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# The development of middle leadership in schools in Wales

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# Contents

# 1. Introduction

This policy study is part of the Tri-Nations Collaborative Development Project on Middle Leadership involving Education Scotland (Scottish Centre for Educational Leadership), Centre for School Leadership in the Republic of Ireland and National Academy for Educational Leadership Wales. Initial work traced the evolution of middle leadership in the Irish and Scottish education systems (Forde *et al.* 2019). Subsequently, a symposium of staff and associates from the three leadership development centres was held in Maynooth, Republic of Ireland, exploring the role and development of middle leadership in each education system (Forde 2019).

This report presents the findings of a policy study on the development of middle leadership in schools in Wales. The research aims were as follows:

- To analyse policy to map out the way in which 'middle leadership' has developed in schools in Wales.
- To examine the implications of the evolution of 'middle leadership' for the future development of this level of leadership.
- To identify areas for the professional learning to support the role of middle leaders in school in Wales.

The report begins by drawing on selected academic literature to provide a critical commentary on a number of themes that emerged from the policy analysis.

- 'Leadership at all Levels': Implications for Middle Leadership
- The Practice of Middle Leadership: Development,  Collaboration and Improvement
- Curriculum Leadership and Middle Leadership
- Building Middle Leadership Capacity through Professional Learning

The report then presents the findings of the detailed analysis of a wide range of recent Welsh education policy. The study and methods used to investigate policy descriptions of middle leadership in schools in Wales are in the appendix.

# 2. Summary: Key Issues for Middle Leadership Development

This section provides a summary overview of the the report.

## Section 3: 'Leadership at all Levels': Implications for Middle Leadership

The three current policy frameworks, *The Professional Standards for Teaching and Leadership (PSTL)* (WG: 2017a), *Schools in Wales as Learning Organisations (SLO)* (WG 2017b) and *A Curriculum for Wales (CW)* (WG 2015a), present leadership as central to achieving the purposes and aims of Welsh education in a context of significant reform.

- There is little specific reference to middle leadership but instead the keynote of several documents is the idea of 'leadership at all levels'.

- There are competing constructions of leadership implicit in the various policy documents which have implications for middle leadership. These are: distributed leadership, learning leadership, transformational/transformative leadership and social justice leadership. There is little consideration of curriculum leadership.

## Section 4: The Practice of Middle Leadership: Development, Collaboration and Improvement

There was limited reference to middle leadership/leaders in the policy documents. Where there were references, these largely related to the role of middle leadership in building and sustaining collaboration and in strategies related to quality and improvement.

Key aspects:

- Defining middle leadership as connecting through the middle

- Building and contributing to collaborative practice

- Balancing working with a community of practice and ensuring a whole school perspective

- Skills and understanding in leading improvement in teaching and learning

- The practice of middle leading, practice architectures and 'practice-bundles'.

## Section 5: Curriculum Leadership

Leadership is positioned as a key element in the reform programme, *Curriculum for Wales* (WG 2015a). From the policy analysis, concerns were noted about the skills and understandings of middle leadership in this area.

- Curriculum leadership draws from other forms of leadership: distributed, learning leadership and social justice leadership.

- Curriculum leadership for middle leadership comprises two elements: (1) skills and understandings in curriculum design, development and implementation and, (2) skills and strategies to build teacher expertise and engagement in curriculum design, development and implementation.

- Inquiry approaches to curriculum development is a useful set of strategies for curriculum development.

- Models of curriculum leadership can be adapted for middle leadership, notably Brundrett and Duncan (2011).

## Section 6: Building Middle Leadership Capacity through Professional Learning

Increased emphasis on professional learning and development is evident through *The Professional Standards* (WG 2017a) and *Schools as Learning Organisations* (WG 2017b). Further, issues related to leadership development opportunities and the need to build leadership capacity were key themes in the policy analysis.

Critical areas for middle leadership professional learning include:

- knowledge, skills, capacities that need to be developed in both aspiring and serving middle leaders
- the development of teachers' role and identity as a middle leader and the challenges of placing the perspective of the team with addressing whole school priorities
- developing skills to enable middle leaders to contribute to firstly, the development of others, particularly the teaching and leadership of teachers and secondly, the improvement of the organisation and education system
- flexibility and access are important with consideration given to different professional learning opportunities: course-based programmes; experiential learning through mentoring and coaching; enquiry methodologies; participation in school development and practice-based learning combining cycles of action and reflection.

In setting an agenda for middle leadership professional development, there are a number of issues which need to be considered in looking to strengthen middle leadership development.

- Expectations need to be clear at a system and school level about professional responsibility for individual capacity building in leadership and professional practice.
- The work of middle leaders is heavily dependent on how their roles are constructed. [Too many people in leadership roles are not leaders, do not have an expectation of being a leader, and do not have the organisational support to be leaders.]
- Senior leadership also needs opportunities to develop skills and understandings to enable them to support the development role of middle-level leaders in school.
- Middle leaders have a responsibility to develop their own leadership capacity through training, development and experience.
- There is a question whether some middle leaders need to be convinced of the value of leadership development.
- In current economic climate consideration could be given to building capacity across the system through work shadowing and reflection, peer coaching.

## Section 7: Detailed Policy Analysis

From the policy analysis four themes were identified:

- Leadership at all levels
- Professional learning
- Teaching and learning: quality and outcomes
- Leadership teams, structures and processes.

# Section 3: Leadership at all Levels: Implications for Middle Leadership

### 3.1 Current Policy

The three current policy frameworks, *The Professional Standards for Teaching and Leadership (PSTL)* (WG: 2017a), *Schools in Wales as Learning Organisation*s (SLO) (WG 2017b) and *A Curriculum for Wales* (CW) (WG 2015a), present leadership as central to achieving the purposes and aims of Welsh education. The development of middle leadership is against a backdrop of significant reform in education in Wales (OECD, 2017) and includes enhancing teachers' skills and understanding, the development of schools as learning organisations (OECD 2018; WG and RSIC n.d.) and large scale curriculum reform (WG 2020). There is little specific reference to middle leadership but instead, a recurring theme is the idea of 'leadership at all levels'. There are competing constructions of this idea of leadership at all levels' which, it could be argued, complement one another. In this section we tease out these different constructions and consider the implications for middle leadership.

### Table 1: Aspects of Current Policy

| Policy | Aspects Analysed |
| --- | --- |
| *The Professional Standards for Teaching and Leadership (PTSL)* | Standard for Leadership<br>Standard for Collaboration |
| *Schools in Wales as Learning Organisations (SLO)* | Promoting team learning and collaboration among all staff<br>Modelling and growing learning leadership |
| *A Curriculum for Wales (CW)* | Inspiring leadership. |

### 3.2 Distributed Leadership

Harris and Jones (2010) note that distributed leadership covers both formal and informal leadership and is evident in the *PSTL* (WG 2017a) with the distinction between formal roles of leaders and teachers exercising leadership. Reflecting Gronn's (2009) discussion of mixed leadership patterns, there are two dynamics. First there is 'distributive leadership' where, as part of their practice, formal leaders create opportunities for teachers to exercise leadership in different ways across a school: "*distribute leadership and help grow other leaders...*" (WG 2017b: n.p.). Distributive leadership is vital for creating the conditions for teachers to engage in collaborative practice: "*Staff learn how to work together as a team*" (WG 2017b: n.p.). Thus,  formal leaders are expected to be *"empowering others"* (WG 2017a: n.p.)  in a context where leadership exercised by teachers is a planned and resourced process: "*The school allocates time and other resources for collaborative working and collective learning*" (WG 2017b: n.p.). Formal leaders provide opportunities for the exercise of distributed leadership by teachers, but also hold teachers to account for this by exercising *"corporate responsibility in all colleagues"* (WG 2017a: n.p.).

Distributed leadership points to the expectation that all teachers exercise leadership: "*embedding the curriculum successfully will require all practitioners to be leaders of learning in the classroom and to collaborate with others to lead their own professional learning*" (WG 2015a: 26).  Teachers exercise leadership through "*leading colleagues, projects and programmes*" (WG 2017a: n.p.). Mirroring this, teachers must take *"responsibility for self"* (WG 2017a: n.p.).  This balancing of development and accountability is evident in the new curriculum development:  "*With this freedom comes a new responsibility and accountability – on practitioners and critically on school leaders*" (WG 2015a: 26). Developing new curricula programmes in their school contexts is a significant task for middle leadership.

## 3.3 Learning Leadership

The term 'learning leadership' is used in *SLO* (WG 2017b) and reflects a substantial area in the literature where various terms are used: 'leadership for learning' (MacBeath and Dempster 2009), instructional leadership (Blasé and Blasé 2000) and pedagogical leadership (Robinson *et al.* 2008). What these various constructions have in common, is the central place of teaching and learning in the role and activities of leadership. Teacher leadership is frequently used as a synonym for this form of leadership emphasising the engagement of teachers in the development of teaching and learning (Murphy 2005). However, this is a form of leadership this can be exercised by all levels of leadership across a school.

