

Literature review and comparative analysis on subject-specific development needs of middle leaders

Final report to Ambition School Leadership and Institute for Teaching

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i) Executive summary

This report addresses questions around what those middle leaders with a subject responsibility need in terms of skills, knowledge and competencies. While middle leadership incorporates a broad range of roles (e.g. key stage leaders, pastoral leaders), we characterise subject leadership as a subset of middle leadership, having a focus on the specifics of subject demands and accountability. The report draws upon the literature to elicit the skills and expertise required to fulfil this role successfully. The findings of the literature review highlight the multi-faceted nature of subject leadership, which requires a diverse set of competencies including strong subject expertise, curriculum design and the ability to drive a subject/department forward. We also consider the generic competencies required by all middle leaders (including subject leaders), involving the management of people and the ability to create and implement a strategic vision. Whilst highlighting the lack of recent research in this area, the report explores the range of roles and responsibilities undertaken and, where possible, explores variations across subjects, phases and school locations. This has, however, not been an easy element of the study as much of the work conducted has merged findings across varied settings and contexts. Moreover, dividing roles by subject is difficult, as again, much of the work undertaken focusses on the generic aspects of the middle leader role rather than specific subject responsibilities.

Following an introduction exploring the background to this topic we discuss subject leadership, firstly in primary schools and then in secondary education. We argue that subject leadership has been focussed upon as a means to facilitate school improvement. This follows the rationale that by distributing leadership responsibility across the school we can raise the profile of teaching and learning, allocating responsibility to subject leaders for raising standards within their curriculum area. It is further argued that teachers like the sense of working collaboratively, especially within primary school settings. The literature highlights the importance of subject leaders developing practice within their subjects to support wider school improvement initiatives. It is noted, however, that there is often a tension between developing innovative practice and working in line with external policies and agendas. Subject leadership is most effective when subject leaders have a good sense of the complexity and multi-level nature of school activity and can adapt and flex their practices to meet these wider needs. One particular area of challenge identified for primary subject leaders was that of subject knowledge. In primary schools, teachers may find themselves responsible for a subject area in which they have no expertise. In small schools they may also hold several responsibilities at the same time. This problem may be complicated further in rural schools, where subject leaders may have little contact with neighbouring schools with whom they could share expertise.

In contrast, secondary school subject leaders were likely to be subject specialists working within a departmental team of other specialists. Here it is argued that departments need spaces where subject staff can meet, discuss, challenge, share and ask for help. Such collaborative activity was valued by teachers and facilitated the development of practice. Subject leaders were seen both as a lead within the department but also as an advocate in wider school activity and negotiations. The effective qualities that subject leaders brought to the role were characterised in terms of them holding subject expertise and a clearly articulated philosophy or vision for the subject, alongside high levels of professionalism. In this way, they could also influence others through modelling good practice. In both primary and secondary settings, clarity around the subject leader role was not always present, and different subject areas were typically awarded different levels of status within school, with 'core' subjects receiving higher levels of attention and resources.

The literature around middle leadership emphasises the crucial role that middle leaders play in developing teaching and learning through staff development. Again, the sense of collaboration and establishing shared beliefs around learning appear to be especially important. The literature suggests that mentoring, coaching and building communities of practice are the most commonly used methods for achieving this. Middle leaders could also be seen as being caught up in a number of tensions: for example, those between external imperatives and the school focus for improvement; or in mediating issues between teaching staff and senior managers.

A recurrent theme throughout the literature is the need for middle leaders to keep firmly focused on classroom practice and student learning. It was also noted that middle leaders should provide early opportunities for other teachers to develop their leadership skills in order for them to progress through the hierarchy and eventually take up headship. This was found to add to the levels of job satisfaction experienced within their roles.

Moreover, the importance of engaging in reading and research was found to be an important aspect of middle leadership in order to drive innovative evidence-based practice.

Finally, it was noted frequently within the literature that middle leaders require strong time management skills so that they can juggle the many demands of their role and set achievable developmental goals.

The report then offers comments related to the developmental needs of middle leaders, whilst highlighting areas where not enough is known. Firstly, the literature indicated that staff, in particular primary teaching middle leaders, were reluctant to critically appraise colleagues' work. Anecdotal evidence would suggest that this has shifted, but it is clear that any development programme for middle leaders needs to consider carefully how this might be achieved constructively. Further work is therefore required to gather evidence of what is happening in schools to meet this need.

Secondly, the unevenness and blurred nature of middle/subject leader roles may have become clearer since the early studies reported here, but is likely to become increasingly mixed as schools become more diverse (i.e. MATs, TSAs and free schools etc.). Thus, the role needs some thought to establish whether core principles of middle leadership exist or whether there is a need for complete flexibility amongst staff to enable them to adapt to new settings as they move jobs. Thirdly, middle and subject leaders must be fully aware of wider school initiatives and directions in order to complement, enhance and indeed inform this activity. Subject expertise needs support, particularly for those in primary school settings and the value of subject networking in relation to this is clear. The literature suggests that as subject knowledge improves, so too does teaching and learning.

Finally, there is a responsibility on the head and senior leadership team to ensure that they support, facilitate and encourage middle/subject leaders in professional development; with time to disseminate, develop and support, through offering an appropriate emphasis on each subject to ensure that all areas gain opportunities to improve.

Introduction, outline and background for the work

Leadership in schools has been of increasing interest and the focus of much research over the last two decades. In particular, school improvement has been linked to the activities of leadership at a variety of levels and of particular interest to this literature review is the notion of 'middle' and 'subject leaders' in both primary and secondary phases of education.

The development of subject leadership was a way of enabling teaching staff with curriculum responsibility to recognise their role in leading their subject: taking responsibility for the teaching and learning that is taking place, whilst at the same time enhancing the performance and success of their schools. Thus, 'middle leaders' were also in most cases 'subject leaders' with the exception of roles such as special educational needs leader and pastoral leaders which have a cross-curricular/school remit. While in the secondary sector the role of 'head of department' as the teacher who held a subject responsibility had been established practice, the role of subject leader in a primary school, introduced by the then Teacher Training Agency in 1998, was a new concept which led to a whole re-thinking of the ways in which leadership was conceived and understood. Thus, conceptions of layers of leadership were made explicit and those allocated subject leadership roles were also deemed to be middle leaders with responsibility for upholding, contributing to and executing an agreed school strategic direction in relation to their area of responsibility.

As Bennett et al. (2003) and Wong et al. (2010) have highlighted, it is important to understand the relationship between middle leadership and subject leadership. Subject leadership is an important subset of middle leadership. Therefore, to understand the needs of subject leadership, it is also important to recognise the body of literature around middle leadership. The middle leadership literature tends to focus on leadership skills, knowledges and competencies required by all middle leaders, including subject leaders. The subject leadership literature is more focussed on the particulars of subject. Thus, for this literature review, it is assumed that the discussions about middle leadership are relevant to subject leaders and the terms used are based on the references.

The introduction of the notion of leadership at multiple levels led to a flurry of research that looked at middle leadership and, whilst initially there was a focus on subject knowledge for the subject leadership aspect of this role, it quickly became apparent that the development of leadership skills was important in order to act effectively and strategically as a subject leader. Many studies began to indicate that middle leader roles were lacking in strategic impact and, as a result, a number of training programmes (accredited and non-accredited) built up around the area of leadership development.

Further, anecdotal feedback from teachers indicates that leadership development has enhanced the career prospects for teachers with ambitions to gain senior leadership positions. As a consequence, the middle leadership role has become a 'taken for granted' aspect of school life, necessitating training programmes that are geared towards leadership. What is becoming more apparent, however, is that the focus on subject and context has perhaps become somewhat lost under leadership development programmes that focus on generic leadership skills. Whilst these are still undoubtedly useful to teachers, anecdotally they are voicing a growing sense that such programmes do not address more specific needs around subject knowledge development, or strategies designed to meet the needs of different contexts and phases of education.

As a consequence of these shifts, we have been commissioned to look at the literature development in the area of subject and middle leadership in primary and secondary school settings in the UK in order to identify trends, comparisons, contrasts and gaps that can inform middle and subject leader

development programmes. To that end, what follows is an exploration of both subject and middle leadership through examining the academic literature; and, where possible, teacher voice is expressed through article development and contributions to newspapers such as the Times Education Supplement.

Method

This literature review draws mainly upon peer-reviewed journal articles and books focussing on commentary related to settings in England (unless otherwise stated). In addition, it makes reference to a number of reports from funded research projects as well as policy documents and professional journals. These 'grey' sources were selected for inclusion where they were cited within academic sources and were found to be relevant to the questions explored within the report.

The initial review was conducted by entering the following search terms into the university's library database, which itself draws upon a wide range of databases:

subject leader, subject leadership, subject leadership primary, subject leadership secondary, subject leadership xxxx (with xxxx replaced by each of the individual subjects within the National Curriculum for primary and secondary schools in England (DfE, 2013; DfE, 2014)), subject leader xxxx, leading subjects, leading xxxx, subject responsibility, department leadership, department leader, curriculum leadership, middle leader, middle leadership, middle leadership scale, middle leadership context, middle leadership small school, middle leadership large school, middle leadership rural school.

Subsequent sources cited within the sources emerging from the initial search were then followed up whenever they appeared relevant to the brief. The search focussed mainly on work completed from 2003 onwards in an attempt to capture research conducted after the last major review of middle leadership took place (Bennett et al., 2003). To keep the review manageable within the time available and to capture the work likely to be most relevant to Ambition School Leadership and the Institute for Teaching, we focussed predominantly on UK studies. However, some international and/or older work was included where it was central to the area being discussed or where there was a dearth of recent UK sources.

When searching for work relating to subject-specific aspects of leadership, only a small number of relevant studies were found. Although the search terms listed above returned many articles, when filtered for relevance it was found that very few of them related specifically to the impact of subject leadership.

Once the review was completed we then divided the findings into themes related to the search terms and compared and contrasted the arguments. This process of collating and comparing the findings allowed us to identify areas which seemed to be particularly important to the role of subject (and more broadly) middle leaders. Each researcher took a focus for our writing and then worked across all sections to allow cross-referencing of our understandings and to avoid repetition of themes. The greatest challenge was in the area of subject leadership where there was a lack of recent information related to this role. Moreover, much of the literature conflated school settings in relation to phase and geography. We have, however, identified literature where specific information is given, albeit limited in number and scope.

Taking a lead

The last twenty years has seen a growing emphasis on leadership, rather than management, to bring about educational reform. This has led to what O'Reilly & Reed (2010) termed 'Leaderism', and represents a shift in emphasis from management to leadership, recognising the crucial role that leadership plays in bringing about school improvement. Thus, we now have senior *leadership* rather than management teams and the growth of middle leadership in schools. Middle leadership has emerged through the recognition that distributing leadership and building leadership skills early creates more effective schools.

The relationship between effective school leadership and school success had been explored in the literature, often with reference to the significance of a single transformational leader (Leithwood and Jantzi, 2000; Wallace, 2002 and Bush, 2015). Therefore, much educational leadership literature has focussed on improving the skills, knowledge and competencies of emerging senior leaders and headteachers, usually with reference to transformational approaches to leadership.

This view of the heroic leader bringing about school improvement was challenged as being far too narrow as it ignored the contributions of the wider school community (Hartley, 2007). It was also recognised that schools are complex organisations and success or failure should not be solely accountable to a few individuals. Therefore, different concepts of leadership were constructed that were not just focussed on the individuals who held formal leadership positions (Boylan, 2018). It built on the notion that successful schools were the result of more participative leadership approaches (Harris 2004; Spillane, 2005; Timperley, 2005; Gunter et al., 2013).

Additionally, it became increasingly understood that the conventional hierarchical structure of a school was problematic, as responsibility and accountability were focussed only on those at the top. Such a concentration of decision-making power became increasingly difficult as the responsibilities of schools and the demands of the curriculum broadened. Thus, it became important to recognise that workloads and improvement activities needed to be the responsibility of a team of teachers, rather than that of one or two individuals.

Enacting leadership

The focus on leadership has ideally become part of a shared understanding amongst all staff in relation to the role that they play in contributing to what Bush (2015: 671) recently termed 'leadership density and capability', which is broadly captured under the term 'distributed leadership' (DL). This construction of leadership reflected the reality of how leadership was enacted in schools. Thus, leadership could be viewed as:

'A set of functions or qualities shared across a much broader segment of the school community that encompasses administrators, teachers and other professionals and community members both internal and external to the school. Such an approach imposes the need for school communities to create and sustain broadly distributed leadership systems, processes and capacities.' (Copland, 2003: 376)

The literature concerning educational leadership has tended to be descriptive or normative (Gunter et al., 2013). For example, the literature has either described how leadership practices *are*, or the

literature has proposed leadership strategies that should lead to improved educational outcomes. In this vein, distributed leadership was often promoted as a favoured leadership approach (Hartley, 2007; Parker, 2015). Schools in England responded by creating middle leadership roles as part of the process of distributing the leadership function across the school and to contribute to the capacity building of staff to bring about school improvement (Hallinger, 2011).

Both in the UK context and internationally, this dominant discourse of DL still prevails in much educational leadership literature despite criticisms that it was 'conceptually murky' (Lumby, 2016: 164) and that its relationship with school improvement and attainment levels has yet to be fully understood or evidenced (Harris, 2004 & Hartley 2007). More recently, however, the challenges of defining DL as a leadership approach have led to alternative interpretations that argue for its usefulness as a conceptual frame to understand how leadership is enacted within an organisation. As Lumby (2016) and Spillane (2005) have emphasised, 'What matters for instructional improvement and student achievement is *not* that leadership is distributed, but *how* it is distributed.' (Spillane, 2005: 149).

