged). It is not a representative sample of schools (eg as the authors highlight they are all schools with a commitment to postgraduate training and so display a high proportion of time being spent observing associate teachers).

Glover, D., Gleeson, D., Gough, G. and Johnson, M. (1998) The Meaning of Management: The Development Needs of Middle Managers in Secondary Schools, *Educational, Management and Administration*, 26(3), 279–92

The reported research is concerned with the way in which downward delegation of operational responsibility from senior levels has created the role of middle managers and aimed at considering how appropriate training can be provided to enhance effectiveness and efficiency at this level. The role of middle managers comprises: securing educational improvement (which tends to be limited); bridging and broking (channel of communication from senior levels to chalkface); subject administrator (this is how middle managers still generally define their role); formal monitoring and evaluation of classroom work (evident in four schools, though in all they are expected to motivate, support, develop staff; evidence indicates this role is fraught with difficulties); management of finances, stock, resources (most readily understood function on middle managers). Some subject leaders have 'bespoke' roles with additional whole-school functions.

With regard to involvement of middle managers in whole school policy-making, middle managers see a clash between this and line management system. But the authors also suggest that status- and power-based recognition is complicated by multiplicity of tasks, blurring of middle/senior management by use of as hoc teams and accretion of tasks, and the fact that recognition of middle management is through "individually negotiated combination of financial, time and status rewards" only "marginally linked" to exercise of professional judgement, owing more to administrative convenience.

A recurrent theme in interviews was that "effective teaching and learning depends upon the ability of middle managers to motivate, inspire and support teams of staff" (p285). The paper concludes by highlighting four characteristics of the changing role of middle manager of which middle managers are aware:

- change from administration to management and leadership
- downward delegation of aspects of whole-school organisation
- increasing responsibility for monitoring and evaluation
- interpretation of change initiated by senior management.

The research was carried out in seven secondary schools in the West Midlands, UK from September 1996 to May 1997. It involved:

- standardised structured interview with a cross-section of five staff
- all standard-scale staff completed a management audit which assessed their perceptions of leadership skills of their pastoral or subject leaders
- all middle managers completed a questionnaire which investigated their perceptions of their own professional development needs as individual teachers, as managers and as contributors to the strategic development of the school

Detailed data from the questionnaire given to middle managers and management audit are not reported. This limits the capacity to assess the validity of the data. On the other hand, the data are quite rich in that they offer the possibility of triangulation which presumably the authors had regard to. The findings are likely to be reasonably robust.

Lunn, P. (1998) The whole school development of the role of the subject leader, in the context of an impending Ofsted inspection. Paper presented at BERA, Belfast

The study looked at the impact of an impending Ofsted inspection on the perception of their role by the subject co-ordinators in one primary school. The teachers were aware of their responsibility for monitoring their subject. This was taken in the school as being the monitoring of resources, pupil achievement and teaching and learning through observation. This driving force for the model was the Head. However the coordinators were still concerned about entering another's classroom despite recognition that the experience was a good learning opportunity for all parties involved and the coordinators did not view it as threatening when they were themselves observed as classroom teachers.

This is a case study from a single school in which "six subject leaders were invited to take part in semi-structured interviews. The subject leaders were chosen to represent core and non-core subjects and from early, mid and late career. All were interviewed once before the Ofsted inspection and once afterwards." (p2)

Metcalfe, C. and Russell, S. (1997) The Role of Subject Leaders in Monitoring the Work of Teachers in Secondary Schools: the Quest for Consistency? Paper to BERA, York, September 11–14

This paper suggests that the culture of secondary schools in the late 1990s was one of "relaxed academic federalism", in which teachers' expectations of professional autonomy was balanced against the need for consistency across classrooms and subjects as the children moved around the "production line" of separate, specialist subject classrooms. They suggest that the secondary school can frequently resemble a federation of semi-independent, loosely-coupled departments.