In the Welsh policy frameworks, school leaders are expected to be *"modelling and growing learning leadership"* (WG 2015a) to enhance pedagogy. In *PSTL* *"pedagogy is paramount"* (WG 2017a: n.p.), specifically the standard for leadership is *"helping effective pedagogy to grow"* (WG 2017a: n.p.). Learning leadership is about improvement and quality where school leaders bring about change with *"a strong focus on improving learning and teaching"* (WG 2017b: n.p.). Learning leadership is developmental with school leaders expected *"to build the confidence and competence of all practitioners to achieve better learning and higher standards for all their learners"* and *"[c]ollaborative working and collective learning […] are focused and enhance learning experiences, learner outcomes and/or staff practice* (WG 2015a: 26).

## 3.4 Transformational Leadership to Transformative Leadership

In a period of significant educational change, school leaders are to be *"proactive and creative change agents"* (WG 2017b: n.p.) ensuring that *"the school is characterised by a 'rhythm' of learning, change & innovation"* WG 2017b: n.p.) and so leaders arguably, need to engage in transformational leadership (Bass 1990: 22). Bass' definition highlights the place of vision and values in change programmes. Thus, in *CW* (2015a: 7) one of the four enablers of change is vision and values **"***Effective and inspiring leadership throughout the system will be essential if we are to realise our vision*" and in *SLO "school leaders ensure that the organisation's actions are consistent with its vision, goals and values"* (WG 2017b: n.p.). Additionally, in *PSTL*, for teachers in formal leadership roles, inspiration is about influencing others: they work to *"intelligently to bring coherence, clarity and a shared commitment to realising the vision for pedagogy, learners, colleagues and the wider community"* (WG 2017a: n.p.). The idea of transformational leadership is evident also in staff collaboration, *"Trust and mutual respect are core values"* (WG 2017b: n.p.) which is deepened through meaningful professional learning: *"Staff reflect together on how to make their own learning more powerful"* (WG 2017b: n.p.). The emphasis is on building a collaborative developmental culture to realise transformation: *"school leaders develop the culture, structures & conditions to facilitate professional dialogue, collaboration & knowledge exchange"* (WG 2017b: n.p.) and is equally significant in areas of responsibility led by middle leadership.

The notion of transformational leadership underlines the significance of the leadership of change. More recent discussions have explored the nature of the changes needed in education, where through 'transformative leadership' (Shields 2017), issues of equity are tackled. This thread is evident in ideas of 'social justice leadership'.

## 3.5 Social Justice Leadership

There is a growing body of work around social justice leadership (Angelle 2017) as schools seek to address the learning needs of increasingly diverse groups of learners. While there is no specific mention of issues related to social justice, there are some references that help to surface its importance for middle leadership. As part of the vision of effective teaching and learning, ideas about social justice are implicit in the requirement to address the different learning needs and foster the achievement of *all* learners. Thus, formal leaders are expected to *"… ensure an integrated approach to responding to learners' learning and other needs"* and *"to promote excellence and high expectations for all learners"* (WG: 2015a: 26).

## 3.6 Curriculum Leadership

The curriculum reform programme has significant consequences for schools in terms of the design and development of new programmes: *"Our new curriculum will give schools far more freedom to determine what is taught"* (WG 2015a: 26). However, there is no real development of the idea of curriculum leadership in these policy documents. [This will be discussed in Section 5].

# Section 4: The Practice of Middle Leadership: Development, Collaboration and Improvement

## 4.1 Middle leadership: a complex concept

Research into middle management/leadership in schools in Wales in the 1980s and 1990s tended to be part of studies covering both England and Wales. There is only a limited literature dealing specifically with middle leadership in schools in Wales (James and Hopkins 2003; Turner 1996, 1998, 2000, 2003a,b; Turner and Sykes 2007). Early interest focused on exploring the experiences, the types of tasks and responsibilities undertaken by middle management in secondary schools. Sammons *et al.* (1997) drew attention to the contribution of subject departments in secondary schools to overall school effectiveness. Subsequent studies of middle management/leadership in secondary schools were concerned with effectiveness and improvement.

Investigations into the role and practice of subject leaders by Hamersley-Fletcher (Hammersley-Fletcher 2002; Hammersley-Fletcher and Brundrett 2005; Hammersley-Fletcher and Kirkham 2007) reveal some of the tensions around middle leadership with specific reference to the primary sector. Tensions were noted between the building of a collaborative culture and communities of practice alongside a management hierarchy of which, middle leadership is a part (Hirsh and Bergmo-Prvulovic 2019). Busher *et al.* (2007: 418) notes that middle leaders construct and change their work-related identities as they gain more experience and as expectations change. Recent studies have investigated other dimensions of middle leadership. The strong alignment between middle leadership and learning is one facet (Leithwood, 2016). Attention has also been paid to the definition of 'middle leadership' with De Nobile (2018) building a theoretical model. One of the most dynamic areas is a body of work on 'middle leading' drawing on ideas around 'practice architectures' (Grootenboer 2018).

In the following sections we draw on this body of work on middle leadership to consider the two areas of concern from the policy analysis:

* *Building collaborative practice: challenges in the role of middle leadership*

* *Practice and improvement.*

## 4.2 Building collaborative practice: challenges in the role of middle leadership

One of the issues to emerge from the policy analysis, is the lack of specificity about the role, responsibilities and practice of middle leadership. Busher *et al.* (2007: 406) note a wide range of roles and responsibilities that might be included in the broad term of 'middle leadership'. Further, in the primary sector the difference between teacher and middle leadership is blurred. Various studies explore the positioning of middle leadership within school structures and the relationships middle leaders have to forge with both the staff they lead and the senior management to whom they report. These challenges are intensified because it is unclear to whom the term 'middle leadership' applies. Forde *et al.* (2019) argued for a distinctive role of middle leadership in making connections through the middle of the school horizontally with other middle leaders and vertically, connecting whole school concerns with classroom realities, senior leadership with classroom-based practitioners and practitioners in pastoral care and support.

The policy analysis highlighted collaborative practice as central to Welsh education policy. Middle leadership is an important connective point in building collaborative practice but there is a tension between the need to foster collegiality and maintain a clear accountability role. Hirsh and Bergmo-Prvulovic (2019) illustrate the negative reactions from colleagues experienced by teachers moving into middle leadership roles, issues that are not simply related to the early stages of becoming a middle leader but are endemic to the role. This is also evident in Hammersley-Fletcher and Kirkham's (2007) study who report on the challenges faced by middle leadership when working with other members of their community of practice; whether their role is to 'protect' this community of practice against whole-school requirements or to hold members to account in relation to school priorities. Balancing these competing expectations is critical to middle leadership practice in order to maintain connections with their community of practice, the wider school and, in line with policy expectations, with other schools.

## 4.3 Practice and improvement

Irvine and Brundrett (2019) argue that we should not characterise middle leadership as a teaching role with some leadership duties. The policy analysis highlighted that in all sectors middle leadership had a significant role in school improvement processes. However, a recurring concern across the Estyn Annual Reports, related to the quality of work and commitment of middle leadership in leading school improvement processes. A lack of skill and understanding was highlighted in areas such as improvement planning, monitoring practice and outcomes, data analysis, evaluating pupils' learning experiences. It is here that the balance between building collaborative practice and accountability comes into play and raises questions about the nature of the practice of middle leadership.

Turner and Bolam (1998), in one of the few studies on subject leadership in Wales, propose a model of the work of subject leaders in teaching and learning. Set in a context of the wider system and policy factors alongside the context of the department and subject, Turner and Bolam identify the tasks and methods used by subject leaders. This model provides a broad framework for subject leadership, but we need to consider not just the tasks but the process of middle leadership. The complexity of this leadership role in the middle of the school, necessitates leaders being able to work with different groups, balance sometimes competing demands and expectations and ensure high quality teaching and learning. Further, middle leadership is much wider that subject leadership. Recent studies, drawing on the work on 'practice architectures' (Kemmis and Grootenboer 2008) have begun exploring the idea of 'middle leading'.

Grootenboer (2018: 108) describes middle leading practice as "prefigured but not preordained - it is enabled and constrained by prevailing arrangements and conditions in the site, but not predetermined". Practices are formed by "being in and participating in the social world as they are enacted, composed and developed" (Grice 2019: 165) within the contexts of schools. Grootenboer (2018: 107) proposes that "practice architectures are enabling/constraining conditions that shape practice in cultural–discursive dimensions, material–economic dimensions, and social–political dimensions". The cultural–discursive dimensions are characterised as 'sayings' and are concerned with the language and meanings characteristic of the role; the material-economic dimension relates to 'doings' and is concerned the activity and work of a specific role within a particular space and time; social-political dimensions are the 'relatings' that are intrinsic to the role, and which are shaped by structures, relationships, power and accountabilities and access to the resources needed to build these relationships.