One way in which an understanding of *how* leadership is distributed is to develop further knowledge about middle leadership and how it is, or might be, enacted. As Bennett et al. (2003) and Wong et al. (2010) have highlighted, one of the main enactments of middle leadership is that of subject leader. Historically, there have always been teachers with a subject responsibility, but the onset of the National Curriculum and the need to interpret and implement it, gave the role greater focus (Hammersley-Fletcher, 2002). More recent curriculum developments have emphasised a move to a more knowledge-based curriculum, which has placed a new emphasis on the role of the subject leader and the large part it plays in middle leadership enactment within schools.

An extensive literature review from Bennett et al. (2007) summarised the growing body of literature concerning middle leadership in schools. This growth in research reflected and acknowledged the importance of middle leadership. It identified the tensions and some key issues for further exploration, including the dual role of the middle leader as a departmental leader and a strategic leader, and the contradiction of collegiality and accountability. Middle leaders and subject leaders therefore need to understand the ways in which these tensions manifest themselves so that these can be mediated in practice. This highlights the need for developing different leadership theoretical frameworks that can promote a reflexive approach for middle and subject leaders in helping them to understand their position. Indeed, as Morrison (2013: 414) has asserted, '...theory establishes a foundation that provides a framework for analysis, for decision-making and ultimately for action.'

Conceptualising leadership

What follows are the main conceptualisations of leadership drawn from the peer-reviewed literature that are pertinent to middle and subject leadership. These are important for helping to develop our understanding of middle leadership and subject leadership across different school contexts. These conceptualisations are evidenced-based as they are drawn from the research into middle leadership and the key findings and recommendations are then used to theorise how middle leadership is enacted and why certain approaches seem to be more effective than others. Therefore, these should not be thought of as being particular leadership styles that are consistently practiced; rather, these models can help school leaders to think about how they would want leadership to be developed in their schools, and to reflect on their existing leadership practices.

Collegiality and collaboration

The concepts of collegiality and collaboration are important to explore when developing understandings of middle and subject leadership. Collegiality and collaboration are a fundamental part of developing a strong professional identity amongst teachers and recognising the contribution that all teachers can make to ensure an effective department or team (Sachs, 2001). Both of these terms imply a more democratic and egalitarian approach to leadership that allows professional discourse to flourish. As Bennett et al. (2007) found, this was the preferred leadership approach of middle leaders especially when middle leaders were explaining their practices and the structure of their work.

Collaboration and collegiality are leadership activities that contribute to the development of distributed leadership (Harris, 2004) as they imply an egalitarian approach to developing professional practices that are agreed through a process of consensus rather than being imposed (Jarvis, 2012). This encourages teacher motivation and self-efficacy, with the leader playing a facilitative role in the development of a professional learning community (Freidman, 2011). However, it has been found that collaborative and collegial approaches have been in tension with accountability agendas and more performative approaches to leading and managing (Cranston, 2013). Additionally, collegial approaches at the departmental level often do not reflect the wider hierarchical and power structures in many schools (Hammersley-Fletcher & Brundrett, 2008). Despite these tensions, most subject leaders still espouse a collegial approach.

Systems thinking

Shaked and Schechter (2017) advocate that middle leaders need to develop an understanding of the whole system in which they are positioned. This is especially true given that schools are now part of different systems such as teaching school alliances that may be more dispersed (Close, 2016). This demonstrates the importance of recognising the relationships and interactions between the different components of the system, which could then be beneficial for devising solutions to the multifaceted issues that arise in organisations such as schools. Shaked and Schechter (2017) have offered four main characteristics for middle leadership:

‘(1) seeing wholes – a holistic point of view oriented toward seeing the big picture and not only its separate parts, conceptualizing all aspects of school life as one large system; (2) using a multidimensional view – the ability to juggle between several aspects of a given issue simultaneously, noticing a wide range of reasons for an issue’s emergence and existence, taking into account a variety of its consequences, and predicting various options for its future development; (3) influencing indirectly – addressing the school’s tasks and challenges circuitously, based on the awareness that countless reciprocal influences are at play among various elements within the school, each of which is connected to others, affecting them and being affected by them; and (4) assessing significance – the ability to evaluate components of school life according to their significance for the entire system, distinguishing between important and less important issues to be resolved. In line with the holistic essence of the systems-thinking perspective, these four characteristics should not be viewed as a linear series but as overlapping, interconnected, and interrelated capacities.’ (P.711 -712)

Adaptive leadership

According to Boylan (2007), Adaptive Leadership is an appropriate leadership model that reflects the complexity of the role of middle and subject leaders because of their position as 'sandwiched' between the senior leadership team and teachers. Adaptive leadership has its origins in the wider leadership literature (Heifetz et al, 2009), but it is more recently being espoused as being particularly pertinent for middle leaders. Based on his research, Boylan (2007) has proposed the model of adaptive leadership as being an effective approach because it incorporates this complexity comprising the following features:

Leader as innovator: adaptive leadership is not primarily about directing or motivating subordinates but rather about innovation through the propagation of new ideas often occurring through informal roles.

Leader as responsive and purposeful: adaptive leaders are embedded in contexts and leadership activity arises in response to challenges or needs such contexts present; thus the motivation to innovate arises from personal goals and needs and interdependence as much as from a single shared goal or vision.

Leader as networker: leadership is often informal and outside established structures often exercised through the development of networks through which ideas spread, thus adaptive leaders foster information flows.

Leader as system worker: adaptive leaders are adept at understanding and interacting with the complex systems they are situated in. (Boylan, 2007: 91-92)

Again, this is just a theoretical possibility derived from particular academic extrapolations from research that has been undertaken in schools.

Instructional leadership /learning-centred leadership / pedagogic leadership

The notion of Instructional Leadership is particularly pertinent to subject leaders as it is related to developing effective teaching and learning practices in the subject department (Poulter, 2007). These could be through the development of professional learning networks, or the need for subject leaders to consider leading professional development in their departments/settings and across the wider school networks (Boylan, 2006). In this sense, the subject leader needs to keep updated on specialist subject knowledge related to the curriculum content and the development of pedagogical practices; and it can be viewed as a leadership purpose rather than a leadership process (Bush & Glover, 2014). The recent moves towards a more knowledge-based curriculum, as espoused by the Department for Education, has highlighted the need for more instructional approaches to leadership.

Boundary managers

Middle leaders can contribute to school strategy through influencing those above (Chatwin, 2004). Recently a theoretical framework has emerged that offers an alternative to the systems thinking and explores the role of subject leaders as boundary managers (Somech & Naamneh, 2017). This builds on the work of Timperley (2005) who had established that middle leaders were boundary spanning between senior leaders and teachers in the completion of certain activities. Somech et al. (2017) have highlighted the importance of the mediator role when moving between boundaries and have found that the internal and external boundary actions of subject leaders can lead to the increased effectiveness of the team and the organisation. This is because, 'effective team management is such that it maintains a balance between managing the internal environment of the team and managing the environment outside the team boundaries.' (Somech & Naamneh, 2017: 2).

Key point summary

The evidence reviewed in this section on middle leadership has suggested that:

- An emphasis on leadership is associated with school improvement;
- Middle leadership is a mechanism for increasing the effectiveness of school improvement;
- It is important to consider the ways in which responsibility is distributed;
- Subject leadership is an enactment of middle leadership;
- Schools typically favour a collegial approach to improvement initiatives;
- It is important for all leaders to be aware of the multi-level and complex nature of school activity;
- Adaptability and sound subject-related pedagogy are important for middle leaders.

The different leadership frameworks highlighted enable the role of middle and subject leadership to be explored. They relate to both strategic (whole school) approaches as well as activity at the departmental/curriculum level. The following sections review the available literature in more detail relating to subject leadership and then middle leadership.

Leadership in relation to subject leadership

Leadership has been considered the second-most influential factor in enhancing student learning after classroom instruction (Brundrett, 2004; Leithwood et al., 2006). Subject leaders are responsible for the teaching and learning of their subject (Jarvis, 2008; Curtis, 2013); the organisation and management of departmental relations and resources (Friedman, 2011; Wenner and Campbell, 2017); and for modelling best practice (Curtis, 2013). The position of subject leader was initiated in 1998 through the publication of the National Standards for Subject Leaders. This document identified four key aspects of the role: strategic direction and development of the subject; teaching and learning; leading and managing staff; and efficient and effective deployment of staff and resources (TTA, 1998:4). However, as research into subject leader roles developed, arguments about what being a subject leader entailed were somewhat varied across schools (Hammersley-Fletcher and Brundrett, 2005; Harvey and Beauchamp, 2005; Beauchamp and Harvey, 2006; Jarvis, 2008). This was partly due to subject leaders' blurred understandings of the distinction between leadership and management (Turner, 2003; Friedman, 2011; Lahtero and Risku, 2012). Turner's (2003) and Bennett et al. (2005) literature reviews captured much of the work done on the topic in the late nineties and early 2000s, but were particularly focussed on secondary school education. Although not much literature on subject leadership has emerged since then, this section will build on the works of Turner and Bennett and colleagues: mapping the work that has been done on subject leadership in the UK more recently, both at primary and secondary levels, and attempting to clarify the role of subject leaders, uncover tensions faced by subject leaders, and identify gaps in the literature.

Primary education

The role of the subject leader

Primary school teachers' responsibilities for the curriculum have evolved through a variety of roles (Hammersley-Fletcher, 2002; Hammersley-Fletcher, 2004; Beauchamp and Harvey, 2006; Lambirth, Smith and Steele, 2012). In its early development, Lunn and Bishop (2002) argued that subject leadership had led to a cultural shift in primary schools, where subject leaders – who used to identify their role solely with classroom work – were now seen as leaders and managers. Hammersley-Fletcher (2002) explored subject leaders' perceptions of the role, as well as its practicalities. The study involved 20 subject leaders from 10 primary schools. Subject leaders were chosen on the basis of age (providing a range), experience and subject responsibility. Primary schools were selected from two local authorities and ranged in geographical contexts (rural and urban areas), size (from 44 pupils to 550 pupils), and Ofsted inspection outcomes (with one school being in 'special measures'). The data were collected through diary keeping – subject leaders kept diaries during four weeks in each of the three terms; semi structured interviews – subject leaders were interviewed three times, once each term; and observations – subject leaders were observed one day in each term. The results showed that the subject leader's role involved a range of different tasks, which could be categorised as encompassing:

- Resources: organisation, development, administration, movement and purchasing of information, equipment or resources;
- Documentation: planning, writing, developing and reviewing policies, schemes of work, action plans, job descriptions, and any other paper work associated with the role;

- Influencing practice: teaching other classes, advising individual colleagues on lesson content, demonstrating good practice and preparing for staff meetings;
- Monitoring: assessment procedures and standards, subject display, checking work and the appropriateness of subject materials, as well as classroom observation;
- Staff training: formal training needs of the staff, whether delivered by the Subject Leader or external agencies;
- Professional development: subject leader's own professional development, either through attending courses, through literature or through talking to other subject leaders or advisors;
- Liaison: discussions with the headteacher and conversations with colleagues, parents, pupils, governors, visitors, and other schools.

Hammersley-Fletcher (2002) argued that subject leaders were focussed on resource-related activities rather than anything more strategic, unless they were more experienced staff. Subject leaders also tended to avoid classroom observation and instead monitored planning and books. Subject leaders viewed the purpose of their role as situated around subject development, supporting colleagues, and administrative tasks.

Lunn and Bishop (2002) explored the conflicting role of being both a subject leader and a class teacher in a case study carried out in rural area in the north of England. The study involved interviewing subject leaders from core and foundation subjects twice, and then two core subject leaders and one foundation subject leader were interviewed a third time. The aim initially was to investigate the role of the subject leader inductively through a grounded theory approach; but as the interviews were carried out, the focus increasingly shifted to a focus on the conflicting nature of the teaching and curriculum role for subject leaders' professional identity.

The headteacher provided training to all subject leaders, and subject leaders reported on the key role that the headteacher played in supporting them, particularly with monitoring. The head in this school defined targets for subject leaders to meet when they were involved in classroom observations of colleagues. Subject leaders also found it helpful that the headteacher portrayed classroom observations as a learning opportunity, rather than an inspection of teachers' classroom practice.

However, there were many issues raised by the newly appointed subject leaders: they were full-time teachers, and they felt the new role, specifically the monitoring responsibility, was taking their time away from the classroom and students, which they considered to be their key purpose. Having said that, they were happy to carry out other forms of monitoring which did not involve leaving the classroom, e.g. looking at teachers' planning or pupils' workbooks. Still, the new formal roles increased the possibility of conflict between class teachers and subject leaders, who were previously used to working collaboratively and informally, and now had to provide formal feedback or have formal meetings, which had the potential to lead to conflict (e.g. as a consequence of a negative appraisal).

In addition, subject leaders were insecure about their subject and subject pedagogical knowledge, not feeling equipped to formally advise other teachers on the matter. Subject leaders also felt they were not qualified to monitor other colleagues. Furthermore, they felt that the new roles of subject leaders were leading them away from a culture of cooperation between staff, which had shifted towards one of forced collegiality within a formal hierarchical structure.

According to Hammersley-Fletcher (2004:37), subject leaders could effectively contribute to curriculum development and practice by:

- Engaging in curriculum and development planning;

- Clarifying the purpose and sharing good practice in curriculum planning through open debate with colleagues;
- Implementing the school's aims, values and policies;
- Developing an agenda of regular subject review and evaluation through the monitoring of subject practice;
- Providing colleagues with regular feedback from monitoring activities;
- Providing informal and formal curriculum advice and support for colleagues;
- Setting an example of good practice within their curriculum area;
- Seeking support in terms of time allocation and resourcing from headteacher and governors;
- Building the shared commitment of teachers, governors and parents to curriculum development.