The research studied twenty three schools whose Ofsted reports had demanded stronger and more systematic monitoring of teachers' work, to see to what extent this demand was met in the school action plans and in practice. Senior staff and heads of department in all schools were interviewed. The findings suggest that heads of department have to act simultaneously as agent of the senior staff and representatives of their federated department. Headteachers reported that their heads of departments were prepared to report departmental problems to the head but not to deal with them themselves, so denying themselves a leadership role. Heads of departments themselves were wary of taking on a monitoring role, especially if the staff was stable and the departmental record good. They sought to consider monitoring in relation to a perceived collegial culture within their departments, and would only view monitoring in terms of collective learning and sharing expertise, which some "quite liked" the idea of achieving. But it could not operate as some sort of quality control. Nor could they accept the idea that they would be going in to monitor classroom performance on some kind of "expert" basis. However, the shifting expectations of heads of department to see them as middle managers in a tighter bureaucratic structure with an accountability for quality that requires monitoring to be undertaken. However, this is frequently resisted by the heads of departments themselves, and is not always supported by the headteacher. The article suggests that one way of dealing with this might be to create a "link manager" or "liaison officer" between the senior staff and individual departments, and reports one senior teacher who suggested that such a role could be a "kind of hands on approach" which was not interventionist but could look at issues such as pace and differentiation, but "not [as] a threatening process".

O'Neill, J. (2000) 'So that I can more or less get them to do things they really don't want to'. Capturing the 'Situated Complexities' of the Secondary School Head of Department, *Journal of Educational Enquiry,* 1(1): 13–34

The author states that the paper:

- identifies the major features of secondary school subject departments as complex, socially constructed workgroups
- examines how interview data might be used to depict and explore more realistically these 'situated complexities'
- considers implications and possibilities of this form of analysis for the professional development of staff with curriculum leadership responsibilities

The essence of the argument is that "in our haste to find more 'effective' magic bullets to 'improve' schooling 'outcomes', we may end up pursuing these more predictable, homogeneous, generic and seemingly replicable aspects of practice and ignore the uncertain, the difficult to identify, the less easily understood, the idiosyncratic". The interest is not so much in whether or not particular departments have 'strong but flexible leadership', a collegiate management style etc, but "how and why certain leadership and management 'choices' are identified and made". Studies will profit more by taking into account history, politics, culture of the department; experiences, positions, aspirations of its members; and the nature of demands from school, community, education system.

In relation to CPD, the paper concludes that there is a need to avoid abstract, de-contextualised, technocratic CPD, and instead paint full, contextualised pictures that recognise the idiosyncrasies of the local which practitioners need to recognise and appreciate; and allow teachers to develop their own "informed theories of practice" (p29).

The article consists of a discussion of methodology and data presentation. It includes a review of literature on secondary school subject heads. The case argued by the author is illustrated through data from an interview with a head of department – part of "one qualitative approach which has been adopted in a multi-site case study of secondary schools heads of department at work" (p21).

Powell, L. (2001) 'It all goes wrong in the middle': A reassessment of the influence of college structures on middle managers. London, Learning and Skills Development Agency

"If colleges are to respond to new ways of working and if the organisational capacity of the college is to be enhanced to tackle increasingly complex systemic change, then a focus on the status, the management development and the leadership roles of middle managers is timely … Control exhibited through structures acts as the glue that holds many colleges together. Replacing the glue of control with the glue of trust has to start with a reassessment of the critical contribution of middle managers to organisational performance in our present colleges." (p31)

The data were collected via a survey with three focus groups. There is little mention of the methodology or presentation of the data so it is impossible to say how valid the conclusions were.

Ritchie, R. (1997) The subject coordinator's role and responsibilities in primary schools. Paper presented at BERA, York, September

The paper discusses the background experience and attitudes of coordinators, the way they were appointed, the nature of their role and constraints on it. It was found that the "… expectations and responsibilities were not always made clear by headteachers and job descriptions were not always realistic" (pp7–8). The major constraints was considered to be insufficient time to do the job with frequent reference to the lack of opportunities to get into other classrooms. The tension between their teaching and co-ordination role was a concern for many with the primacy they attach[ed] to their teaching role over their co-ordination role [being] clear. (p9) "… few coordinators were using their time for systematic monitoring in classrooms …" (p8)

An opportunist sample of 92 co-ordinators from five LEAs completed a questionnaire. The questionnaires were completed, in most cases, during sessions near the beginning of a course they were attending. "Over half the sample were science co-ordinators, the rest were mathematics or design and technology co-ordinators. … Follow-up semi-structured interviews [were] being conducted with a smaller sample of eight teachers and course tutors. … little difference evident between the responses from the three different subject areas covered, nor [were] there major differences between the LEAs involved (including urban and rural settings)." (pp2–3)