This construct of leading through sayings, doings and relatings is particularly important in underlining the leadership role as opposed to the management and administrative roles of middle leaders particularly around leading pedagogy. Grice (2019) notes that there are substantial challenges for middle leadership in looking to distribute and exercise pedagogical leadership. However, Edwards-Groves and Rönnerman (2013) propose these practices of sayings, doings and relatings come together in what they describe as 'social projects' for example, professional learning or teaching. Each of these 'practice-bundles' are intertwined with other bundles, with one set of practices connecting with other sets of practice. An example would be the interdependence of collaborative professional learning and the practice of teaching in the classroom. These practices seem to be particularly important in a context of significant educational change and help point up areas for the development of those middle leading: practice-bundles around, for example,

- reviewing pedagogic practice
- scrutinising learning outcomes
- delivering professional learning
- designing and developing new curricular programmes.

There is little discussion of curriculum leadership including the role of middle leadership in designing, developing and implementing the curriculum reforms. We now explore the issues related to curriculum leadership.

# Section 5: Curriculum Leadership

## 5.1 The re-emergence of curriculum leadership

Curriculum leadership is an aspect that has only recently re-emerged as systems take forward curriculum change. Wales is in the process of systemwide reform of the curriculum and although this form of leadership was not evident from the policy analysis, it is a pertinent issue for this report. As schools design their own curriculum and assessment arrangements to take forward the *Curriculum for Wales* (WG 2015a),  leadership is positioned as an essential element: *"the role of leadership in enabling high-quality learning and teaching. Establishing a high-performing education system through high-quality learning and teaching depends on building its professional capacity, developing local leadership, responsibility and decision-making"* (WG 2020:6).

In order to ensure a coherent and progressive approach to the holistic development of all learners, curriculum leadership relates to subject/disciplinary leadership within the 'Areas of Learning and Experience' specified in the *Curriculum for Wales* (WG, 2020) and also to middle leadership roles which have responsibilities for other dimensions, for example social and personal development, pastoral care and guidance, special educational needs, community engagement. Issues have been identified in curriculum leadership by Estyn in both secondary schools and, as illustrated in this example, primary schools: *"The quality of teaching is often inconsistent and teachers do not always meet all pupils' needs successfully. Often, the curriculum is not planned well enough to ensure that pupils acquire the skills they need progressively" (Estyn 2019: 86)*.

## 5.2 Curriculum Reform and Leadership

The changes proposed by Donaldson (2015) and now underway are a radical departure from existing models of 'teacher-proofed' curricular programme design.  Donaldson (2015: 97) noted the significant implications for teachers and school leaders in being able to take forward curriculum reform creating challenges for "leaders at all levels". Work in the Pioneer schools points to the significance of effective leadership both at senior and middle levels (WG and NFER 2014). It is useful here to consider these challenges specifically from the perspective of middle leadership in schools. A wide range of leadership skills and understandings are needed to take forward this programme of reform. However, there is limited mention of the curriculum, particularly curriculum design and development.

## Table 2: Curriculum for Wales: Challenges for Leadership

| Challenge in CW | Areas of Practice to be developed and sustained through middle leadership development |
|---|---|
| "Greater freedom will offer opportunities for creative decision making about the kind of curriculum that will best meet the needs of the children and young people in the school." (p. 97). | Fostering interest and skill in curriculum development among teachers.<br><br>Creating contexts and projects which will enable teachers to review needs and make decisions in relation to the design and delivery of the curriculum.<br><br>Planning and leading inquiry, action-research, curriculum inquiry activities. |
| "Improving the quality of teaching and learning and ensuring consistent high quality will continue to be important". (p. 97) | Making links between curriculum design and effective teaching and learning approaches.<br><br>Maintaining a focus on improvement in practice (an area of raised as a concern by Estyn). |
| "Inspiring, coaching and supporting staff in realising the new possibilities will be a critical task of leadership". (p. 97) | Using experiential professional learning to develop teacher confidence and expertise in leading and contributing to change.<br><br>Fostering an ethos of 'can-do' in relation to change. |
| "Tests of success will be different, with new accountability measures and greater expectations of self-evaluation". (p. 97) | Using skills of self-evaluation and reflection in to own role as a middle leader<br><br>Building teachers' skills in self-evaluation cycles of action and reflection |

| | |
|---|---|
| "The likelihood of success will be enhanced by an increase of collaboration within and between schools, joint planning, sharing good practice and rigorous moderation of assessment. Skills associated with the ability to lead in a partnership arrangement, share resources and negotiate will be essential" (p. 97). | Using collaborative skills to create genuine opportunities for teacher participation and leadership. Creating and sustaining projects and activities for co-constructing and sharing curriculum development. Using skills in teamwork, negotiation, conflict resolution to support cross school development Developing skills of collaboration with staff. |
| And, critically, leaders will have to make sure that parents and carers understand, are convinced by and supportive of the new curriculum and assessment arrangements, and that their children will not be disadvantaged by the process of implementation (p. 97). | Demonstrating the importance of parents and carers Communicating effectively with parents and carers Fostering participation. |

## 5.3 Scoping Curriculum Leadership

DeMatthews (2016) argues that curriculum leadership can draw from three other forms of leadership which to a greater or lesser degree are evident in Welsh policy documents: distributed leadership, instructional leadership (learning leadership) and social justice leadership. Therefore, middle leaders leading and contributing to the curriculum reform programme will exercise distributed leadership by building teams and fostering collaboration in which teachers are responsible for areas of development. In addition, middle leaders will exercise learning leadership through monitoring and evaluation of practice, reviewing outcomes well as through promoting professional learning for teachers. Social justice leadership becomes important in ensuring that the curriculum design, development and delivery leads to high quality teaching and learning experiences that addresses the specific needs of diverse groups of learners. However, there are other dimensions of curriculum leadership that are not covered by these three forms of leadership and which are becoming increasingly important for middle leadership.

Harris *et al.* (2020: 3) referencing the current curriculum reforms in Wales, also highlights the importance of curriculum leadership arguing that the co-construction of the new curriculum has given rise to "different types of curriculum leadership, including subject/disciplinary leadership, pedagogic leadership, as well as wider system/structural leadership". However, Harris *et al.* (2020: 3) relate curriculum leadership to teacher leadership noting that "curriculum reform in Wales has brought new opportunities for teachers to engage with system level change". While this is an important aspect, we should also surface the implications for the role of middle leadership.

## 5.4 Collaborative Practice and Curriculum Development

Brundrett and Duncan (2011) in their study of leadership of curriculum innovation in ten successful primary schools point to the importance of building commitment, a sense of purpose and engagement in the process. Thus, schools were more likely to be successful where, among other factors:

- teachers and school leaders see the potential benefit for pupils, their professional satisfaction and for the school and community as a whole;

- all school personnel are committed to and believe in its underlying values;

- all teachers and leaders are involved in the process of innovation from the initial idea to its implementation and review;

- teachers trust and respect the leadership team;

- all school staff are able to see the benefits and gains made by pupils [...] (Brundrett and Duncan, 2011: 121).

Building engagement and connections vertically between priorities, policy and classroom realities and horizontally across subjects and between subjects and pastoral care and support, is an important aspect of curriculum leadership and so middle leadership is well placed to take this forward. Lee and Dimmock (1999) demonstrate the importance of heads of department in leading staff through processes intended to bring about fundamental change to the curriculum across the school. Similarly, Tam (2010: 380) argues that "[r]estructuring of curriculum and pedagogy in many school systems is difficult without an effective HoD [Head of Department] with vision and expertise in curriculum development". Leadership here is not simply on the basis of subject expertise but looking at the holistic development of diverse groups of learners.

## 5.5 Middle Leadership Leading Curriculum Development

Lee and Dimmock (1999) point to several issues that middle leaders have to address in order to engage teachers in the process of curriculum design and delivery. They make a distinction between the curriculum leadership exercised by the school principal and middle leaders (in this case heads of department): "The heads of department [...] differed from the principal in that they facilitated and helped teachers' as well as adopted practices such as 'consulting, listening then deciding' and 'democratic, collaborative negotiating styles'" (Lee and Dimmock 1999: 473). Further, Tam (2010: 374) found that the leadership exercised by middle leaders demanded "a high degree of committed and flexible leadership that demonstrates clear connexion between the curriculum and the teachers". Building a strong sense of connectedness is part of the task but this department/team needs to be fully embedded in working towards the school priorities. While Lee and Dimmock (1999) found strong links within departments, there was a lack of connecting through the middle, across departments/functions which impeded progress of school wide change.