Building on this work, Hammersley-Fletcher and Brundrett (2005) investigated headteachers' and subject leaders' views on subject leadership across two samples. One comprised of 12 schools, ranging in size (150 to 350 pupils), selected on the recommendation of four LEAs as examples of forward-looking approaches to subject leadership. The second sample included 10 schools which responded to the NCSL's "ldr" magazine's call for schools that would like to volunteer to share their models of leadership. These schools were selected on the basis of having students in Key Stages 1 and 2 and evidence of interesting leadership practice, and ranged in size (94 to 580 pupils). For the first and second samples, interviews were conducted with the headteacher, one subject leader of a core subject, and one subject leader of a foundation subject. In the second sample, data was also collected through the collection of short written statements on personal philosophies of leadership. which they described as:

'...Having good subject knowledge; having a high level of interpersonal skills; being enthusiastic and a motivator (having ideas and sharing thinking); being a good role model and subject practitioner; leading an area of school life in ways that relate to whole school approaches; developing others' expertise and being approachable (...) maintaining and developing resources; keeping records and evidence of progression; meeting standards through monitoring; and keeping their subject knowledge up to date.' (Hammersley-Fletcher and Brundrett, 2005:67).

Both headteachers and subject leaders in this study saw subject leadership as having the potential to develop a vision for a subject and to enact that vision through a whole school approach, emphasising the importance of leadership styles which promote collaboration between staff and the delegation of responsibilities. Still, subject leaders perceived the headteacher as the main leader, ultimately defining the extent of their actions.

To summarise, despite the evolving role of subject leaders in primary schools, their key responsibilities appeared to revolve around resourcing, documentation, influencing practice, monitoring, staff-training, professional development, and liaison. Perceptions of the role of subject leader highlighted the importance of subject knowledge, subject pedagogical knowledge, and the ability to model and share good practice; as well as curriculum development, through the creation of a vision for the subject that integrates well with the school's aims, values and policies. Monitoring – particularly in the form of classroom observation – although understood as a key responsibility, seemed to make subject leaders uncomfortable due to the potential it has to create conflict, alongside the perceived lack of qualification to perform such a role. As a consequence, more indirect ways of monitoring were preferred, such as looking through teachers' planning, or pupils' workbooks; although we recognise that this data is dated and does not reflect our recent personal (and as yet unpublished) observations in schools, which indicate a greater willingness to engage in the monitoring of classroom teaching. The

relationship with the headteacher came across as an important one, both in acquiring support to perform the role effectively, and in creating a vision for the subject that fits the whole school approach.

The subject in subject leadership

A key theme in the literature on subject leadership is the relevance of the subject (Burch and Spillane, 2003; Spillane, 2005; Spillane and Hopkins, 2013). While many of the issues relating to managing subject areas appear to be generic to all subject leader roles (Bolam and Turner, 2003), the literature hints at areas where differences might occur. Within the primary phase, subject leaders were not necessarily subject specialists (Hammersley-Fletcher, 2002; Lunn and Bishop, 2002; Burton and Bundrett, 2005;) and there were issues in terms of different subjects carrying varying levels of curriculum focus and importance. It is well known that core subjects receive greater attention and resources than non-core subjects (Hammersley-Fletcher, 2002; Beauchamp and Harvey, 2006; Lambirth, Smith, and Steele, 2012; Spillane and Hopkins, 2013). There also appear to be differences in the amount of time and resources allocated across the different core subjects. In the United States, Burch and Spillane (2003) found that leadership in mathematics differed from leadership in literacy in terms of time allocation, staffing and professional development. In addition, Spillane and Hopkins (2013) found that in U.S. elementary schools, senior leaders were more heavily involved in the development of literacy than mathematics, which in turn was invested in more than science initiatives (ibid).

Differences were also found in terms of the nature of leadership practices. Burch and Spillane (2003) found that leadership in mathematics differed from leadership in literacy in terms of staffing and professional development, as well as in terms of epistemological differences (nature and structure of knowledge in each discipline). Spillane and colleagues draw upon Grossman and Stodolsky's (1994) dimensions along which subjects might differ: definition, scope, sequencing of material and whether the subject is static or dynamic, concluding that instruction is not 'monolithic', but subject-specific (Grossman and Stodolsky, 1994: 722). Burch and Spillane (2005) found that leaders tended to view instructional leadership in literacy and mathematics differently. In literacy, the emphasis was put on school-based support and collaborative working, drawing upon expertise across the school. In mathematics, external provision was more valued, e.g. adoption of external schemes of work and formal training. However, those leaders who spent more time with teachers realised that integration of external and internal support was most effective.

Furthermore, differences were found in terms of advice seeking structures, with literacy leaders being sought out more for advice than mathematics leaders, who in turn were sought out more than science leaders (Spillane and Hopkins, 2013). Mathematics leaders were found to also be involved in 'brokering'. While literacy expertise was considered to be distributed evenly across the school, mathematics expertise tended to be associated with the upper grades. There may also be differences in terms of the particular concerns raised by other staff about particular subjects which subject leaders need to address. Burch and Spillane (2005) noted that leaders of mathematics emphasised the need to deal with teachers' anxieties surrounding the subject. While there is very little mention in the literature of the need for subject leaders to explore teachers' attitudes to their subjects, research suggests that attitudes have a profound impact on teaching (e.g. Watson, 2012) and therefore we would argue that this is an important area for subject leaders to address. Pulling together the findings from the body of work described above, the subject may define how instruction is organised, which influences the interactions between teachers as well as the leadership routines, culture and norms,

relational structures and interaction patterns between teachers and subject leaders (Spillane 2005; Spillane and Hopkins, 2013).

Although there appears to be a gap in the literature on how the subject influences subject leadership in primary schools in the UK, two studies focussing on particular subjects were found, and may shed some light on the importance of the subject. Beauchamp and Harvey (2006) interviewed three music leaders, one from each of the three primary schools (one from a rural setting and two from urban areas), selected for their good results in music provision in Ofsted evaluations.

Findings were organised in six categories: relationship with senior management; perception of roles; management responsibilities for music; comparison with other subjects; professional development; and how music differs. The senior management team (SMT) seemed to have a key influence on subject leaders' perceptions of their role. Subject leaders saw themselves mostly as implementing policies and initiatives developed by the headteacher, and had difficulty defining their role in terms of leadership and management. All subject leaders described their management roles in terms of resourcing their subject, mainly making suggestions, as decisions were restricted by factors such as budget. Still, all respondents felt they could ask for higher budgets, as they perceived headteachers valued their subject.

Subject leaders' responsibilities as music leaders fall into six categories: resources (ordering, maintaining and organising); accountability (monitoring/ schemes of work); supporting staff/INSET; involvement of peripatetic staff; extra-curricular activities; and organising concerts (Beauchamp and Harvey, 2006:12). All three subject leaders mentioned they were perceived by other teachers as someone who has a special ability, and much of their work as subject leaders involved supporting teachers who did not feel confident or were lacking subject knowledge, which the authors argued should be a focus of their professional development.

However, the lack of professional development for music subject leaders was highlighted, because professional development opportunities were prioritising the needs of non-musicians. Whilst they felt comfortable with their subject, it isolated these subject leaders in terms of broader leadership knowledge. As the authors put it, 'whilst subject leaders may not need extra training in arranging, conducting or rehearsing a school ensemble, this does not mean that they do not need further training in curriculum development or in how to lead and manage colleagues' (Beauchamp and Harvey, 2006: 18). Music was considered different in the sense that it had a very public position in the schools (due to concert, extra-curricular clubs, etc.), but, by nature, music also has a very personal dimension. In addition, due to the teachers' insecurities regarding subject knowledge, extra-curricular music sessions were of higher quality than the general music curriculum, because the former were delivered by the music subject leaders.

Lambirth, Smith and Steele's (2012) study provides insight into what leading literacy, particularly poetry, in primary schools might entail. The study involved 10 literacy subject leaders, selected using purposive sampling based on schools and subject leaders that the research team knew. The schools varied in socio-economic status and geographical locations, ensuring schools were in a variety of contexts, with different concerns and priorities.

The authors found that subject leaders were considerably knowledgeable about teaching poetry within their schools. Most leaders drew on resources from the Primary National Strategy (PNS) to plan their instruction. However, the PNS was seen to have a conflicting effect on poetry in schools: it ensured its inclusion in the planning, but at the same time restricted its delivery to particular times of the year. Subject leaders spent much of their time organising and acquiring resources for the subject,

which was also seen as being influenced by the PNS, who demanded a diversity of texts that included poetry. The aspect of poetry discussed most frequently by subject leaders was the writing of poetry, and the development of resources to promote this skill.

The nature of the subject influenced how it was planned: poetry is taught around other units of work, with the possibility of being dropped altogether if priorities changed; for example, the need to focus on writing, or to assess students' progress. In addition, subject knowledge seemed to have an impact on the teaching and learning, as Ofsted (2007, cited in Lambirth, Smith and Steele, 2012) had stated that teachers reduced knowledge on poetry was having a negative impact on the subject's instruction.

Two of the subject leaders were at the time undergoing continuing professional development (CPD), which focused on literacy and provided these leaders with the tools to create a framework where literacy was integrated within a cross-curricular approach. They then brought this into their schools and implemented it, which the authors emphasise was only possible because the headteacher was on board with the new initiative. CPD was highlighted in the study, as a way to further teachers' knowledge of poetry, enhancing their confidence and experience in teaching the subject. In schools where poetry had already been implemented successfully, subject leaders talked about the resistance they had first experienced from other teachers. Subject leaders dealt with this in a positive, supportive and flexible way, by finding moments to work on the content (e.g. reading groups where poems were analysed); and giving teachers choice over which poems to use in the lessons, (so that they worked for both the class and the teacher), and by making themselves available for advice. By using such strategies, subject leaders increased teachers' confidence in the subject and promoted personal involvement.

Evidence from Australia on leading numeracy in remote and very remote primary schools might be relevant for a more in-depth analysis of the role of the subject leader. Jorgensen (2016) reported on evidence from 32 case studies, which involved interviews, lesson observations and analysis of school documents. Jorgensen (2016:34) found that, in order to contribute to subject development and teaching and learning of mathematics, subject leaders have to:

- Have strong mathematical content and mathematical pedagogical knowledge;
- Mediate the vision of the leadership team so as to enact the envisioned practices with the classroom teacher;
- Provide support and insights into collecting, using and interpreting data to develop strategies based on evidence;
- Support teachers to develop differentiation strategies to cater for diversity within the classroom;
- Acquire a high level of trust, respect and autonomy from and of the staff;
- Work with the leadership team to provide feedback and input into the future direction and needs of the school and mathematics programs;
- Make sense of the social, cultural and political contexts which they work in, in order to make informed choices in relation to their practice and to understand the actions and reactions of others.

Jorgensen (2016) found that in remote areas there are many early career teachers, who are in need of a considerable amount of mentoring and professional support. The author argues that classroom support should be practical and shaped by the needs of the teachers and their students. Examples of supporting activities included: after school workshops; feedback on lesson observations and modelling of good practice; and assistance on collection and interpretation of student data, followed by development of programmes with teachers based on these results.

The responsibilities of numeracy leaders were influenced by the senior management team and the whole school context, and they functioned as the link between the executive, the team and the classroom teachers. The conflicting aspect of having to work cooperatively with teachers as well as having to monitor their practice was also mentioned. It was found that having credibility and being valued and accepted by other teachers increased the success of subject leaders. This status was best accomplished if teachers were subject experts, both in terms of content and pedagogical knowledge.

To summarise, this section highlights the importance of the subject for subject leadership. Besides the importance given to subject knowledge and subject pedagogical knowledge, much research on the topic, particularly from the US, has shown how the subject influences organisation of instruction, i.e. staffing and time allocation; professional development provision; leadership routines; and interactions between staff.

Research in the context of particular subjects seemed to support some of the key responsibilities previously listed, i.e. resourcing for the subject, monitoring, and supporting staff. In the case of music and poetry, it appeared as though the support needed from subject leaders was primarily related to subject knowledge. In the case of literacy, the support seemed to be more relevant to addressing the needs of early career teachers and mentoring them. In these studies, professional development was seen as useful both in terms of subject knowledge enrichment and in equipping subject leaders with the skills to provide assistance to colleagues. The relationship with the SMT was also considered important when looking at particular subjects, as it appeared to influence subject leaders' perceptions of their role, enable the implementation of subject-specific initiatives, and the creation of a vision for the subject within a whole-school approach. Still, there were some differences within each subject in regards to the responsibilities of the role. In the case of music, subject leaders managed the involvement of peripatetic staff, provided extra-curricular activities and organised school concerts and events. Poetry subject leaders' key challenge was planning; poetry is taught around other units of work and, depending on other priorities, it can be pushed back or dropped altogether.

Issues arising

The review of literature on subject leadership in primary schools uncovered some tensions inherent to the position. In addition, it has also exposed many gaps in the research on subject leadership. Identity was a key theme within primary school leadership, as it was perceived as directly conflicting with teachers' identities as classroom practitioners. It would be interesting to look into this further, 20 years after the establishment of subject leadership in primary schools, in order to understand whether the role has become embedded in the culture of teaching in primary schools and is seen as part of a teacher's role, rather than in addition to it. It would also be interesting to compare perceptions of subject leaders who are new to the role with those of more experienced subject leaders.

The other aspect of the role which subject leaders appeared uncomfortable with in these studies was the tension between needing to hold teachers to account while also wanting to foster a culture of cooperation. Subject leaders particularly disliked monitoring colleagues, both because it had the potential to create a negative environment and because they did not feel qualified to do so. Again, it would be helpful to look beyond our anecdotal sense that this has shifted significantly, to consider how monitoring is perceived nowadays, and whether subject leaders are now doing more classroom observation rather than focusing on other indirect strategies, as these studies have shown.