Smylie, M. (1992) Teachers' Reports of their Interactions with Teacher Leaders concerning Classroom Instruction. *Elementary School Journal*, vol 93, no 1, pp 85–98

This was a survey of elementary school teacher leaders within one American school district and their relations with their teacher colleagues. It carried out a statistical analysis of the impact of six variables which were taken to define the social context of the school: teacher participation in school decision making; openness of expression among the teaching staff and between the teaching faculty and administration; teacher work group co-operation; teachers' exchange of new ideas about instruction; principals' emphasis on goals; and principal's working relationships with the teachers. The author found that six variables defined the teachers' beliefs about their professional relationships: norms of professional equality, professional accountability, and privacy; opposition to peer judgement; a belief that giving and receiving advice imply status differences; and a belief that receiving advice implies obligation. In addressing these, opportunities to meet and talk are a necessary but not a sufficient condition for teacher/teacher leader interaction to develop The author states that "in all, these findings suggest that if interactions between teachers and teacher leaders are to be encouraged, policy-makers must not only deal with issues concerning the structure of new leadership roles and opportunities for teachers and teacher leaders to work and interact. They are must consider and address teachers' systems of professional beliefs that may mediate and indeed frustrate and compromise the performance and function of these new work roles." (p96)

Turner, C. (2000) Learning about Leading a Subject Department in Secondary Schools: some empirical evidence, *School Leadership and Management***, vol 20(3), 299–313**

The reported study investigated the main methods used by heads of department to improve quality of teaching and learning in their departments and which were deemed most successful. Most heads of department recognised the need to be involved in training and development process of their colleagues. Some appeared to be more proactive and imaginative than others who felt submerged under the weight of whole school issues or administrative demands. Previous heads of department they had worked with were said to be a significant influence, and self-directed learning seemed to be as important, if not more so, than management training courses. The large majority referred to the positive effects of sharing on both a formal level and informally on an almost daily basis. The value of informal meetings was emphasised.

The study consisted of semi-structured interviews with 36 heads of department in four subject areas (English, maths, technology, science) in 10 secondary schools in Wales. The author recognises the limitation that this is only "self-perceptions" (p312). Conclusions are generally confined to what is suggested by the empirical data from this group of heads of department.

Wettersten, J.A. (1994) Low Profile, High Impact: Four Case Studies of High School Department Chairs Whose Transactions 'Transform' Teachers and Administrators. Paper to American Educational Research Association Annual Meeting, New Orleans, April 1994

The reported study investigated the leadership strategies of four exemplary high school department chairs as they attempted to fulfil their extensive responsibilities with limited formal authority. The study is framed within the concepts of transactional and transformational leadership. The author concludes that leadership based on exchange (transactional) relationships not only preserves existing structures and routines but also can stimulate organisational change and teacher-initiated improvements. The complexity of school contexts means that both leadership styles tend to be come blended in leaders' approaches.

The chairs saw themselves as liaisons, buffers, bridges between teachers and administrators. The author concludes that "despite different school environments, the chairs engaged in similar leadership practices" (p13). It was not the financial strength of the school district or strong support of schooling within the community that allowed these chairs to work well. Other chairs in the schools did not have the same reputation as exemplary instructional leaders. These four chairs engage in a complex series of exchanges between administrators, teachers and themselves which facilitate communication, implementation of policies and co-operative relationships. They:

- created informal authority through exchange relationships with their department members and with their administrators in order to successfully accomplish their tasks and see that these relationships satisfied the self-interests of both groups. Informal authority as instructional leaders and middle managers far exceeded their formal authority
- contributed to opportunities for shared leadership between teachers and administrators which transcended self-interests
- were able to integrate individual teachers' interests and concerns with departmental and school cultures in order to create harmony, cohesiveness and vitality within their working environments

The paper also reports the expectations of administrators in schools and teachers.

The study investigated four school department chairs who were:

- in advantageous positions (eg no financial/socio-economic problems in their communities)
- in districts which offered chairs a great deal of administrative responsibility and support in running the instructional programme in their academic areas
- considered exemplary in their jobs by administrators and teachers (ie excellence in working with administrators and teachers and in departmental leadership and credibility as a good teacher)

The data generally support the conclusions and interpretation.