The three issues highlighted by Sinnema *et al.* (2020) in their discussion of curriculum reform in Wales can be related to middle leadership in their role in curriculum leadership: (1) flexibility, (2) curriculum design capacity, and (3) agency. The first issue, the higher degree of flexibility underpinning the *Curriculum for Wales* allows for considerable devolution in decision-making in curriculum design and delivery and here middle leadership has a role in creating opportunities for greater flexibility while balancing this with a concern for quality of learning experiences, coverage of the broad areas of a discipline and the achievement of all learners.

The second issue relates to the curriculum design capabilities of teachers (including middle leaders). Albashiry *et al.* (2016) found that heads of department facing the task of curriculum development looked for support in the technical aspects of curriculum design and planning. Sinnema *et al.* (2020) also demonstrate the importance of the skills of curriculum design and development. In the examples they cite from Scotland and the Netherlands, the authors note that on the one hand, teachers support the purposes of more flexible curriculum programmes, but on the other hand, there have been challenges around teachers then translating these purposes into curricular programmes. Teachers need to make sense of their role and responsibilities in designing the programmes and then to develop skills in curriculum design and in working collaboratively across the different subject areas or stages of a school. Substantial guidance is being developed to support schools in this work (WG 2020). Middle leadership is a crucial layer of leadership in the translation of this guidance into the planning implementation of the curriculum by building the connections internally across different departments/faculties; stages of the school; between classroom and whole school strategies; between teachers and senior leadership.

The third element Sinnema *et al.* (2020) underline is teacher agency, an important outcome of the reform programme. Therefore middle leadership will have a role in enabling teachers to engage in curriculum development and implementation, building their professional knowledge and expertise in making decisions about pupil learning, while at the same time ensuring coherence and balance in curriculum experienced by learners. In this, curriculum leadership needs to build a distributive approach foster teacher agency and expertise and enable them to take on leadership activities.

## 5.6 Inquiry, Collaboration and Curriculum Leadership

There is an increasing recognition in policy of the importance of the context of the school and classroom in shaping the teaching and learning processes in order to address the learning needs of diverse groups of learners. Larkin *et al*. (2009: 813) highlight repeated efforts to specify curricular programmes externally. However, such efforts to ensure curriculum fidelity "are often frustrated at the level of individual teachers, who modify curricula to meet situational needs in ways that may be at odds with the goals of such reforms". Larkin et al.'s study highlights the severe limitations of externally detailed curricular programmes for teachers to follow rigidly. Teachers making decision about what and how they teach based on the needs of their learners, chimes with Stenhouse's (1975) approach to curriculum development which he characterizes as curriculum inquiry. Stenhouse constructed teaching as a deeply contextualised process. Therefore, the development of the curriculum should lie at the level of the school. Further, Stenhouse (1975:142) characterised a curriculum not as a set of materials and lesson plans but instead as "a particular form of specification of practice", which, through a process of curriculum-inquiry, requires each teacher to test, verify and adapt this specification within the context of their classroom.

Professional collaborative inquiry has been a useful tool in the development of the *Curriculum for Excellence* in schools in Scotland (Drew *et al.* 2016). In a similar vein, Law *et al.* (2010) depict the processes of curriculum development using curriculum development teams who worked through a three-stage model: *Planning, Experimentation and Reflection Model of Changes (PER)*. This model of change goes through action cycles with teachers designing a lesson, trialling the activity in class and then meeting to reflect on the process. Here staff participation is critical and so part of the task of middle leadership is to build engagement and commitment of teachers by building skills, understandings and interest in curriculum development.

These models of systematic enquiry and collaborative development reflect other models of action research and practitioner enquiry such as lesson study and professional learning communities where aspects of curriculum are developed collectively. Such processes could be characterised as the practices of middle curriculum leading, intended to build collective commitment and engagement. Edwards-Groves *et al*. (2016) note the importance of middle leadership building relational trust in taking forward such practice-bundles. Brundrett and Duncan (2011) provide a more extensive model of curriculum leadership where relational trust is implicit but remains central to successful implementation. At the heart of the model are the experimentational, inquiry processes based on collaboration.  This model is useful in framing the curriculum leadership role of middle leaders.

### Model of Curriculum Innovation: Stages

*Researching*

- environmental scanning
- building on successful work
- research into the range of possible models exchanges etc.

*Ethos building*

- creating an ethos for change - experimentation
- support for NQT, less experienced part of SL/ML responsibilities
- middle leaders are given status and value by the head, reinforced by their inclusion at senior leadership team meetings.

*Trialling*

- trial and review planning format
- build a model of cross-curricular learning
- working in collaboration with other schools.

*Implementation*

- clear and understood timeline
- steps from innovatory idea to implementation
- evolutionary and dynamic change...modified and adapted.

*Evaluation and Review*

- targets in strategic plan and adjustment of innovation.

Alongside these stages are ongoing tasks for school leadership:

- maintenance of a core curriculum and raising standards on literacy and numeracy
- a culture of adult training (Brundrett and Duncan 2011: 122).

Brundrett and Duncan (2011: 123) argue that "[w]ithin the model of curriculum innovation that we present, change is evolutionary and dynamic and proceeds from small, achievable beginnings to more widespread changes which are constantly reviewed, modified and adapted to changing circumstances and requirements". As schools work to build their curriculum, the curriculum leadership of middle leaders is crucial (Edwards-Groves *et al.* 2019). Here there are two important aspects, leading curriculum development teams and the development of skills and understanding in curriculum design and development, both their skills and the skills of the teams they lead.

## 5.7 Curriculum Leadership: Role of Middle Leaders

There are several dimensions to the curriculum leadership of middle leaders: skills and understandings related to:

- the processes of curriculum design and underpinning concepts - issues of content, cohesion, progression, assessment, teaching and learning.

- fostering the expertise of teachers in designing and implementing the new curriculum, creating the essential 'pockets of expertise' (Sinnema et al. 2020, 186) to be shared in individual schools as well as between networks of schools.

- leading curriculum development teams (and subsequently, teaching teams including cross curricular teams).

- building inquiry methodologies as a means of innovating practice and evaluating the efficacy and impact of the design of the programme, content and pedagogy.

# Section 6: Middle Leadership Professional Learning

## 6.1 Professional Learning in Policy

The purpose of the policy study is to help surface the implications for the development of middle leadership and to identify areas for the professional learning to support the role of middle leaders in school in Wales. From the policy analysis, two areas were identified that were relevant to middle leadership professional learning:

- leadership development opportunities for aspiring and serving middle leaders
- building leadership capacity and succession planning in leadership.

From a review of the literature on middle leadership professional learning, we now identify some of the key issues for middle leadership development

## 6.2 Knowledge, Skills and Abilities Required for Middle Leadership

The demands of the middle leadership role has resulted in increasing recognition that middle leaders require focussed, appropriate professional development and support to equip them for the role and ensure their ongoing development. (Adey and Jones 1998; Forde et al. 2019; Irvine and Brundrett 2019; Thorpe and Bennett-Powell 2014; Gurr and Drysdale 2013).

Excellence in pedagogical practice is recognised as one important aspect of middle leadership. However it is generally acknowledged that the skills required to teach and those required to lead are different and therefore, success as a classroom teacher does not guarantee success as a middle leader (Adey and Jones 1998; Adey 2000; Turner 2000; Brown et al. 2002). Exploring the views of school senior leaders, Adey and Jones (1998) found that middle leaders appointed solely on the basis of their success as a classroom teacher, floundered due to their limited comprehension of the complexities of the role. They argue for the provision of appropriate middle leadership preparation, which equips middle leaders with the skills required to lead departments or faculties and also contribute to whole-school planning and development.

Reviewing studies of middle leadership in Australia, Gurr and Drysdale (2013) found that the role of middle leaders and the extent to which they can contribute to whole-school matters is determined by senior school leaders. Consequently, the middle leadership role and associated support varies considerably across different establishments and the value of leadership preparation is not always fully appreciated by teachers. In research which explores the perceptions of senior and middle leaders in New Zealand, Cardno and Bassett (2015) found similar tensions. They recommend an urgent clarification of expectations and understandings of middle leadership, in order that development needs can be identified and addressed. Given the potential significance of middle leadership input for teachers, pupils and school improvement, it is argued that, without appropriate preparation for the role, the potential of middle leaders may not be fully realised (Cardno and Bassett 2015; Gurr and Drysdale, 2013). Further, appropriate preparation of teachers for leadership roles can be seen as a moral imperative for which a laissez-faire approach is irresponsible (Irvine and Brundrett 2019).

The body of literature regarding the leadership development of school leaders is large and varied, continues to grow and develop but focusses largely upon senior leaders. The leadership development of school middle leadership is a small but significant subset of this literature, capturing many of the same themes and recommending similar approaches to leadership development, with a focus upon the practice of middle leaders.