Another point of interest would be whether subject leaders find they are receiving appropriate training. Are they better qualified and able to demonstrate strong expertise in their subject and subject-related pedagogy? The whole-school context, and the relationship with the headteacher, seemed have both an enabling and a constraining role. It could be useful to find out if/how these relations have changed, and how subject leaders can make the most of the structure they work in.

The different research studies found in the literature were conducted in a mixture of rural and urban areas, and different types of setting. Consequently, it is not possible to make inferences regarding particular areas or types of school. It would be helpful to look into particular areas and settings, in order to unveil possible contextual differences.

Finally, external pressures were mentioned in much of the literature, although the nature of these pressures will be outdated to some extent. It would be useful to consider how today's subject leaders are managing external agendas in relation to their role.

Key point summary

The evidence reviewed in this section in relation to subject leadership in primary schools has suggested that

- There may be blurred understandings of subject leader roles despite evidence that they are important to learning;
- Teachers may be resistant to monitoring and evaluating their colleagues although it is noted that this may be an outdated finding;
- Subject leaders need to develop a vision for the subject which should then inform wider school development;
- Subject leaders in primary schools may not be subject experts and may lack confidence as a result;
- There are differences between subjects in terms of emphasis and time allocations, although data is lacking here;
- Expertise in the subject is related to improved subject delivery
- It is vital that headteachers facilitate both subject development and time for dissemination of knowledge to other staff.

Secondary education

There is also a large gap in the literature researching the area of subject leadership in secondary schools (Aubrey-Hopkins and James, 2002; Ritchie, MacKay and Rigano, 2006; Ribbins, 2007; Poultney, 2007). However, the role seems to differ from its primary counterpart in two key aspects: teachers are almost always subject specialists (Spillane and Hopkins, 2013), and subject leadership takes place within departments which have their own identity and culture (Turner, 2003; Harvey and Beauchamp, 2005; Ghamrawi, 2010; Friedman, 2011; Childs, Burn and McNicholl, 2013; McNicholl, Childs and Burn, 2013; Chow, 2016).

The role of the subject leader

Aubrey-Hopkins and James (2002) explored the experiences of subject leaders in secondary school departments in South Wales. The authors interviewed a sample of 17 subject leaders of Mathematics,

English, Modern Foreign Languages (MFL), Science, History and Welsh from a mixture of different comprehensive schools. The project found that subject leaders used a variety of strategies to influence practice, some of which were more effective than others. Amongst the effective strategies were:

- Involving the department in initial teacher education, which promoted reflection with older departmental members, and allowed trainee teachers to provide innovative ideas for practice;
- Using departmental policies to maintain high standards and consistency in departmental practice;
- Involving department members in decision making, which promoted engagement with projects and ensured a range of expertise useful in problem-solving;
- Promoting collaboration, which, although it took place less often than perceived by subject leaders, was considered effective;
- Promoting participation in INSET activities, particularly if these were catered specifically for attendees;
- Assigning classes from different ages, abilities, and pupils;
- Delegating tasks;
- Monitoring practice and promoting peer observation.

Strategies that were less successful involved: using school inspection feedback; formal and informal communication; and particular formal discussion with individual members of staff when performance was not satisfactory. Target setting was considered important, but not a factor when influencing practice. Key difficulties faced by these subject leaders were gathering evidence of poor performance by department members and then trying to influence their practice (e.g. addressing missed deadlines and ineffective teaching), but also managing staff that were overly eager to take on responsibilities at inappropriate stages of their professional development.

Chatwin (2004) interviewed 32 subject leaders across six English secondary schools to find out how subject leaders can exercise influencing upwards, making use of the organisation's structure. The study aimed to show that leadership is not an individual activity, and that subject leaders still have the potential to be transformational in the level they are working at. The author identified seven key skills:

1. Ability to capitalise on multiple memberships and layered involvements in school matters;
2. Ability to frame issues in a reasoned and persuasive fashion;
3. Political competence, building and maintaining alliances with different stakeholders;
4. Strategic influencing skills;
5. Strategic problem-solving and decision-making skills;
6. Ability to build a support base, e.g. across subject departments;
7. Understanding the consequences of different actions on the school.

Factors which were found to limit subject leaders power to influence change within higher levels of leadership in secondary settings were: ideological dissidence, a complaint approach, being untrustworthy, and having an underdeveloped influencing technique. Crucially, the enabling role of senior leaders is highlighted as influencing the role that subject leaders can play in contributing to strategic outcomes. Chatwin (2004) concludes by highlighting that subject leaders can take advantage of the different memberships and multiple levels of involvement within the school, although their ability to act is still dependent on the type of organisation within which they work. This is a point related to issues raised in primary schools about the power of the headteacher acting as a facilitator.

The school leader in primary settings is clearly linked to organisational behaviours in a more immediate way than in secondary schools where the senior leadership structure tends to be broader.

Poultney (2007) explored the role of subject leadership in secondary schools, and perceptions of key stakeholders around what makes an effective subject leader. The study involved 11 schools, ranging from successful independent and comprehensive schools to schools in special measures. Data was collected through questionnaires and telephone interviews. 159 subject teachers, 85 subject leaders and 41 senior teachers took part in the questionnaire, and five senior teachers, five subject teachers and seven subject leaders volunteered for the follow up telephone interview stage. Two dimensions of subject leadership emerged in the data: team leadership – encompassing subject leader’s personal characteristics of leadership, instructional skills and strategies, organisational/managerial skills, and transformational qualities; and whole school leadership – subject leadership across school and with senior teachers. Issues of importance to subject leaders at that time were therefore around,

- Personal characteristics of an effective subject leader: good interpersonal skills; ability to build effective relationships based on trust with the department team and the SMT; ability to show emotional intelligence, being approachable/ non-threatening.
- Instructional skills and strategies: good effective teachers, with sound subject knowledge. Instructional leadership was viewed as the main purpose of the subject leader’s role, and sharing pedagogical strategies, particularly regarding disciplinary issues, was given high relevance.
- Organisational/managerial skills: ability to establish and manage working routines and, indeed change, in the subject department as well as the subject leader’s own teaching load
- Transformational qualities: ability to promote collaboration within the department and whole school context; facilitate professional development for department members
- Leadership across the school and with senior teachers: stakeholders agreed that subject leaders who took a school-wide approach enhanced both communication across schools and a shared sense of purpose. In addition, teachers saw this as a way to enhance the position of the department, which senior teachers believed to be good practice – increasing inter-departmental competition and consequently, raising whole school standards.

Ribbins (2007) provided an account based on an ethnographic study carried out in the Design Studies department of a secondary school in England, 1985. The study looked at a subject leader who successfully influenced practice in his department. Department members saw him as having markedly improved the department by raising the status of the department in the school and making it highly regarded by staff. Consequently, this subject leader elevated the department members’ morale. The teachers also praised the subject leader’s strong personality, subject knowledge and teaching expertise, and reported that he had developed the department members professionally. When analysing his leadership style, the subject leader talked about the importance of, from the outset, having worked on a vision and philosophy for the department, in cooperation with the department members. This philosophy was expressed through the creation of a syllabus where the aims of the subject were defined, alongside a vision for Design Studies which fitted with the whole curriculum and shaped pedagogy in the department. In observations carried out for this study, it became clear that department members were aware of the vision for the subject and committed to its implementation. The subject leader supported collegiality and was a supportive, yet also demanding, leader. In fact, he saw himself as an effective leader, keeping strictly professional relations with department members, and dealing swiftly with unsatisfactory performance. In addition, although he was open to staff contributions, he did not aim to be a democratic leader. An important factor of his leadership was

monitoring, which was a two-way activity – department members could also go into his sessions and appraise his practice.

Jarvis (2008) also looked at the influence of subject leaders in department members' classroom practice. The study was based in three schools (one independent co-educational boarding and day school, private co-educational boarding school, and one state grammar school) in England. 15 teachers from Humanities and Science departments were involved, six of them were heads of department. Data was collected through interviews and classroom observations. When asked to describe their role, subject leaders had difficulty defining it in terms of leadership and management. Additionally, subject leaders were reluctant to use the term 'leader' to describe their role, with the feeling of powerlessness being a key theme emerging from the interviews. Subject leaders found themselves stuck between their department and the SMT. It is perhaps not surprising that the role of motivating the department was seen mainly in social terms (e.g. organising thank you cards). Department members' interviews unveiled they were unsure about what the role of the subject leader entailed, seeing it as mainly administrative and managerial (in line with subject leaders' responses). There were mixed responses regarding the impact subject leaders had in motivating department members, and these seemed to reflect a superficial understanding of team work. Department members reported that subject leaders had very little influence on their classroom practice. The lesson observations confirmed the above findings – there was no consistency in the input and teaching approaches used and the level of planning and preparation for the sessions. The author concluded that the role of subject leader 'represents a missed opportunity for leadership' (Jarvis, 2008: 29).

In order to shed some more light on the role of the subject leader in secondary schools, evidence from Lebanon may be useful. Ghamrawi (2010) carried out a study in three private co-educational secondary schools, in Beirut. Schools were selected based on their effectiveness (measured by student achievement). The study involved three head teachers, seven subject leaders and seven classroom teachers, who were interviewed three times, leading to a total of 51 interviews. The work aimed to find out how subject leaders might encourage or restrict teacher leadership in their subject departments. Firstly, the results defined 15 common aspects of the role carried out by subject leaders in these schools: pedagogical expert; staff developer; action researcher; change agent; proficient raconteur; managed leader; policymaker; cultural developer; resource manager; curriculum developer; strategic planner; quality controller; liaison; problem solver; and data manager. Secondly, the study found three different ways in which subject leaders influenced shared leadership: creation of sub-cultures, based on collegiality; establishing leadership exchange structures (cyclical subject leadership was an example of a strategy for this end); 'walking the talk' of a shared system of teacher monitoring and evaluation, ensuring a system that serves this purpose is in place and put into practice.

Friedman (2011) looked at the possibility of subject leaders to carry out transformational leadership. The study was conducted in Israel, and involved five schools, ranging in socio-economic status, prestige, location, size, ethnicity, staff attributes and prevailing values and norms. The author spent four to five weeks in each school, and, in that time, she interviewed the English subject leader twice (at the beginning and at the end), the headteacher and two to three teachers in the English department. Besides interviews, observations of formal meetings and informal encounters were also conducted. Friedman found that there was a discrepancy between the literature defining subject leaders as transformative and the reality of the role in secondary schools. The subject leader's role was markedly defined by the headteachers, as well as the extent of their actions. Still, there were ways in which the subject leader influenced the department. In the departments studied, subject leaders were seen as motivational figures, sources of teachers' self-efficacy and facilitators of the department

as a professional learning community. Department members perceived subject leaders as motivational when they communicated high expectations, promoted collegiality, acted as a role model, managed unpredictability, adapted curriculum change to whole school approaches, and were trustworthy (:295). Subject leaders promoted teachers' self-efficacy by being approachable (which was often time constrained) and modelling effective behaviour (:296). They facilitated the department to become a professional learning community through school INSET days (although these mostly reinforced the school vision), departmental meetings (although productive discussions were often time consuming and therefore left aside), monitoring (which was done informally, in order to preserve collegiality), and the development of a nurturing environment (: 297, 298). The constraints on the role identified by Friedman, appeared to be related to identity (subject leaders still saw themselves first and foremost as classroom teachers, and this role was conflicting with this primary role), time (subject leaders still had heavy loads of teaching hours), and the lack of a clearly defined role and expectations. As a consequence, rather than expanding the curriculum, they restricted it, and instead of engaging in transformational activities, the subject leader's role tended to centre around mainly managerial and administrative tasks.

To summarise, although there are no studies set in the UK defining the responsibilities of subject leaders, considering an international perspective, Ghamrawi (2010) listed them as: policy development, planning, resourcing, action research, staff development, quality assurance, data management and professional development. The literature highlighted the qualities subject leaders need on a personal (e.g. good interpersonal skills), instructional (e.g. good subject and subject pedagogical knowledge), organisational (e.g. ability to manage and change departmental working routines) and transformational (e.g. facilitate professional development and collegiality) level, in order to effectively carry out their role. It is also possible to highlight efficient ways in which subject leaders influenced practice. These included creating a vision for the department which is embedded in the wider school's vision; promoting collegiality; being supportive to department members; and monitoring. Subject leaders were shown to be supporting staff using a range of approaches. The subject leader in Ribbin's research was formal and comfortable in his position as a leader, whereas in Jarvis (2008), there appeared to be uncertainty about the leaders' role and staff felt like subject leaders had no influence on their practice. The creation of a departmental vision seemed to be effective in promoting consistency between department members in classroom instruction. In Ribbins' (2007) study, all departmental members had a consistent approach to teaching and learning as a consequence of their participation in the creation of a vision for the department and the sharing of this vision through a subject manual. The consequences of not having a well-established and shared vision can be seen in Jarvis (2008), where practice varied widely between staff, and negatively impacted on the teaching and learning of the subject. Supporting strategies varied, e.g. planning of INSET activities tailored to the members of staff attending or sharing pedagogical strategies. Monitoring was mentioned in all studies as an important aspect of subject leadership, but it was only discussed in detail in one study, in which subject leaders preferred informal ways of monitoring, which were seen to preserve collegiality. The importance of senior leaders as enablers for subject leaders was also highlighted. Finally, there appeared to be different views as to how transformational subject leaders can be, within existing school structures.