Wikeley, F. (1998) Dissemination of Research as a Tool for School Improvement? *School Leadership and Management*, vol 18, no 1, pp59–73

This paper examines issues related to the dissemination of educational research by evaluating the process of dissemination used by which the consortium involved in the research on effective departments reported by Harris et al. This was carried out through meetings at which heads of department who had been judged effective made presentations to an audience. There is no discussion of how the data were collected, but it may be inferred that they were derived from semi-structured interviews with heads of department who had attended the meetings. The paper itemises the key characteristics of effective departments identified by Harris et al, and points out that effective departments had a strong influence as normative models of effective departmental leadership. It notes that those listening to the presentations noted a tension between the simultaneous emphasis on collegiality and strong leadership, and also found certain departments being declared "effective" a divisive act. The author found that what appeared to the research team to be a rational-empirical approach to dissemination, with findings being reported clearly to an audience, was instead frequently seen as a power-coercive approach by that audience, as the findings appeared to be presented as job descriptions for effective departmental management. The presentations placed considerable emphasis upon describing the characteristics of their departments, rather than exploring the research evidence that might enable the audience to recognise those characteristics. The author comments that "without the research evidence to relate to, they [ie the audience] might have more difficulty defining their effectiveness. The list of common characteristics of effective departmental practice had become the absolute measures of effectiveness." (p67)

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, pp183–95

This paper reports on a survey of heads of academic departments or areas in secondary schools. It provides data on how heads of department perceive their role and what they see as the key influences upon their work. It analyses data from six different categories of staff: heads of large single subject departments (eg maths), closely related departments (eg science), heads of associated subject areas (eg humanities); cross-curricular co-ordinators (eg ICT); others, and headteachers. The study characterises these staff as "middle managers", not as leaders, although by the date of publication the TTA standards for "subject leaders" had been published.

The data demonstrate how understandings of the role of the head of department had developed since the 1988 Act. There was a greater acceptance of the role as "middle manager", in

particular in relation to the management of staff, but problems of time and resources remained the same. The authors divide the work of middle managers into four areas: academic, administrative, educational and managerial. There was broad agreement between the headteachers and the heads of departments about their responsibilities in the academic and managerial areas: only in respect of ensuring continuity of education for students was there any statistically significant difference. The heads of departments accepted that they had a responsibility for monitoring and inducting staff within their department – a major change since the early 1990s. But statistically significant differences were found in the views of heads and heads of department around both administrative and educational areas, with far fewer heads of departments than heads acknowledging any responsibility for the four educational tasks selected for the survey – monitoring student progress, organising testing, arranging teaching groups and implementing a homework policy. It may be that homework issues were seen as the responsibility of individual teachers, and continuity may have been seen as a pastoral responsibility.

The heads of departments were asked about the influences on their practice in relation to four specific decision areas: curriculum management, resources, professional development and pupil discipline. In all cases the most significant influence by far was seen to be their departmental colleagues, with senior staff the second most important influence, though much less important, and students third. Factors internal to the school were generally far more important than external influences, but on specific areas some external influences were acknowledged as significant, and sometimes internal influences became much more important. In relation to curriculum decisions, students rose greatly in importance as an influence, and LEA advisers were also an important influence, as they were on staff development issues and resource questions – perhaps as sources of information about current developments and opportunities.

Witziers, B., Sleegers, P. and Imants, J. (1999) Departments as Teams: functioning, variations and alternatives, *School Leadership and Management,* 19(3), pp293–304

Taking the results of a number of studies as a starting point, "this article describes the functioning, the variations and the desirability of subject departments in secondary schools". The role and function of departments are described in terms of decision making, collaboration, consensus and leadership. Dutch researchers, the article indicates, have found profound differences between subject departments. But the paper also points out that other factors interact with subject. For example, the level of joint planning is not so much influenced by subject as by the value placed on this by school management and by existing values and norms within departments and schools. Research results show, it is suggested, that educational leadership, position of department chairs and collaboration between department members are related.

The article draws mainly from Dutch research on departments and attempts to synthesise their findings. Methodological details of the studies are not presented or assessed.

Appendix 4

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