Adey (2000) argues that the development needs of middle leaders are diverse due to the growing number of expectations and the increasing complexities of the middle leadership role. Gunter and Rutherford (2000), and Harris *et al.* (2001), citing *The National Standard for Leadership* (Teacher Training Agency 1998) state that middle leaders require knowledge, understandings and skills that will equip them to lead the strategic direction of the subject, lead teaching and learning, lead and manage staff and efficiently and effectively, and deploy resources. Irvine and Brundrett (2019) conceptualise the knowledge, skills and abilities required for middle leadership as three over-arching capabilities: the character traits and dispositions that leaders bring to the role, including temperament and outlook; skills that can be acquired through training or mentoring; perspective, which is defined as the ability to draw from experience to foresee and predict future events, the quality of which is shaped by the quality and quantity of prior experience and the reflections and evaluations resulting from it.

Specific skills and abilities that middle leadership requires in order to fulfil the role effectively are explored by a number of authors:

- Adey and Jones (1998) highlight the need for middle leaders to exemplify excellence and model good practice in pedagogy. The pedagogical skills and abilities required include a thorough knowledge of the subject area and of subject-specific pedagogy (Adey 2000; Gurr and Drysdale 2013; Weller, 2001) and the ability to contribute to the strategic development of the subject (Gunter and Rutherford 2000).

- Training in management skills such as administration, budgeting, finance are identified by Adey and Jones (1998) who also allude to the need to be able to prioritise a workload that usually combines management responsibilities with a significant teaching commitment.

- Interpersonal and communication skills are identified as essential areas for development by a number of authors including the ability to motivate, inspire, challenge and support teams of staff (Cardno and Bassett 2015; Fluckiger *et al.* 2015; Glover *et al.* 1998), develop and nurture professional learning communities (Fluckiger *et al.* 2015) and fulfil a pastoral role for staff such as providing support, maintaining harmony and co-operation (Weller 2001). The management of people is the aspect that many middle leaders find most challenging (Irvine and Brundrett 2019).

- Strategic skills including the ability to take a whole-school view and contribute to whole school development planning and decision making (Adey and Jones 1998; Brown *et al.* 2002), to develop and agree a shared vision within the area of responsibility (Glover *et al.* 1998), facilitate a sense of common purpose and joint action to achieve shared goals (Brown *et al*. 2002).

- To inform and support these skills, Fluckiger *et al.* (2015) highlight the need for a comprehensive knowledge and understanding of system level information such as legislation, policy, procedures, curriculum and assessment.

## 6.3 Approaches to Middle Leadership Development

Harris *et al.* (2001), Gurr and Drysdale (2013) and Irvine and Brundrett (2019) all highlight the crucial role of middle leaders in delivering school improvement, arguing that their development requires an integrated approach, comprising opportunities for professional learning, experiential learning and reflection.

Some academic literature addresses the need to individualise leadership learning for specific purposes and career aspirations. Cardno and Basset (2015) then propose an individualised approach that is designed to develop skills in the management of people, systems and self. They highlight the importance of negotiating leadership development with each individual to ensure the full engagement of the individual and a tailored balance of knowledge, skills and dispositions that address the needs of the organisation and the middle leader.

Fluckiger *et al.* (2015) suggest two alternative pathways: development for those who intend to progress to headship should have a more strategic focus; development for those who plan to remain in middle leader roles should focus upon the acquisition of knowledge and skills that enable them to facilitate and nurture teacher leadership. There is a third aspect, addressing the needs of serving and experienced middle leaders. Exploring the notion of a leadership development continuum, Irvine and Brundrett (2019) highlight the significant value of experience to leadership development and the consequent need for different approaches to middle leadership development as experience increases.

## 6.4 Professional Learning

Credibility as a leader requires a high level of professional competence, knowledge and the demonstration of ongoing influence in the specific subject area (Gurr and Drysdale 2013). Irvine and Brundrett (2019) suggest that professional knowledge and skills can usually be developed through formal professional learning activities such as self-directed learning, training courses and job shadowing or mentoring.

Guskey (2002) asserts that, in order to achieve a change in practice, teacher professional learning must be viewed as a process, rather than a one-off event. A number of authors recognise the limited value of one-off courses or events, proposing an approach that embeds the learning event within a process which includes the application of new knowledge and professional reflection. Harris et al. (2001) argue for the need to apply new knowledge to the workplace and reflect upon the process of doing so, observing that a change in practice is more likely to occur when these actions are supported by a mentor or critical friend.  Gurr and Drysdale (2013) express a similar view, advocating that long and short-term professional learning be incorporated as one of several components in a package of activities which would also include induction, coaching, mentoring and a supportive performance management programme. Exploring the perspectives of middle leaders

regarding their professional development needs, Thorpe and Bennett-Powell (2014) found that middle leaders recognised the need for training programmes, but rated approaches such as coaching and mentoring more highly for effecting a change in practice, possibly due to their flexibility and capacity to accommodate a constantly changing work environment.

The content of professional learning courses and programmes is explored by some authors. Discussing a module designed to address the expectations of subject leaders articulated by the *National Standards for Subject Leaders* (Teacher Training Agency 1998), Gunter and Rutherford (2000) propose the need for conceptual underpinnings that explore and develop the links between pedagogy and leadership. In an approach that remains highly relevant today, they highlight the need to develop middle leaders as researchers able to support the systematic gathering and analysis of data about teaching and learning, and theorisers who are able to identify meaning in data and implement changes in practice.

Characteristics of effective professional learning in leadership are explored in aspects of the literature. Analysing professional learning and training opportunities for subject leaders in England and Wales, Harris *et al.* (2001) identify a number of features most likely to result in a change in leadership practice including: an action research component; encouraging the analysis and scrutiny of data and evidence; participating in areas of school development on returning to school; integrating development within school improvement programmes; stimulating debate about pedagogy and good practice; providing good advisory support throughout the course; establishing good rapport and trust between teacher participants; establishing support networks for teachers; providing support with follow-up work in schools. A common theme across all of the aspects identified is the element of active participation in learning. This aligns with the views of Brown *et al.* (2002) who call for a re-conceptualisation of leadership learning in which people assume responsibility for their own development rather than consider the process as something that is 'done to' them, an approach that chimes with inquiry approaches in curriculum leadership.

Reviewing a range of international research, Fluckiger *et al.* (2015) identify ten criteria for determining the quality of middle leadership preparation programmes including the extent to which they are: philosophically and theoretically attuned to system and individual needs; goal orientated; informed by research; have sufficient time for learning to be interspersed with collegiate support and reflection; practice-focused; purpose designed for the specific stage of the career; peer supported; context sensitive; enriched by partnership with relevant external agencies and provision evaluated regularly by providers.

Fluckiger *et al.* (2015) suggest that professional learning can provide middle leaders with a valuable opportunity to reflect upon the moral purpose of education and the importance of making a positive difference to the life opportunities of young people. This focus can be articulated and modelled in the teaching and leadership of middle leaders and could potentially be a source of motivation to leaders and others.

## 6.5 Experiential Learning

The highly influential work of Kolb (2014) underlines the powerful impact of experiential learning, based upon the assumption that people learn best through experience. Irvine and Brundrett (2019) propose that relevant leadership experience can be drawn from different roles within the school, taking on similar roles in the same or other schools, experience from outside school, from talking to peers or can be gained over time through their current leadership role. They argue that experience and subsequent reflection upon it, are key components of successful leadership learning, proposing that leadership experiences inform mental maps from which leaders draw to inform their decision making. Consequently, the greater the quantity and quality of experience, the greater the information from which to draw, resulting in the capacity for swift, intuitive decision-making.

It is, therefore, recommended that middle leaders actively seek new leadership experiences to develop their repertoire of capabilities. For established middle leaders this might be achieved by undertaking new leadership challenges or projects. For aspiring middle leaders this could include supported engagement in delegated leadership responsibilities (Adey and Jones 1998), working with experienced leaders, participating in decision making and implicit learning such as observing good and bad leadership practice (Turner 2000).

Leadership learning needs inevitably change and develop as experience is gained. Middle leader development therefore requires the negotiation of a flexible approach that is tailored to the needs of the individual (Bush 2009; Gurr and Drysdale 2013; Irvine and Brundrett 2019) and is relevant to current and future roles (Irvine and Brundrett 2019). In a demanding and busy working schedule, consideration must be given as to how time might be created to plan an individualised approach to development. Both Gurr and Drysdale (2013) and Cardno and Bassett (2015) suggest that this process could be embedded in a supportive programme, which begins with personal reflection and identifies areas for development and support. In this middle leaders take responsibility for their leadership development through training and gaining relevant experience (Gurr and Drysdale 2013).