The subject department

Turner (2003: 215) argued that 'it is extremely difficult to disaggregate the subject leader from the department in which he/she works'. These units of work are complex in that they are built on social

relations within a formal educational context, with embedded 'hierarchies, power relations, micro-politics, expectations, and norms' (Puttick, 2017: 63). Busher and Harris (2000) organised departments in four categories: federal (if similar subjects were grouped together), confederate (comprised of heterogeneous subjects), unitary (constituted by single subjects), and impacted or diffuse (containing few members who might teach different subjects). Bolam and Turner (2003) found the size of the department and its physical location in the school were influencing factors in the quality of teaching and learning. Puttick (2017) argues that beliefs about the subject taught are partially formed within departments, through the daily interactions with other colleagues. These units are also powerful in igniting change in schools (Ritchie, MacKay and Rigano, 2006), with the potential to become learning communities, driven by collaboration and shared practice (McLaughlin and Talbert, 2001; Childs, Burn and McNicholl, 2013).

Harvey and Beauchamp (2005) interviewed subject leaders of music departments in three secondary schools in England. All three schools were 11-18, had over 1200 students, and were chosen based on a recent Ofsted inspection reporting a good standard from music teaching. When asked about their perceptions of the role, subject leaders had split views, with some emphasising the management and others the leadership aspect of the role. Management tasks involved: instrumental tuition, organising school concerts and house music, liaison with primary schools, dealing with examination entries, organising music tours, allocation of resources and performance management (Harvey and Beauchamp, 2005: 56). Other management tasks were organising the peripatetic instrumental scheme, planning concerts, financial management, student discipline and music tours (Harvey and Beauchamp, 2005: 57). Leadership activities included creating new initiatives and implementing them, producing new ideas and curriculum planning. Subject leaders found it difficult to distinguish between leadership and management. One of the headteachers emphasised the value of collaboration as the philosophical ground for their work, this same subject leader thought that differentiating between management and leadership in such a small department was unhelpful. He also highlighted the importance of the subject when organising instruction. Teachers in his department seemed to work very closely, often sharing classrooms or visiting others' sessions to provide individual help to students that might need it. As a consequence, teachers were comfortable with having colleagues in their classroom and this made monitoring easier. All subject leaders valued peripatetic staff as knowledgeable and able to provide useful insight to the department. In all cases, the relationship with senior leaders was positive, and subject leaders felt they were trusted to do their work independently. The issues subject leaders referred to were often concerned with the whole school system, which created time restrictions, for example, having to write meeting minutes. In addition, there were at times clashes with other departments, often caused by music being thought of as a less important subject. All subject leaders lamented the lack of meaningful professional development opportunities.

Childs, Burn and McNicholl (2013) explored the ways in which subject content knowledge and pedagogical content knowledge was created and shared. The study looked into four subject departments (two science, one history and one geography) in three different schools, which were selected based on their effectiveness in promoting student learning, inclusion of teachers with a range of experience, and clearly defined departmental base/tea room. Data was collected through participant observation and semi-structured interviews with all departmental members. The results show that there was a similar culture between the science and geography departments, but that the history department differed in this aspect. Science and Geography departments promoted collegiality through the nurture of a safe space where staff could be honest and ask for help, which happened often. There was cooperation between staff, which seemed to promote an innovative approach to teaching, as they were not afraid to take risks. On the other hand, the culture of the history

department was one of independent work, where collaboration happened episodically. Curriculum planning for the subject was the type of work that was seen by department members as cooperating, which had happened in departmental meetings at the start of the year. The key factors in collaborative departmental learning for pedagogical content knowledge were the status and organisation of the subject, the leadership style, and the presence of a room to sit and have a drink together. The authors highlight issues in relation to initial teacher education; increasingly student teachers carry out their training in school; the authors highlight the question of whether the interactions found translated into quality teaching and learning.

Once again, research from elsewhere can be useful in thinking about subject leadership. Ritchie, MacKay and Rigano (2006) explored the leadership dynamics in two science departments from two different schools in North Queensland, Australia. The study involved a co-educational secondary school and a Catholic secondary school. Data was collected through surveys, interviews and lesson observations. Involved in the study were the headteachers from each school, the subject leader from each department, and the department members. Headteachers and department members were interviewed once, and subject leaders were interviewed five times (four of those times were follow-ups from lesson observations). The study found similarities in the leadership roles of the two subject leaders:

- Monitoring assessment tasks and standards;
- Modelling desired practices that were consistent with subject leaders' articulated visions for science education;
- Filtering through external policies/initiatives and applying them to the context of the department;
- Seeking external information that may benefit the department and science education, creating networks which can be helpful in subject leaders' professional development,
- convening staff meetings.

However, there were differences in the way subject leaders approached their role, and this seemed to be related to how they saw themselves in their position. One of the subject leaders, Jane, saw herself as a 'salesperson' (Ritchie, MacKay and Rigano, 2006: 152), having to sell the discipline to students, and policies to staff. Her leadership method was subtle, but interventionist: she matched staff with complementary skills and attitudes. This meant that, when carrying out curriculum planning, staff were assigned particular units and matched in accordance to their particular strengths. Also, when necessary (e.g. if trying to implement changes), she would match a member of staff who was presenting resistance to that change with a member of staff whose beliefs aligned with hers. In the case of Dianne, the other subject leader, the approach was very different. Dianne saw herself as a 'secretary' (Ritchie, MacKay and Rigano, 2006: 152), describing her role in managerial terms. She left teachers to decide the topics they would like to work on, and who they would like to work with. This normally meant that specialists from different topics (e.g. biology, chemistry) would work together and plan their topics across the curriculum. This was a less interventionist style. Besides the leaders' approach, the school structure also seemed to influence collaboration and curriculum planning, particularly timetabling and the presence of a shared staff room. In Dianne's case, timetable constraints only allowed for meetings before the school day started, and the science department did not share a room where they could gather; this meant that staff mostly liaised with the colleagues they were paired with. In addition, department meetings only took place once every three weeks, and due to time constraints, there was no room for in depth discussions, whereas in Jane's case, there was a staff room for the whole department, and they saw each other frequently. What is more, they met every Friday, and without time constraints, issues were analysed and discussed in depth. Although

both departments enabled collegiality and distributed leadership, it was evident from staff's responses that providing opportunities for staff to gather with the subject leader and engage in discussions regarding policy and practice was much valued by department members.

Due to the small samples in each study, the findings cannot be generalised. However, in an effort to tentatively summarise these findings, the specific subject responsibility has again emerged as an important factor influencing the status of the department, its organisation, and the organisation for instruction. Collaborative learning in different departments, appeared to be dependent on the status and organisation of the subject, the leadership style and the presence of a room to gather in and share a coffee. In Childs, Burns and McNicholl's (2013) study, it was found that there were different approaches to departmental collaboration: the higher status department had an independent approach to collaboration, in which decisions were made at the start of the year, and then department members were autonomous in their decision-making and problem solving for most of the academic year. The approach taken by the lower status departments was one that promoted dialogue and collaboration on a daily basis, and where there was a safe space for asking questions and taking risks. However, Ritchie, MacKay and Rigano's (2006) research showed that the same subject department can have different collaborative and working practices, depending on the subject leaders' approach to leadership and school level structure (timetabling, staff room available). The example of subject leadership in a music department illustrated the responsibilities these leaders had which related specifically to their subject: organisation of concerts and music tours, managing peripatetic staff, and delivering instrumental tuition.

Issues arising

The literature unveils some tensions related to the role of the subject leader as well as some notable gaps in the literature. The complexity of the role appeared to be a point of tension, as subject leaders perform many different activities in addition to their teaching responsibilities and are involved at different levels in a variety of school matters. Adding to this complexity, there appears to be a clarity issue: subject leaders and department members are unsure of what the role means or entails. It would perhaps be helpful to look further into this issue, finding out what subject leaders and other stakeholders perceive the role to be, including accounts from different departments. In addition, it would also be interesting to look into professional development opportunities for subject leaders and how these might help to provide clarity and foster confidence in future leaders. Leading from the middle of the school structure also seemed to be problematic, raising questions regarding the extent to which subject leaders can actually make a change. This is further complicated when factoring in external pressures, such as government initiatives. Further research could help clarify these issues, pinpointing if and how subject leaders can act as catalysts for change, and looking into possible ways in which this transformational role might be fostered or hindered (e.g. the potential impact of the specific department or school on subject leaders' capacity to effect change). Relationships within and between departments are complex. Department members have high and different expectations from their subject leaders, while subject leaders are caught up between the, sometimes divergent, aims of supporting colleagues and monitoring their performance; similarly, subject leaders are wrestling with the tension between a desire to respect department members' professional autonomy and a requirement to push them to change their practice. Interdepartmental tensions can also be found in the literature, and they seem to be related to the conflicting narrative of departmental cooperation and active promotion of departmental competition, as well as the perceived higher value of particular subjects. It would perhaps be helpful to look into ways in which these differences and complexities

can be managed in order to promote effective cooperation within and between departments. Departments also seem to have different levels of status in schools, and further research is required to understand whether subject leaders of higher status departments have more power to lead and opportunities to make changes.

Key point summary

The evidence reviewed in this section on subject leadership in secondary schools has suggested that:

- Subject leaders tend to be subject specialists;
- Departmental identity may be strengthened where there are spaces for staff to meet informally;
- Collaboration, participation and the ability to ask for help without judgement is important to allow staff to innovate within subject teams;
- Leadership skills are important to exercise as a team leader and in terms of managing cross school negotiations
- Personality, expertise, philosophy, vision and professionalism are important aspects of subject leadership;
- Subject leaders can exert influence on their teams by modelling good practice;
- There are often issues around role clarity which have been linked to effectiveness of practice;
- Different subjects received different levels of emphasis within schools;
- Subject leaders should foster a collaborative departmental culture.

Comparing primary and secondary phases

Some similarities can be drawn from the literature on subject leadership at primary and secondary levels. Common responsibilities found in the role of subject leader were: resourcing, documentation (e.g. policies), monitoring, and staff development. Common knowledge/competencies required by subject leaders included: subject knowledge, subject pedagogical knowledge, ability to create a vision for the subject/department incorporated in the school ethos and values, being supportive to staff, ability to model and share good practice, and promote collaboration. Potential challenges shared across the two phases were: difficulty identifying as a leader; relationships with the senior management team and the problems that come with leading from the middle; the status of different subjects; and external pressures. Differences appeared to be related to the nature of the phases, particularly with the fact that subject leaders in primary schools are subject generalists whereas in secondary schools they are subject experts, and so insecurities with subject knowledge are not likely to be an issue. In addition, subject leaders in secondary schools operate within a school department, which creates a different dynamic to the role. When considering subject leaders' ability to exercise influencing upwards, there are differences of culture between secondary and primary school settings. In this literature review, we found only one study on the topic which was specific to a secondary context. However, issues of strategic influence are important to consider within the primary setting too, although it is a setting that is more 'family' orientated in terms of more regular and close contact with parents and thus has a tendency to react to more localised immediate issues which perhaps detract from thinking more broadly. Moreover, the size and complexity of secondary settings can lead to isolation between departments, in ways that are unlikely to occur in a primary school. In addition, the interactions with and consciousness of other departments changes the climate within which a more strategic approach becomes essential in negotiating change and development. Still, it is

important to highlight that this comparison is only based on the studies identified within this literature review, which were scarce and dated, limiting our understanding of current practices.

Issues for consideration in relation to subject leadership

It is clear that the notion of leadership is complex for subject and middle leaders. Part of this complexity arises from the relationship between strategic leadership and departmental leadership that have emerged as important strands from the literature (Poultney, 2007). Although these two strands can be conceptualised as needing different skills and competencies, subject leaders need to understand the dialogic relationship between the two. That is, if subject leaders acknowledge their position in this relationship this will help them develop as reflexive practitioners who can mediate and negotiate the tensions inherent in the system.

Key point summary

The literature draws a distinction between two strands of leadership relevant to the subject leader:

- Strategic Leadership:
 - Understanding the whole school system and how the department contributes to the strategic aims of the school;
 - The role that influencing and being influenced by other staff plays for a subject leader to be effective;
 - The role of the subject in contributing to and working with wider school aims

- Subject Leadership:
 - Building a team – skills, knowledge and competencies associated with leading a team;
 - Up to date subject knowledge and specialised pedagogical approaches, especially in light of the shift towards a knowledge-based curriculum;
 - CPD – leading professional development through contributing specialised knowledge (knowledge mobilisation) to the wider school system / networks

Leadership in relation to middle leadership

The concept of what it means to be a middle leader is both contested (Forde, 2011) and complex (Hammersley-Fletcher and Strain, 2011). Middle leadership has been described as ‘highly porous’ (Davies, 2009: 45), with roles often found to be ambiguous (Koh et al. 2011; Odhiambo 2014; Fluckiger et al. 2015) and lacking in structure (Brundrett and Irvine, 2016). Many definitions of middle leadership exist within the literature, yet a definitive consensus surrounding what it means to be a middle leader is yet to be reached (De Nobile, 2017). Conceptualisations of middle leadership can be categorised across two dimensions: the layer of leadership being considered (e.g. secondary heads of departments form a layer between the senior leadership team and the teachers within their department) and the functions which middle leaders serve (e.g. monitoring attainment within their subject) (De Nobile, 2017). The word ‘middle’ suggests a mediating role between more senior leaders and less senior staff; however, in the movement towards more varied and distributed forms of leadership, it is not always clear who the ‘middle leaders’ are (Forde, 2011; De Nobile, 2017). De Nobile (2017), for example, points out that with the emergence of multi-academy trusts, many headteachers now find themselves as middle managers ‘sandwiched between’ trust executives and a layer of less senior leaders beneath them. The labelling of particular teachers as ‘middle leaders’ is also complicated by the fact that most teachers can be simultaneously followers as well as leaders (Briggs, Coleman and Morrison, 2012: 4).