## 6.6 Professional Reflection

Many of the approaches already discussed demonstrate the capacity of professional reflection to provide an individualised opportunity for leaders to take control of and develop their leadership practice within their unique context. Glover *et al.* (1998) argue that the need for people to have structured opportunities to reflect upon their role, their competencies and areas for development. Harris *et al.* (2001) similarly assert that the value of reflection to professional learning is well established in academic literature, offering an opportunity to internalise new knowledge and consider implications for practice. Professional reflection is regarded as essential to the processes of transferring new knowledge to the workplace, in other words learning from experience and developing leadership practice. A change in practice is thought to be more likely when reflection is supported by an external agent such as a mentor, coach or critical friend using an approach that encourages creative problem-solving and ownership of problems and preferred solutions (Harris *et al.* 2001).

Thorpe and Bennet-Powell (2014) explore coaching and mentoring in more detail, highlighting the esteem in which these approaches are held by teachers and leaders for their capacity to promote meaningful reflection and provide an individualised approach to building skills. They also identify blurred understandings across the profession of the terms *coaching* and *mentoring* and highlight resource implications such as training and time for meaningful reflective conversations to take place. Consideration of how these issues could be addressed could help realise the full benefits of these approaches.

Brown *et al.* (2002) identify the significance to leadership learning of *Reflective Action Research,* which they argue has the potential to facilitate departmental collaboration and collegiate reflective practice and further develop skills in research methodologies. Citing Glover (1998) who reports that middle leaders found reflective active research significantly more beneficial than other approaches to leadership development, Brown *et al.* (2002) argue that a reflective, enquiry-focussed approach could support the revitalisation of aspects of leadership practice and thus help redefine the profession from within.

## 6.7 School Culture: Supporting Middle Leadership Development

Underpinning many of these approaches is the presumption of a school environment that is conducive to leadership learning. Gurr and Drysdale (2013) assert that the success of middle leaders is predicated on contextual factors such as the role and expectations of senior leaders and the organisational structure and culture of the school, which are shaped by senior leaders. Seashore Louis and Lee (2016) argue that organisational learning and change is more likely to occur in a collaborative culture in which collaboration, reflection and willingness to try new approaches or take collective risks is a cultural norm. Features of a collaborative culture might include professional dialogue with colleagues, observations by peers and leaders, feedback from students and professional reading and coaching.

Thus, the crucial contribution that middle leaders can make to whole school policy, decision-making and improvement (Adey and Jones 1998, Brown *et al.* 2002) is more likely to be realised in a school culture that is collaborative, rather than hierarchical. Collaboration between senior and middle leaders has the potential to facilitate developmental opportunities for middle leaders to contribute to whole school decision-making and development planning (Adey and Jones 1998; Brown *et al.* 2002). This requires a shared understanding of the potentially critical contribution that middle leaders can make to teaching and learning (Cardno and Bassett 2015), a willingness for senior and middle leaders to work together to achieve common goals (Brown *et al.* 2002; Gurr and Drysdale 2013) and a pro-active approach by senior leaders to the development of middle leaders (Gurr and Drysdale 2013).

Middle leaders will also require to develop the capacities required to help build and sustain a collaborative culture within their school and specific area of responsibility such as coaching, active listening (Gurr and Drysdale 2013) and collaborative working. They also need to assume the important responsibility of nurturing, supporting and developing teacher leadership (Fluckiger *et al.* 2015) and collective working to support school improvement.

## 6.8 Middle Leadership Professional Learning

The short review of the literature on middle leadership professional learning points to some critical issues about:

- knowledge, skills, capacities that need to be developed in both aspiring and serving middle leaders
- while partly focused on the development of the individual aspirant/serving middle leader, middle leadership development should also be seen as a means to contribute to firstly, the development of others, particularly the teaching and leadership of teachers and secondly, the improvement of the organisation and education system.
- flexibility and access are important with consideration given to a different professional learning opportunities such as course-based programmes; experiential learning through mentoring and coaching; enquiry methodologies; participation in school development and practice-based learning combining cycles of action and reflection.

One aspect not covered in this literature is the development of the role of middle leadership in curriculum leadership. There was only incidental mention of this area found in the policy analysis. While subject leadership is used as a synonym for middle leadership (and has a suggestion of curriculum leadership), the characteristic approach in policy is to highlight generic leadership processes such as purpose, vision, collaboration, self-evaluation and improvement. However, given the current reform programme, *Curriculum for Wales* (WG 2020), it is important to consider the issue of curriculum leadership and middle leadership.

# 7. Detailed Analysis of Policy

## 7.1 Defining Middle Leadership in Welsh Schools: A Historical Perspective

Determining what posts and/or activities could be construed as middle leadership is an issue for various systems including for the Welsh education system. Three documents provide some insight into the constructions of middle leadership historically. Each of these descriptions includes practice beyond the classroom which, Muijs *et al.* (2013) argue, is an essential dimension of leadership exercised by teachers. These documents are (1) *The Standards for Subject Leaders* (Teacher Training Agency 1998), (2) *Consultation on Professional Milestones & Standards* (GTCW 2005) and (3) *Revised Professional Standards for Education Practitioners in Wales* (WG 2011).

An early anchor for middle leadership is the concept of 'subject leadership' set out in the *Standards for Subject Leaders* (TTA, 1998). Middle leadership is conceived of as a role in 'the middle' with the assumption that subject leaders work closely with the headteacher (HT) and the senior leadership team (SL). This is a broad based standard specifying knowledge, understanding, skills and attributes of subject leadership and four key areas of practice:

- *Strategic direction and development of the subject*

- *Teaching and learning*

- *Leading and managing staff*

- *Efficient and effective deployment of staff and resources* (TTA 1998: 9).

Working within the context of the school aims and priorities, subject leadership is focused on enhancing teaching and learning by building the practice and development of the teachers as well as working with parents. Subject leaders also have clear management responsibilities for staff and resources. There is considerable variation in the exercise of subject leadership across the sectors. In the secondary sector this is leadership primarily of subject departments while in the primary and special sectors, the role of subject coordinator appears to be looser and depends on the size of the school and the functions the HT retains.

In the GTWC's (2005) consultation document on a framework for professional development teachers, a wide range of roles and positions are conceived of as working at a "*middle leadership level*" (GTCW 2005: 25) including: Heads of Year, Subject leaders, Key Stage leaders and Special Education Needs Co-ordinators (SENCOs) (WG 2017c) . Across these posts are varied responsibilities including possibly, management and leadership, school improvement, pastoral and academic guidance, leadership of professional learning and line management responsibilities. In later guidance related to the Chartered Teacher (CT) Programme (GTCW 2006), the distinction between middle leaders and exemplary teachers is blurred. Egan (2009) records that the CT Programme in Wales was intended to provide professional learning opportunities for middle leaders as well as teachers. Thus, the *Standards for Chartered Teacher* (GTCW 2007) cover "*those teachers who effectively fulfil formal or informal middle leadership roles within their workplace* (GTCW 2007: 1).

The *Revised Professional Standards for Education Practitioners in Wales* (WG 2011) contain practising teacher standards and leadership standards. The distinction between teaching and leadership in the 'middle levels' continues to be blurred. In the teaching standards, for example, there are broad themes related to engaging in leadership practices beyond the classroom: "*Be actively involved in professional networks and learning communities*" (WG 2011: 9), working cooperatively as a team member with colleagues and external agencies. The leadership standards appear to be largely concerned with the role of the HT. However, ideas around 'leadership across the school' surface. HTs are expected to develop the leadership of others, create opportunities for distributed leadership and build collaboration.

In these early policy expectations, there is considerable overlap between teaching, particularly accomplished teaching, and leadership in the middle. The overlap does reinforce the notion that the primary focus on leadership is teaching and learning and that leadership is an area of practice exercised by different teachers in different ways and locations across the school (Forde and Dickson 2017). If a wide definition of middle leadership is used, this conceivably could include currently teachers who have a teaching and learning responsibility (TLR) Teachers receiving TLR payments 1 and 2 are required to either "*lead, manage and develop a subject or curriculum area; or to lead and manage pupil development across the curriculum*" and further, this role "*involves leading, developing and enhancing the teaching practice of other staff*" (WG 2019a: 25-6). This overlap between teaching and leadership continues in more recent policy documents.

## 7.2 Detailed Policy Analysis

This section presents the detailed analysis of the range of policy documents identified for this review, the purpose of which is to look more specifically are the construction of middle leadership in Welsh education policy. Within each of the four themes there is a cluster of codes set out in Table 2. Each of these codes is discussed highlighting aspects relevant to the practice and development of middle leadership.