Aside from the issue of which ‘layers’ teachers might reside in within their professional settings, we also need to consider the functions which they are expected to serve (De Nobile, 2017). The literature highlights the heterogeneity of the middle leader’s role, noting that roles and expectations vary widely depending on the teacher’s position, subject and context (Lieberman et al., 2000; Bolam, and Turner, 2003; De Nobile, 2017). These roles have also been shown to be dynamic, changing in response to the evolving political and economic landscape (Harris and Jones, 2017a). Perhaps the most significant shift in the middle leader’s role over the last two decades has been the movement away from mainly managerial duties (administration, organisation, etc) to a leadership role, with a focus on leading others towards a strategic vision for the school, department or particular area of focus (Bennett et al. 2007; De Nobile and Ridden 2014; Fleming 2014; De Nobile, 2017). In the section that follows, we review the varied expectations of middle leadership found within the literature, before exploring how middle leaders attempt to meet these expectations.

What is expected of middle leaders?

Leadership from the middle should focus on learning (De Nobile, 2017), with the overarching aim of leaders being to raise student attainment (Sun and Leithwood, 2017). Middle leadership is considered a key strategy in promoting high expectations for both teachers and pupils (Forde, 2011). Indeed, leadership has been hailed as ‘second only to classroom teaching as an influence on pupil learning’ (Leithwood et al., 2006). De Nobile (2017) has theorised that ‘student outcomes’ are one of three key outputs of middle leadership within the Middle Leadership in Schools (MLIS) model. The other two are ‘teaching quality’ and ‘teaching attitudes’. De Nobile notes that while there is evidence in support of a direct impact of middle leadership on student attainment (Dinham, 2007; Day et al., 2009), further research is needed using a combination of quantitative, qualitative and mixed methods (Youngs, 2011). A number of studies have demonstrated the positive effect of middle leadership on teaching quality (Harris, Busher and Wise, 2003; McKinsey and Company, 2007; Thorpe and Bennett-Powell, 2014). In McKinsey and Company’s study (2007) teacher quality was found to have the biggest

influence on pupil attainment. One of the key mediating factors appeared to be staff development, which in turn has been shown to improve classroom practice (Dinham, 2007). Middle leadership has also been shown to impact teacher attitudes such as job satisfaction and commitment (Day et al. 2009; Dinham, 2007; Wong, Wong, and Peng 2010), which in turn can influence teacher wellbeing (Collie et al., 2015).

While these three outputs appear as key themes throughout much of the middle leadership literature in one guise or another (see De Nobile, 2017), the expectations of middle leadership have also been framed in other ways. Many authors have foregrounded the importance of culture in middle leadership, putting forward suggestions for the type of culture that middle leaders should strive to promote. A prominent idea within the literature is the need for leaders to create a culture of learning, where learning is placed at the centre of all activities (Fitzgerald and Gunter, 2006; Davies and Davies, 2011). Many studies highlight the importance of professional learning communities (Stoll and Louis, 2007; Ronnerman et al., 2015), where teachers and leaders learn alongside one another within 'communities of practice' (Wenger, 2000; Hargreaves, 2003). Middle leaders who centred their role around the building of professional learning communities were found to be successful in improving standards of teaching and learning (Sammons, Thomas and Mortimore, 1997; Harris and Jones, 2010); further support for this approach comes from Fullan and Hargreaves (2012) who argue that groups of teachers have greater transformational power when building professional capital collectively. In schools adopting a professional learning community ethos, middle leaders play a central role in creating the organisational conditions and culture required for learning (Southworth, 2011). Their role is not seen as primarily transmissive (e.g. delivering training) but rather as a facilitator who provides opportunities for staff (including leaders) to co-construct meanings and understandings together (Lambert, 2009; Stephenson, 2010).

It has also been argued that middle leaders should be responsible for developing a culture of sharing good practice. Elmore (2008) describes this aspect of leadership as developing a sense of reciprocity where teachers are encouraged to share their strengths so that all teachers are able to achieve the highest levels of instruction within the school, a model which is now increasingly being used within networks of schools (Southworth, 2011). Related to the concept of reciprocity is Harris's (2013) idea of 'collegial norms', which need to be established by middle leaders to promote a climate for change based on collaboration and mutual learning.

The notion of leaders encouraging teachers to learn from each other sits within a much broader expectation that middle leaders will promote staff development. We have established already that development of teacher quality is a key priority for middle leaders (De Nobile, 2017); however, it is useful to explore the facets which tend to be included under the broad umbrella of 'teacher quality'. In other words, what kind of teacher are middle leaders expected to develop? The most prominent focus of staff development within the middle leadership literature involves supporting teachers to develop their classroom practice (Forde, 2011; Fleming, 2013; Leask and Terrell, 2014). It is noted that middle leaders have a responsibility to develop their own practice as well as the practice of others (Forde, 2011). Leading by example is cited frequently as an important behaviour for middle leaders. A content analysis of documents from Australian secondary schools specifying key roles and responsibilities demonstrated that middle leaders are expected to model 'exemplary classroom practice' (Brooks and Cavanagh 2009: 7). Similarly, there is empirical evidence that teachers closely observe what leaders do (Southworth, 2011: 75) and believe that leaders need to be 'good classroom teachers before they can lead' (Koh et al. 2011: 614). Middle leaders are also expected to engage in their own professional learning (Flood, 2011; Southworth, 2011) as well as encouraging teachers to

take risks and innovate within their classrooms (Forde, 2011; McIntyre and Hobson, 2016). This remit to drive innovative practice may, however, be at odds with the middle leader's role as a conduit for directives imposed by the senior leadership team or government policy (Forde, 2011; Hammersley-Fletcher, and Strain, 2011; De Nobile, 2017). Forde (2011) wondered about the extent to which innovative practice is possible within the current landscape where teachers might be considered to be 'technicians', whose principal responsibility is to implement government agendas rather than engage in transformative practice.

Outside of the classroom, middle leaders should play a part in developing other teachers' leadership skills. Again, the idea of leading by example is relevant, following the idea that leadership flows 'outwards' (Elmore, 2008). It has been argued that teachers should be developed as leaders from the onset of their teaching careers (Elmore, 2008; Woodhouse and Pedder, 2017) as a strategy for improving motivation and retention, especially in socially disadvantaged areas where the proportion of early career teachers is high, and there is a consequent shortage of school leaders (Rhodes and Brundrett, 2012). Elmore (2008) argues, based on several years working with leaders across a number of US elementary schools, that leadership is a 'human investment enterprise'; leadership requires 'more or less continuous investment in knowledge and skill, both because the knowledge base around instructional practice is constantly changing and because the population of actual and potential leaders is constantly depleting and replenishing itself'. In order to achieve continuous school improvement there is a need for continuous investment in 'the capacity of people at all levels to master and lead the improvement of instructional practice'.

Elmore (2008) offers five suggestions as to how leadership in new staff should be nurtured:

- 1) All new teachers should have leadership practices modelled to them, as well as instructional practice. Skills and practices to be modelled might include: 'observation, analysis, problem-solving and work with peers' (p.59)
- 2) Intermediate teachers should be given leadership opportunities, under the supervision of a more experienced leader
- 3) Teachers should be involved, alongside administrative staff, in organisational and managerial tasks such as organising times for teachers to work on projects collaboratively
- 4) More experienced teacher leaders would form a 'potential cohort of principals' (ibid) who would be given opportunities to lead in other schools under the supervision of the other school's principal
- 5) Teacher leaders and administrative staff demonstrating strong managerial skills would be given the opportunity to pursue roles as system-level administrators

Woodhouse and Pedder (2017) conducted a three-year longitudinal study of early career teachers in English secondary schools motivated by concerns that many talented potential teacher leaders choose not to pursue careers as head teachers (Smith, 2011). The authors found an association between early leadership opportunities for novice teachers and job satisfaction (Woodhouse and Pedder, 2017). The role of middle and senior leaders in nurturing future leaders was emphasised, with teachers reporting that 'the perfect balance of autonomy and support' led to high levels of personal agency and efficacy. Modelling of successful leadership practice was also found to shape teachers' leadership aspirations for the future. Staff development, in relation to the development of leadership potential, as well as classroom practice, is therefore central to the middle leader's role.

Two further (and related) roles contained within the remit of the middle leader are involvement in consultation with staff (Hammersley-Fletcher and Strain, 2011) and strategic development (Davies and Davies, 2011; De Nobile, 2017). Forde (2011) notes that for effective school improvement to take place, teachers need to be involved directly in decisions; increasingly, the consultation process is enacted through middle leaders (Hammersley-Fletcher and Strain, 2011), who are often tasked with representing the interests of their team/department when whole school decisions are made (Bolam and Turner, 2003). As well as consulting with their colleagues about decisions being made at a whole school level, middle leaders are also expected to develop a strategic vision for their subject, department or area of responsibility (Irvine and Brundrett, 2017; De Nobile, 2017). The need for strategic thinking may be especially important in the current 'turbulent' climate, which is wrought with change (Harris and Jones, 2017a). Davies and Davies (2011) suggest that leaders regularly take stock by posing the questions: What are we doing? Why are we doing it? What comes next? Interestingly, not all researchers agree that strategic vision should be the remit of all middle leaders; Southworth (2011) argues that leadership for learning, but not strategic leadership should be widely distributed.

The final aspect of the middle leader's role to be explored was, rather tellingly, cited less frequently than many of the other roles discussed above. Crowther et al. (2009) argued that teacher leadership should have a core moral purpose of education, with the ultimate aim of improving lives. Bezzina (2012) argued that the moral purpose of schools has become lost in education, despite being 'fundamental to the success of schools and the work of their leaders'. More recently, Harris and Jones (2017a: 1) argued for a 'personal and moral perspective' focusing on the 'fundamental right' to 'equity, diversity and inclusivity'.

It is clear from the preceding discussion that we expect a lot from our leaders; in fact, it has been argued that there is a tendency to have unrealistic expectations about what leaders can achieve (Hammersley-Fletcher and Strain, 2011). Middle leaders are expected to raise student attainment, improve teacher quality and promote positive attitudes amongst staff. They are also expected to cultivate a collegial culture of professional learning, facilitate staff development and be involved in consultation with staff and strategic development. Lastly, and perhaps most importantly, they are expected to hold on to their core moral purpose, to use their role to improve lives within their community. We will now go on to look at how middle leaders attempt to meet these expectations and the capabilities and knowledge that they need to be successful.

Knowledge and capabilities necessary

Leadership requires different skills to teaching, resulting in a potential 'capability gap' (Irvine and Brundrett, 2017). When considering the knowledge and skills that middle leaders need to be successful, the MLiS model (De Nobile, 2017) provides a useful starting point. De Nobile categorised the behaviours which middle leaders enact, in order to meet the many expectations of their role under five headings: leading teams; managing relationships; managing time; communicating effectively; and managing self. While there are commonalities between the tasks which Hammersley-Fletcher (2002) identified as being undertaken by subject leaders (resources, documentation, influencing practice, monitoring, staff-training, professional development and liaison) and De Nobile's middle leader behaviours (2017), there appears to be an increased emphasis on the interpersonal aspects of the role, which reflects the shift noted by Southworth (2011: 81) over the previous decade from 'managing things (materials, budgets) to leading people'. We will use these headings as an initial framework for

exploring ideas from the wider literature about the capabilities required by middle leaders, followed by discussion of any additional factors that do not sit neatly within these headings.

The centrality of relationships is widely emphasised across the middle leadership literature (Southworth, 2011; Ng and Chan, 2014; Gregory, 2017). Gregory (2017) notes that, 'schools have changed and are requiring more interdependence among all of the educators in their buildings' (p.143). He goes on to highlight the need for "positive, trusting relationships that feed a productive school culture" (p.143). The middle leader's role included liaison between different groups of staff, collaboration with other teachers (De Nobile, 2017) and individual discussions with teachers about their practice (Bolam and Turner, 2003), all of which require trust (Davies and Davies, 2011; Duignan, 2012) and sensitivity (Denis, Langley, and Rouleau 2010; Duignan 2012; Grootenboer, Edwards-Groves, and Ronnerman 2015; Irvine and Brundrett 2016). Leadership practices have been shown to have maximum impact when conducted through 'trusting and collaborative relationships' (Harris, 2013), which in turn have a positive impact on the culture within the school (Gregory, 2017; Davies and Davies, 2011). The quality of the relationships within schools has been identified as a key predictor of how well externally imposed changes are implemented in school (Tschannen-Moran, 2014; Tschannen-Moran and Gareis, 2015). As well as building trust amongst colleagues, middle leaders may also need to deal with internal politics (De Nobile, 2017), e.g. in the presence of 'heroic' leaders (Danielson, 2007) and it is recommended that they invest time in getting to know their staff (Irvine and Brundrett, 2016). Middle leaders will also need to draw on highly developed interpersonal skills in order to provide emotional support for staff (Stead, 2006; Southworth, 2011). This may be especially relevant when mentoring NQTs (Southworth, 2011), and Stead (2006) argues that a balance must be struck between providing support, while ensuring that staff do not become overly dependent.

Leading teams is frequently a big part of being a middle leader, e.g. leading other members within a subject area or key stage. Given that all teachers are not necessarily endowed with natural team building abilities, it is important for teachers to have opportunities to develop them in preparation for leadership (Thorpe and Bennett-Powell, 2014). Another important aspect of leading teams is the need for enthusiasm and drive (Dinham, 2007). Hammersley-Fletcher and Strain (2011) discuss the importance of leading by example and enthusiasm, rather than by imposing mandates onto staff. Fielding (2007), however, warns of 'misdirected enthusiasm' and emphasises the need to ensure that all initiatives have been sufficiently considered. A final point about leading teams is that the middle leader needs to be committed to the role and be prepared to 'step out' of the classroom (Forde, 2011).

Middle leaders need to be effective communicators so that they can share their 'ideas, experiences and practice' (Forde, 2011:162) successfully with colleagues and provide carefully considered feedback which clearly identifies areas of development for staff within their teams (Southworth, 2011). Middle leaders also need to ensure that communication is reciprocal, providing opportunities for staff to voice their concerns and making sure that communication works upwards as well as horizontally (Stephenson, 2010). It is important for communication to be open and honest to engender trust (Duignan, 2012; Edwards-Groves, Grootenboer, and Ronnerman 2016; Hoy and Miskel 2012). While there is a general consensus that communication skills are essential for the middle leader role, De Nobile (2017) notes that further research is needed in this area.

Time management is a recurring theme throughout the literature (De Nobile, 2017). While teachers in non-leadership roles are already accustomed to the 'balancing act' involved with managing the high workload associated with the profession, the addition of leadership responsibilities can lead to

'pressure, frustration, stress and worse' (De Nobile, 2017: 13). Middle leaders report that their teaching load is barely reduced following adoption of a leadership role, causing significant issues in terms of fitting new responsibilities into an already packed timetable. Davies and Davies (2011) point out that leaders are not just responsible for their own time management: they also need to address the time constraints for other staff when they are asked to engage in development activities. Time is acknowledged as a frequent barrier to staff development (Fitzgerald and Gunter, 2006; Rhodes, 2012; Hatcher, 2012); middle leaders therefore need to allocate sufficient time for staff to discuss and share ideas (Davies and Davies, 2011). Where coaching or other directive techniques are used, it is essential that learner time is used effectively (Rhodes, 2012).

The final heading presented by De Nobile is 'managing self'. This strand refers to the capabilities required by middle leaders to cope with the 'pressures, emotions and demands' of the role (De Nobile, 2017: 14). At a professional level, it is important for leaders to feel that they are up to date in terms of their subject/pedagogical expertise (Heng and Marsh, 2009; Gurr and Drysdale, 2013) as well as their leadership skills (Lai and Pratt, 2004; Muijs and Harris, 2006; Bush, 2016). Up to date expertise in both areas is needed to support both confidence and credibility (Southworth, 2011). It is therefore important for leaders to continually engage in professional development across both areas. At a personal level, leaders need to be equipped to deal with the 'emotional labour' involved with the role (Grandey and Gabriel, 2015). It has been argued that emotional intelligence is of particular relevance to the middle leader (Wong, Wong and Peng, 2010): if leaders have a greater awareness of how others might be feeling and the possible reasons behind their actions, they might be better equipped to support their team effectively (ibid). As well as being aware of others, it is also important for leaders to demonstrate high levels of self-awareness through continued self-reflection (Irvine and Brundrett, 2016). As noted by one of the leaders in Irvine and Brundrett's study, '. . . you must be able to reflect, or think about what you do, if you are going to get the most out of yourself' (2016: 90). Confidence has also been identified as being a key attribute for successful leaders (Southworth, 2011; Harris and Jones, 2017b), alongside flexibility and a willingness to learn from the leadership process (TDA, 2005). Other factors which have been highlighted as being important for managing the self are developing and maintaining a sense of agency (Woodhouse and Pedder, 2017), sustaining commitment to improving learning (Cranston, 2013; Day et al, 2009) and holding on to your reasons for doing the job (Bezzina, 2012). Finally, leaders need to protect themselves from becoming overcommitted, e.g. by being invited to 'to serve on every committee because they will do a great job, until they are spent' (Gregory, 2017: 155).

We now turn to other capabilities and knowledge identified within the literature as being important for middle leaders which do not map readily onto De Nobile's (2017) five headings: leading teams; managing relationships; managing time; communicating effectively; and managing self. While we have already mentioned the need for middle leaders acquiring up to date expertise in leadership as part of 'managing self', we have not yet considered what this expertise might look like. Although the other four headings discussed above are all crucial competencies for effective leaders, there is a body of knowledge surrounding leadership practice which is arguably also needed alongside these competencies. For example, when considering middle leaders' remit for staff development, it follows that leaders need to be skilled in moving other teachers' practice forward (Southworth, 2011); however, if we are to equip leaders with the skills that they need to do this effectively, we need to equip them with knowledge about how this is best achieved. Aside from the general messages about the need for building trusting relationships, leaders also need to understand what the content and structure of their development work with teachers should be like. Coaching and mentoring, which has become very popular in schools in recent years, provides one such model. According to coaching

principles, it is important for leaders to achieve an appropriate balance between directive support and opportunities for the learner to reflect and take ownership of their development (TDA, 2005). It is also important that coaching and mentoring practices allow space for experimentation alongside the generation of appropriate goals (ibid). This very specific expertise may be important in addressing the challenge of pinning down what effective leadership looks like:

‘The real challenge in connecting leadership to learning is not in saying what it is, rather, it is in describing how successful school leaders do this’ (Southworth, 2011: 73).

While the terms 'coaching' and 'mentoring' are often conflated, it is important to draw a distinction between the two. It has been argued that coaching and mentoring have different purposes and that their use is dependent on context (CUREE, 2010). Oti (2012: 356) described the difference between the two terms as follows:

‘Mentoring can involve a closer and more meaningful relationship with an individual, be formal or informal in nature and cover a substantial period of time. Coaching on the other hand may be viewed as being more impartial with greater critical assessment. It may be more short term, be task specific and involve either one individual or a group of people.’

It is noted that while coaching is often a very practical activity, involving the setting of tangible (often performance-related) targets (Oti, 2012), mentoring tends to have a strong focus on reflection (Roffey-Barentsen and Malthouse, 2009). The National Framework for Coaching and Mentoring provided suggestions for when different coaching or mentoring approaches might be applied, depending on the situation (CUREE, 2010). The framework describes three forms of mentoring and identifies the key purpose of each:

- Mentoring for induction – to support teachers new to the school;
- Mentoring for progression – to support teachers when moving into a new role;
- Mentoring for challenge - to support teachers in addressing significant barriers to progress

Two types of coaching are identified:

- Specialist coaching to review, develop and innovate teaching practice and to support development of a 'culture of openness' within school;
- Collaborative co-coaching to support 'voluntary, structured partnerships' among staff, again, fostering a culture of mutual support and critique (ibid: 3)

While coaching and mentoring, may take many forms, applied across diverse educational contexts, Law (2013: 28) argued that,

‘the essence of learning, be it in teaching, training, coaching or a mentoring context, seems to be universal. To learn, one must embrace a new set of values, attitudes, skills or knowledge that one did not have before’.

The key emphasis within the coaching and mentoring literature is not on the specific needs of mentees within particular contexts, but rather on the need for leaders to support learners in understanding their context and overcoming any challenges inherent within it, through a problem-solving approach (CUREE, 2010; Southworth, 2011; Law, 2013). There is currently a dearth of literature on the way in which coaching and mentoring practices might differ across diverse educational contexts.

Another important aspect of leadership expertise in relationship to staff development is an understanding of the different types of knowledge which middle leaders might want their teams to acquire. While Whelan (2009) notes that teachers need to acquire tacit 'craft' knowledge from more experienced teachers in order to develop their practice, Southworth (2011) emphasises middle leaders' role in making tacit knowledge explicit, so that it can be shared across the team. He argues that dialogue is key to the process, given that articulation of our ideas helps us to reformulate and analyse them (ibid). Southworth (2011: 78) therefore recommends that leaders provide regular opportunities for staff to meet and discuss their practice with the aim of co-constructing 'practical, actionable knowledge'.

It has also been argued that middle leaders should engage in interrogation of the academic literature (Cordingley, 2016, cited in Harris and Jones, 2017b) to support them in making decisions about which teaching approaches are sufficiently evidence-based. Harris and Jones (2017b) argue that critical engagement with academic research will reduce the risk of weak ideas being rolled out within schools. The drive towards evidence-based practice is represented in two recent white papers (Carter, 2015; Department of Education, 2016); however, concerns have been raised surrounding the question of whether teachers have the required research literacy (and the will) to engage with research in a meaningful way (Cain, 2016). Given that middle leaders are likely to play a key role in providing opportunities for evidence-based professional development, in response to the push for research informed approaches, it is especially important for them to develop the research literacy skills to use the academic literature effectively to support school improvement.

As well as engaging with the research of others, it has been suggested that middle leaders should also encourage teachers to engage in their own research projects (Cordingley, 2015; Hammersley-Fletcher, et al., 2017; Harris and Jones, 2017b). A recent study by Hammersley-Fletcher and colleagues provided an account of how a group of primary teachers transformed their practice through engagement with research within their classrooms. Engagement with research activity, led by the teachers, was found to 'make a dramatic difference to practice and identities' (Hammersley-Fletcher et al., 2017: 13), with staff reporting a 'new sense of energy and purpose', and a 'sense of adventure and excitement' felt across the alliance (12). The findings of this study reflect Davies and Brighouse's vision (2008) for passionate leadership (Davies & Brighouse, 2008) and demonstrate a way to achieve genuine engagement that goes "beyond invitation" (Simkins, Maxwell, & Aspinwall, 2009: 433). Middle leaders might consider promoting and engaging in research enquiry as an engaging and participatory vehicle for staff development.

As well as developing a strong understanding of how to move teachers forward in the practice, middle leaders also need to have an awareness of how their behaviour might influence staff morale. Bolam and Turner (2003) describe examples of leadership practice enacted by head of departments which were perceived as damaging to staff morale: the head of department taking all of the higher ability groups, new teachers being given the most challenging classes with the most challenging behaviour, and demonstrating a lack of sympathy towards new teachers. Whilst these findings come from a relatively old piece of research, they remain relevant today. As Southworth (2011: 75) highlights, leaders 'work with and "through" others' and "rely on colleagues to put into practice agreed ways of working". It is therefore in the best interests of middle leaders to develop an awareness of how their behaviours and decisions are likely to be received by their teams. Southworth (2011) emphasises the importance of such indirect effects, arguing that leaders should 'work directly on their indirect influence' (ibid). He goes on to highlight the importance of leading by example, advocating that leaders 'use their visibility to their advantage.' (ibid).

It is also important for leaders to adopt a flexible approach to their role. Stephenson (2010) identified the need for middle leaders to view professional learning as context-specific, time consuming, messy and fluid. Similarly, Thorpe and Bennett-Powell (2014) concluded that there was no one superior set of leadership practices and recommended that leaders adopt a problem-solving approach to their role, selecting the best tools for their job. The authors also suggest problem-based training as a way to prepare them for their role (ibid). Other authors have also highlighted the need for middle leaders to adapt their practices in light of the context (Grint, 2003; Harris and Jones 2017a), especially in the current time of great change. Harris and Jones argue that in times of flux it is important for middle leaders to adopt a reflective approach where they regularly take stock: 'reaffirming vision and values, re-confirming important goals and re-establishing what or who matters most' (ibid: 1)

A final capability of middle leaders, which has yet to be explored, is that of experience. Irvine and Brundrett (2016) define perspective, as developed through experience and self-reflection, as being one of the key competencies required by middle leaders. The authors note that when middle leaders act intuitively (and therefore rapidly) they are drawing upon prior or 'referred' experience (Irvine and Brundrett, 2016: 90). This experience can involve previous incidents occurring within the leader's professional role, but may also be drawn from other areas of the leader's life (e.g. an experience of managing conflict outside of work). It is the latter case which relates to the term 'referred' given that the experience is referred from elsewhere. In the absence of prior or referred experience, the leader is unable to act intuitively and is therefore forced to act analytically, generating a slower response (ibid). Davies and Davies (2011) also recognise the importance of experience, focusing on teacher rather than leader development. Davies and Davies (2011) suggest that effective staff development should be experiential, with leaders providing opportunities for their team to learn through taking risks and engaging in problem-based learning. The importance of contextualised learning is highlighted, with a suggestion that staff development activities should be linked to "real-life school challenges" (Davies and Davies, 2011: 113)

Key point summary

The evidence reviewed in this section has suggested that the following expectations are placed on middle leaders:

- Middle leaders are expected to play a key role in school improvement;
- Middle leaders should engage in high quality professional development to continually augment their expertise;
- Middle leaders should help build communities of practice where teachers learn together;
- Middle leaders should remain closely connected to a sense of moral purpose;
- Middle leaders should drive innovation, while also responding to external imperatives
- Middle leaders should lead by example;
- Middle leaders should support the development of others, perhaps thorough the use of mentoring and coaching techniques;
- Middle leaders are expected to mediate between senior leaders and teachers;
- Middle leaders are expected to have a positive impact on classroom practice;
- Middle leaders need to provide early leadership opportunities for other teachers;
- Middle leaders need to find spaces to exert agency, despite the many constraints placed on them;
- Middle leaders need to be research literate, engaging with recent research, engaging in and encouraging others to engage in practitioner research;

- Effective middle leadership requires careful time management.

We have explored the many expectations placed on the middle leader and the competencies required for middle leaders to meet these expectations. Middle leadership involves leading teams to create a sense of cohesion and shared vision, managing relationships built on trust and mutual respect, managing time effectively in the face of multiple competing roles, communicating well to allow sharing of good practice and constructive sensitive feedback and managing self in terms of expertise, motivation and emotional intelligence. Middle leaders also need to be research literate, engaged in teacher inquiry and able to gain and draw upon diverse professional experiences. Within this section we have drawn upon mainly academic literature; however, it is noted that some authors are practising teachers (Irvine in Irvine and Brundrett, 2016; McManus in Hammersley-Fletcher et al., 2017) ensuring teachers' voices are represented. We will now discuss the tensions and challenges encountered by middle leaders, before exploring ways in which middle leaders might be prepared for and supported in their role.