## Table 3: Themes and Codes

| Themes | Codes |
|---|---|
| Leadership at all levels | • building leadership capacity<br>• roles and responsibilities of middle leadership<br>• subject leadership and policy priorities<br>• learning leadership |
| Professional learning | • leadership of professional learning<br>• professional development of aspiring and serving middle leaders<br>• succession planning |
| Teaching and Learning Quality & Outcomes | • leadership and the quality of teaching and learning<br>• self-evaluation, data analysis and accountability<br>• holding middle leadership to account |
| Leadership teams, structures and processes | • collaborative practice in school<br>• school-to-school working |

## Theme 1 Leadership at all levels

*(1) Building leadership capacity*

Across the sample of policy documents there are limited references to specifically senior and/or middle leadership. However, the notion of 'leaders at all levels' is a central idea, notably distributed leadership and learning leadership, and reflects the building of leadership capacity as a system-wide improvement strategy. The OECD's review of schools in Wales identifies the building of "*leadership capacity at all levels of the system*" (OECD 2014: 67) as one of the system's challenges. This report asserts the importance of 'leading in the middle' but this term is concerned with the building of connections and collaboration across the system particularly through school-to-school collaboration where headteachers and others work collaboratively as a form of system leadership.

Increasing leadership capacity in school, nevertheless, was a significant area of development for the Lead and Emerging Practitioner School Pathfinder Project. The evaluation report highlighted the way in which "*...schools investigated how to develop leadership capacity with a specific focus in some on the role of middle leaders that included establishing clearer definitions of the role and expectations of post-holders* (NFER & WG 2014: 16). This finding is echoed in the evaluation of *Schools Challenge Cymru* (WG 2017d) *"... enhancing those of middle leaders and the extended leadership team"* (WG 2017d: 26). Distributed leadership builds leadership capacity in the school as an improvement strategy: *"Responsibilities are distributed to make sure that there is a relentless and consistent focus on the school's priorities, and on outcomes for learners"* (Estyn 2014: 31). However, there is no real discussion of middle leadership as a form of distributed leadership nor their role in building the culture and capacity for distributing leadership across the staff they lead.

*(2) Clarity about the role and responsibilities of middle leaders/leadership*

With limited policy guidance on the role of middle leadership, determining their responsibilities with regard to improvement is judged to be problematic. "*Delegation and empowerment*" (WG 2017a: n.p.) are expected of all formal leaders. However, a recurring theme in Estyn's annual reports is clarity around the role and responsibilities of leadership. Where leadership is excellent/good "*...leaders at all levels understand their own roles and responsibilities and work together to create an ethos and culture where improving standards for all learners is the main priority*" (Estyn 2017a: 87). In less successful schools the converse is evident: "*In around half of schools judged to be no better than adequate, senior and middle leaders do not manage their responsibilities well enough*" (Estyn 2013: 72) and so middle leadership has an important role to play in facilitating this.

*(3) Subject and department leadership*

Variations in outcomes across different subjects is characterised as an issue of the leadership of the subject/department and the skill and preparedness of the leader to focus on the quality of teaching; *"Where pupils' achievement is variable within subjects and across subjects, it is because not all with a leadership responsibility focus consistently on the core business of improving the quality of teaching"* (Estyn 2017a: 87). However, there is little explicit discussion of the place and practice of subject leadership and subject departments in taking forward coherent strategies to achieve school improvement in teaching and learning.  The other issue for subject leadership concerns the national priorities in Welsh, English and mathematics. *"Within any school it is good and excellent teaching from leaders of language subjects and mathematics that provides the basis on which to build opportunities to apply literacy and numeracy across the curriculum."* (Estyn 2013: 6). Addressing these priorities requires collaborative practice across subject areas: *"all teachers need to be involved in cross-curriculum and cross-stage planning."* (Estyn 2013: 6).

## Theme 2: Professional Learning

*(1) Leadership of professional learning*

The leadership of professional learning in a school is one of the range of strategies designed to build school improvement and is central to the current curriculum reform programme. Bringing forward the new curriculum programme requires *"all practitioners [...] to collaborate with others to lead their own professional learning"* (WG 2017b: n.p.). Part of the task of school leaders is to *"develop the culture, structures & conditions to facilitate professional dialogue, collaboration & knowledge exchange"* (WG 2017b: n.p.). Departmental leadership contributes to effective whole-school development: *"leaders [...] ensure that any training aligns closely with individual, departmental, school and national priorities. They give time for individual departments to reflect on any training given and modify their practice in a way that best suits their subject"* (Estyn 2019a: 96).

This policy emphasis on professional learning to build capability through collaborative professional development has implications for the role of middle leadership. These developmental strategies are designed to take forward improvement in quality of teaching and learning: *"Leaders at all levels provide strong support to help staff to do things in new and better ways"* and *"a  strong and collaborative culture of professional learning"* (Estyn 2016:16). In this, middle leaders have a role in facilitating collaborative professional learning. in order that *"staff feel comfortable seeking advice from each other"* (WG 2017b: n.p.).  Rather than top down management, *"senior and middle leaders may facilitate professional learning, the contribution of all staff is valued and seen as central to success. There is recognition of the collective responsibility for improvement and a sense that 'together we can'"* (Estyn 2016: 17). In schools where there is a strong culture of professional learning and collaboration, practitioners work as a team to build achievement for all pupils.

*(2) The professional development of aspiring and serving middle leaders*

A recurring issue is the *"limited number of well-tailored professional development opportunities for senior and middle leaders, and teachers"* (Estyn 2015b: 4). There is reference to in-school strategies to develop middle leadership predominantly in secondaries. Building leadership capacity of senior and then increasingly of middle leadership was a key strategy adopted by schools in *Schools Challenge Cymru* (WG 2017d): *"leaders establish a learning culture and the professional development of staff at all levels is a high priority, including the development of leaders, often from early stages in their careers"* (Estyn 2016: 11). Middle leadership development is about helping to build greater collaborative practice and increase leadership capacity through opportunities for distributed leadership: *"This enables schools to accelerate progress in more areas of their work and to nurture the leadership skills of a wider group of staff"* (Estyn 2019: 84).  A range of development opportunities are provided *"...middle leader development and fixed-term secondments to senior leadership..."* (Estyn 2015b: 55) and other experiential learning experiences: *"encouraging their staff to take part in mentoring and coaching activities [...] They share effective practice, coach and mentor less experienced leaders..."* (Estyn 2016: 46).

*(3) Succession planning and middle leadership in headteacher pipelines.*

Succession planning and headteacher pipelines are crucial for strengthening leadership. The OECD's (2014) review noted a lack of succession planning and the need to build a more coherent strategy around career-long leadership development:

> **membership of the pool of leaders at top levels is still determined too much by individual and personal ambition and too little, at present, by any national system for ensuring that the aspiring and potential leaders and managers of the future develop the skills that the system requires (Estyn 2014: 15).**

Middle leadership is an important component in headteacher pipelines: "*the teachers' pay structure must also provide the right incentives for suitable teachers to progress to middle and senior leadership roles*" (PR 2018: 4.13) and so the question is how to "*motivate and reward fairly those who take on additional responsibilities and leadership positions*" (PR 2018: 1.7). The curriculum reform programme points to the need to enhance leadership capacity further (IWPRB 2019: 1.28). Opportunities should be created to enable teachers to take on activities such as those evident in effective schools: "*activities such as leading a whole-school task-and-finish working group, shadowing roles to learn from more experienced colleagues, and creating fixed- term leadership opportunities within and beyond the school*" (Estyn 2016: 24). This contrasts with practice in less effective contexts: "*In weaker secondary schools, the role of middle leaders is often underdeveloped. Middle leaders do not have enough opportunities to lead initiatives, to evaluate outcomes or to identify areas for development and plan for improvement*" (Estyn 2019a: 32).

## Theme 3: Leadership teams, structures and processes

*(1) Collaborative practice in school*

Collaboration is one of the keynotes of current education policy in Wales (WG 2015b, Estyn 2017b) and is threaded through various policy documents concerning improvement. System-wide improvement is founded on the school as a learning organisation where one of the seven principles relates to a collaborative/participative form of leadership: "*Promoting team learning and collaboration among all staff*" (WG 2017b: 10). This is purposeful collaboration set in a wider distributed leadership culture: "*these schools develop a team ethos and ensure that staff share powerful core values to achieve the best possible outcomes for all pupils. There are strong arrangements to distribute leadership responsibilities*" (Estyn 2017a: 71). Thus the focus of collaboration is developmental, building effective practice and improving pupil outcomes. Thus, "*collaborative working and collective learning*" is to enhance "*learning experiences, learner outcomes and/or staff practice*" (WG 2017b).  Leaders have a primary role in fostering collaboration across the school: "*leaders work well with all staff to create learning communities built around a culture of collaborative working*" (Estyn 2018: 33).

One of the key differences between teachers exercising leadership and those in formal leadership roles is the sense of clear responsibilities for the work of others by exercising accountability, balancing delegation and support, building motivation and promoting professional learning. Part of the task of leaders is "*Sustaining a collaborative culture*" (WG 2017a: n.p.). This distinction helps to point up the potential of middle leadership as central to building and sustaining collaborative practice across their area of responsibility. The  role of leaders is to secure sufficient time and opportunity to collaborate: "*In the most effective practice [...] leaders make sure that the allocation of time for these developments is 'protected' and enable improvements to be sustained*" (Estyn 2017a:18).

*School-to-school collaboration*

The focus on collaborative practice includes school-to-school collaboration and the work of the regional consortia (Estyn 2017b). The OECD Report (2014) recommends that Welsh education should  "*Invest in developing leadership capital across the education system, so that school improvement can be led from within Wales by schools, local authorities and regional consortia*" (OECD 2014: 8). Collaboration in these wider contexts, has implications for middle leadership in school. "*School-to-school collaboration may entail opportunities to share subject expertise which is associated with subject leadership roles and collaborative practice across different schools would be an area of development*" (WG 2017b: 35). Further, "*school leaders ..promote and participate in strong collaboration with other schools, parents/carers, the community, higher education institutions and other partners*"  (WG 2019b: n.p.). A cornerstone of this collaborative practice is sharing expertise and practice to enhance teaching and learning.

## Theme 4: Teaching and Learning: Quality and Outcomes

*(1) Leadership and the quality of teaching and learning*

Leadership is central to the national mission for system-wide improvement of education in Wales: "*Our teaching profession, with an emphasis on strong leadership and professional learning, will help deliver on the high expectations we all share for our learners, schools and education system*" (WG 2017e: 2). Further, where weaknesses in schools have been noted, these have been "*traced back to failures of leadership. There is a strong link between outcomes, provision, and leadership and management*" (Estyn 2011: 7).

Descriptions of both excellent practice and of adequate practice are instructive in teasing out different dimensions of middle leadership. Effective practice in monitoring and evaluation has led to "*significant improvements in standards and provision*" (Estyn 2011:15). In contrast, where there is only adequate departmental management:

- "*managers do not observe lessons enough;*
- *a minority of departments do not analyse data rigorously;*
- *self-evaluation does not identify areas for development clearly;* and
- *plans to improve do not address shortcomings or have challenging targets*" (Estyn 2011:15).

The emphasis, therefore, is on building leadership through strengthening accountability, examining standards and practice: "*Those in formal leadership roles will need the commitment, understanding and skills to enable our reforms* [in the curriculum] *to succeed*" (WG 2015a: 26).

*(2) Self-evaluation and data analysis*

Central to leadership is the need to address the learning needs of all learners by ensuring "*...an integrated approach to responding to learners' learning and other needs*" (WG 2017b: n.p.). The place of middle leadership connecting whole school improvement approaches and classroom practice is underlined as fundamental to school improvement in the evaluation report of *Schools Challenge Cymru and Pathways to Success Schools*, *(PtS)* (WG 2017d):

> **"Involving middle leaders, as well as senior leaders, in school development is essential to develop ownership of the approach and to support succession planning: [...]**
>
> **School improvement needs to be seen as a collaborative journey, involving not just the SLT, but also middle leaders and other staff, in order to develop a shared sense of ownership and agreed activity (WG 2017d: 93).**

Accordingly, this report notes "*a growing emphasis on improving leadership and management quality, with many schools investing more in the development of middle leaders to ensure that effective practices were cascaded down the school*" (WG 2017d: 23).

One of the issues highlighted in several documents, is the lack of skill on the part of some leaders. The contrast between effective and adequate leadership practice relates to skilful use of data to make judgements and to ensure teacher accountability. Thus, where practice is deemed adequate there is a lack of rigour in leading improvement efforts: "*... often senior and middle leaders' evaluations of the quality of teaching are too generous...* " (Estyn 2014: 76). In a minority of schools:

> **whole-school and departmental evaluation reports are too long, descriptive, and overly generous [...] not evaluate the impact of teaching, marking and provision on standards. [...] In a few cases, planned actions are vague or leaders do not use evidence from lesson observations to make commonly identified shortcomings a focus for improvement (Estyn 2015: 54).**

Part of the issue is a "*...lack leadership and engaging/holding to account all teachers*" (Estyn 2015a: 44) by middle leadership.

*(3) Holding to account of middle leadership*

Teachers as leaders are expected to be "*Taking responsibility for self*" as well as *"exercising corporate responsibility"* (WG 2017a: n.p.). Further, the curriculum reform programme brings *". ... a new responsibility and accountability – on practitioners and critically on school leaders"* (WG 2015a: 26). One aspect where we see repeated references to middle leadership is in their being held to account by senior leadership. Where there are concerns about the quality of leadership, middle leadership is perceived as part of the problem: " *[...] In a minority of schools where leadership is only adequate, there is inconsistency in middle leadership. In these schools, line-management arrangements are not robust and performance management targets lack focus and challenge*" (Estyn 2012a: 8). Middle leadership here largely focuses on administration "... *a minority do not use data and information well enough to evaluate performance and do not focus enough on how to improve the quality of teaching and learning*" (Estyn 2016: 58). Further, "*leaders' monitoring does not always evaluate sharply enough where pupils make the best progress and why*" (Estyn 2019a: 84-85). These findings suggest that there is recognition of the role of middle leadership in school improvement alongside limited opportunity to develop the skills for this area of responsibility.

## 7.3 Summary

From this analysis middle leadership can be characterised as a 'formal leadership role' and so is distinctive from the leadership roles undertaken by teachers. However, middle leadership is a broad term covering a range of roles and responsibilities. From the analysis it is possible to surface of the key issues in relation to effective practice in middle leadership. Middle leaders have an identified area of responsibility whether this be a department, subject, stage, year, function, each of these carrying expectations around:

- leading school/departmental improvement and ensuring the quality of teaching and learning and of support and care

- building collaborative developmental cultures and practices to work towards improvement

- create and sustain opportunities for distributed and teacher leadership across their area of responsibility.

- In addition, the *Curriculum for Wales* (WG 2015a) brings with it a significant change programme where potentially middle leadership plays a pivotal role.

# Appendix:
# The Desktop Study: Research Methods and Analysis

## A.1 Research Aims

- To analyse policy to map out the way in which 'middle leadership' has developed in schools in Wales.

- To examine the implications of the evolution of 'middle leadership' for the future development of this level of leadership.

- To identify areas for the professional learning to support the role of middle leaders in school in Wales.

## A.2 Literature Search

- Literature search of academic literature for studies of middle leadership in Wales using various databases including ProQuest, DERA, ERIC, Scopus and Google Scholar

- Search terms adapted from Bennet *et al.* (2003a, b) and updated - table of terms used

## A.3 The Study of Middle Leadership

The body of work on middle leadership and the range of variants can be divided broadly into the following themes:

- *Challenges in the role of middle leadership*

- *Curriculum leadership*:

- *Practice and improvement*.

- *Professional development*

## A.4 Policy Analysis: Selection, Sampling  and Analysis

The survey of policy documents adopted a critical policy analysis approach (Diem *et al.* 2014; Young and Diem 2017). The purposes of this policy analysis was to identify the changing constructions of middle leadership in schools in Wales. From this analysis key issues related to firstly, the ongoing evolution of middle leadership and secondly, the implications for professional learning opportunities for aspirant and serving middle leaders in schools in Wales were considered.

The first scoping of policy documents indicated that while leadership is a key concept, the term tends to be used in a generic sense and where defined largely in relation to the role of headteachers. There is a limited discussion and policy guidance on the role and responsibilities of middle leaders in schools in Wales. Therefore, the analysis was divided into two parts. The first part consisted of reviewing three current policy frameworks to map out the construction of leadership. These policies are

- *The Professional Standards for Teaching and Leadership*

- *Schools in Wales as Learning Organisations*

- *A Curriculum for Wales*

The second part looked in more detail at issues related to leadership and, where mentioned, middle leadership in a wider range of policy documents produced by the Welsh Government (WG) and other national organisations and also included reviews by the OECD. In addition, evaluation reports for various WG initiatives were analysed. The list of documents is in the appendix. Table 1 below provides an overview of the types of documents and organisations.

**Table 3: Types of Policy Documents**

| Type of document | Organisation |
|---|---|
| Professional standards & professional learning frameworks | GTCW/EWC |
| Annual reports | Estyn |
| Reviews of Welsh schools | OECD |
| Consultation and policy documents on professional standards, curriculum reform and school improvement | Welsh Government |
| Evaluations | Commissioned by Welsh Government |
| Pay reviews | Welsh Pay Review Body |

## A.5 Themes and Codes

The analysis of documents was through a critical reading process (Diem *et al.* 2014). The first step was to identify and collect mentions of middle leaders/middle leadership and other mentions of associated roles from a range of policy documents. As these were limited, extracts containing references to leadership and management were also noted. The data from these selected extracts were then reviewed using a discourse analysis approach to identify codes (Perryman 2012). Through re-reading, connections were then made between clusters of codes which were then gathered into four broad themes. These themes are:

- Leadership: An evolving concept
- Teaching and Learning Quality & Outcomes
- Leadership teams, structures and processes

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