What tensions and challenges do middle leaders face?

There are a number of aspects of the middle leader role which make it potentially challenging, many of which lie out of the leader's control (Irvine and Brundrett, 2016). As noted earlier, the middle leader's role suffers from a lack of definition which presents problems for leaders, especially in the early stages of leadership (Davies, 2009). As noted by a new middle leader, within Irvine and Brundrett's study, '...the whole nature of the job is vague and amorphous' (Irvine and Brundrett, 2016: 89). Leaders can also find it difficult to implement certain changes, due to a perceived need to maintain the status quo in school as reflected by comments by leaders such as '... this is how we've always done it' (Irvine and Brundrett, 2016: 89). As noted for subject leaders, other middle leaders can also experience the feeling of being 'sandwiched between' (Marshall, 2012), feeling pressure from both the lower and upper layers (Fullan, 2010).

An additional layer of pressure comes from the increased visibility of schools in relation to accountability. Not only are schools accountable to the government in relation to raising standards, they are also increasingly subject to the scrutiny of parents (Hammersley-Fletcher and Strain, 2011; Forde, 2011), and in the case of multi-academy trusts they are also accountable to commercial stakeholders. This increased visibility can constrain the extent to which leaders feel able to take risks with their practices, for fear of a negative impact on pupil outcomes and subsequent damage to the school's reputation (Forde, 2011).

There are also a number of more pragmatic challenges faced by middle leaders. A common theme within the literature is a lack of time. Middle leaders often report struggling to balance their time between competing responsibilities (Bolam and Turner, 2003; Rhodes, 2012; Irvine and Brundrett, 2016), bemoaning the fact that their teaching loads remain similar to their pre-leader positions (De Nobile, 2017) and that they are forced to carry out leadership activities within time-pressured periods (Brundrett, 2003). Leaders also talk about the lack of time available for specific aspects of the role, for example, time for reflection (Davies, 2009) and time for coaching individual teachers (Rhodes, 2012). Other pragmatic issues include difficulties obtaining cover to allow observation of other teachers (Hammersley and Strain, 2011) and insufficient budgets to purchase resources (Forde, 2011).

For many middle leaders the aspect of the role which they find most problematic is managing others (Schon, 1991; Busher et al., 2000). As mentioned, in relation to subject leaders specifically, middle leaders tend to feel uncomfortable about monitoring other staff, preferring to focus on childrens' work instead (Hammersley-Fletcher and Strain, 2011). Similarly, middle leaders often object to the label of 'leader' and are reluctant to be seen as the person driving the changes. Middle leaders prefer instead to work collaboratively with staff rather than lead them explicitly (ibid). While collaboration tends to be the most comfortable mode of working for middle leaders, it is not without its challenges. De Nobile (2017) notes that while some staff welcome collaboration, others may be resistant to this way of working, likely because of prior experiences which make it difficult for the leader to establish a culture of trust and openness. Poor interpersonal skills can also limit the ease with which staff can work together effectively (ibid). A tendency to over-direct, providing insufficient space for staff to reflect on their own ideas and practice has also been highlighted as a potential barrier to effective leadership: Sundli (2007) points out that mentoring can act as a barrier to self-reflection if the mentee is found to 'blindly follow' (Rhodes, 2012: 252) the mentor without reflecting on why a particular practice might be appropriate. The potential for "competing agendas" between the leader and the mentee is also noted (Rhodes, ibid). A final tension relating to leading other staff is the potential for resentment to emerge where leaders are framed as 'heroic' (Danielson 2007; Bush and Glover, 2014) – sometimes referred to as 'tall poppy syndrome'. This term, coined by Feather (1994) relates to the scrutiny experienced by high achievers from others who might be waiting for them to be 'cut back down to size'.

A major tension surrounding the area of middle leadership relates to the issue of agency. While on the surface, the middle leader's key purpose is to drive significant change (Hammersley-Fletcher and Stain, 2011), questions have been raised about the extent to which such significant change is possible. While teachers might appear to have more power than ever, given the shift towards more distributed modes of leadership, there are still "disparities of power" (Gregory, 2017: 141) and it has been argued that middle leaders' agency remains constrained by external forces (Hatcher, 2012). While middle leaders are often consulted about decisions to be made at the school level, the headteacher remains in control of any final decision-making (Hammersley-Fletcher and Strain, 2011; Hatcher, 2012). The headteacher is also in control of the status of a particular leadership role (e.g. favouring core over foundation subjects) and the focus of development priorities throughout the school (Hammersley-Fletcher and Strain, 2011).

In summary, middle leaders face a number of challenges and barriers to success, some pragmatic and others more substantive. Middle leaders report feeling unsure about the boundaries of their role, torn between the demands and needs of the staff below and beneath them. The challenge of leading others requires a delicate balance between direction and collaboration, as well as balancing many competing demands on their time. Middle leaders are also vulnerable to the growing pressures associated with increased visibility and accountability, alongside a sense of limited agency.

Key point summary

The evidence reviewed in this section suggests that middle leaders face the following challenges:

- A lack of clarity in terms of roles and responsibilities;
- tension when trying to meet the sometimes competing needs of staff in the 'layers' below and above them;
- the need to strike a balance between direction and collaboration when supporting others;
- multiple demands on their time

- growing pressure associated with increased visibility and accountability to a range of stakeholders;
- a limited sense of agency in the face of externally imposed constraints.

Developmental needs of middle leaders

As discussed in the preceding sections, middle leaders (including subject leaders) are expected to fulfil a number of diverse and challenging roles, requiring a wealth of knowledge and competencies. Given that the vast number of teachers have been predominantly trained to teach rather than lead, this presents a potential 'capability gap' (Irvine and Brundrett, 2016: 88). It is also important that we consider the specific needs of middle/subject leaders as distinct from other levels of leadership (e.g. senior leaders) given that the different roles yield different development requirements (Leskiw and Singh, 2007). Within this section, we will consider the support that subject and middle leaders need in order to overcome this gap. We will begin by exploring potential mechanisms for addressing each of these needs. Then, we will explore the influence of different positions and contexts on the likely needs of leaders, e.g. the needs of subject versus middle leaders; and the impact of the phase or size of the school.

How might the needs of subject and middle leaders be addressed?

The need for subject-specific expertise in relation to curriculum, pedagogy and assessment practices is a key theme across the middle leadership literature (Heng and Marsh 2009; Abdul Razzak 2015; Dinham 2016), relevant to both subject and curriculum leaders. In order to address this, 'leaders need ready access to the latest thinking and key insights into effective classroom practices and pedagogy' (Southworth, 2011: 82). However, De Nobile (2017) notes that further research is needed to explore how this knowledge is used effectively to improve student outcomes.

As mentioned previously, one way for leaders to achieve the required levels of subject expertise is to engage in academic study (Shank and Brown, 2013; Waring and Evans, 2015). This might be associated with national courses (Rhodes et al., 2009), Master's courses or reflective reading groups (Davies and Davies, 2011). It might also involve leaders engaging in their own research and facilitating research projects amongst other staff (Hammersley-Fletcher et al., 2017; Evans et al., 2017). Engagement in one's own research and digestion of others' academic work requires leaders to be research literate (Department for Education, 2016; Evans et al., 2017). In the context of teaching, research literacy 'involves the ability to judiciously use, apply and develop research as an integral part of one's teaching' (Evans et al., 2017: 404), and allows leaders to make informed critical choices about the pedagogies which they use and share within their teams. Given that research tends to make up only a small part of leaders' initial teacher education, where there is sometimes a lack of focus on the core skills needed to be a teacher researcher (Carter, 2015), it is therefore important for leadership development programmes to support leaders in this area. Evans et al. (2017) highlight three key areas for consideration when attempting to develop Early Career Teachers' (ECTs) research literacy: "locating research within teachers' everyday practice and exploring with ECTs what knowledge is valued; supporting ECT agency through research literacy; and ensuring the sustainability of research" (: 416).

In line with the idea of leaders adopting evidence-based approaches when developing their expertise rather than accepting 'received opinion' (Waring and Evans 2015: 18), many authors have suggested that middle leaders need to innovate and take risks (Fitzgerald and Gunter, 2006; Muiji and Harris, 2006; McIntyre and Hobson, 2016). Fitzgerald and Gunter's (2006) comparative study across 82 teachers working in England and New Zealand found that teachers commonly reported risk-taking as a key leadership behaviour, which should be adopted within the classroom, but also when leading

others. Muijis and Harris (2006) noted the importance of collaboration when leading innovation, with teachers reporting a 'collective creativity' that arises from sharing knowledge and engaging in group problem-solving. Similarly, McIntyre and Hobson's (2016) study exploring the impact of external mentors on the identity of novice science teachers found that the provision of a discursive 'third space', where teachers could explore ideas with a mentor outside of the school, supported teachers in taking risks. While the question of how we might prepare middle leaders to drive innovation in school is not directly addressed within the literature, the findings outlined above suggest that leadership development should highlight the benefits of innovation and make leaders aware of the potential for collaboration and the provision of a 'third space' to promote risk taking. The literature suggests that leaders can also facilitate innovation by cultivating a culture where mistakes are accepted as part of the learning process (Muijis and Harris, 2006; McIntyre and Hobson, 2016).

Building on the theme of developing professional learning communities by sharing good practice, middle leaders and subject leaders need to become involved and lead professional development activities within their departments and across school networks. This may involve enhancing their understanding of system leadership in order to effectively lead professional development networks (Boylan, 2008). Additionally, it could involve establishing communities of practice around specific subject areas in order to develop effective teaching and learning strategies (Bennett, 2006).

As well as needing to develop exemplary knowledge and practice within their field, a middle leader needs to also be able to share this knowledge with their team effectively (De Nobile, 2017). In addition, good communication skills are required to convey constructive feedback with sensitivity (Denis, Langley, and Rouleau 2010; Duignan 2012; Grootenboer, Edwards-Groves, and Ronnerman 2015; Irvine and Brundrett 2016). According to Coleman and Glover (2010) effective communication is often taken for granted by leaders, despite being complex and sometimes difficult to achieve. While many authors note the importance of communication in middle leadership, there is very little research about leaders' communication practices (De Nobile, 2017). There is also a dearth of guidance about how leaders might become more effective communicators. The few studies found within this area emphasise the need for communication to be open and honest (Davies and Davies, 2011), and emphasise the gains from middle leaders when generating intersubjective communicative spaces to develop teachers' practice (Ronnerman et al., 2015).

Related to the need for effective communication is the need to establish positive relationships with staff (De Nobile, 2017; Gregory, 2017). Gregory (2011) emphasises the importance of positive, trusting relationships and suggests that, 'Educational leaders at all levels would benefit from understanding how these relationships operate and how to transform the more negative relationships into positive ones' (Gregory, 2017: 143). Gregory (2011) also puts forward some practical suggestions for how middle leaders might go about engendering trust amongst their colleagues: be explicit about expectations (writing them down where appropriate); minimise insecurity by praising staff and celebrating success; avoid gossip; and boost confidence of less secure colleagues through mentoring and the provision of supportive development opportunities. Forde (2011) argues that strong expertise is also an important aspect of building trust as it enhances middle leaders' credibility. Thus, leadership development programmes should foreground the importance of leaders being credible, trustworthy and taking the time to get to know their colleagues.

Although 'managing relationships' is separate from 'managing self' within De Nobile's model (2017), arguably, some aspects of managing self are required for leaders to establish positive relationships and also for effective communication to take place. In particular, emotional intelligence is likely to be relevant to both these areas, with leaders high in emotional intelligence being more empathic and understanding of others' behaviours (Held and McKimm, 2012). Self-awareness – another facet of

emotional intelligence – is also an enabling factor for middle leaders (Irvine and Brundrett, 2016). Leader development programmes might therefore include training designed to improve leaders' emotional intelligence, although, it should be noted that there is currently little research into whether it is possible to increase emotional intelligence.

Motivation is another aspect of managing self which has been identified as being important for middle leaders (Davies and Davies, 2011). One way to boost leaders' motivation levels is to provide a culture of support and collaboration within the school (Davies and Davies, 2011). This has important implications for the senior leadership team, as well as all other staff who each make their own contribution to the atmosphere within school; as noted by Jarzabkowski (2002), 'school leaders do not have the sole ability or responsibility to effect changes in organisational culture' (: 3). One strategy to support leaders in remaining motivated is to remind them of why they went into the profession (Cranston, 2013). Bezzina (2012) argues that a sense of moral purpose is an important factor in effective middle leadership. This reflects findings within the teacher resilience literature that teachers who thrive in the profession are often driven by a strong sense of intrinsic motivation, often related to wanting to make a difference in some way (Sinclair, 2008). Positive relationships with colleagues (as discussed above) can also help sustain motivation (Gu and Day, 2013). Leadership development support might therefore include opportunities for leaders to reflect regularly on their reasons for being a teacher and on the potential of their leadership role to support them in achieving their initial aims (e.g. to develop aspiration among young people in deprived areas), while also highlighting the many benefits to investing time in relationships with colleagues.

On a more pragmatic note, leaders also need to be supported in developing their time management skills to allow them to cope with the many competing roles and responsibilities inherent in being a teacher as well as a leader (Thorpe and Bennett-Powell, 2014). As well as managing their own time effectively, middle leaders also need to address the time constraints of others within their team (Rhodes, 2012; Harris and Jones, 2017b). While the need for leaders to develop excellent time management skills is frequently cited (e.g. Rhodes, 2012; Thorpe and Bennett-Powell, 2014; De Nobile, 2017), there is little discussion about what effective time management looks like in practice and how we might support leaders to develop this. Haneberg (2005) suggested that teachers should use small pockets of time between other tasks to complete leadership activities, but De Nobile (2017) notes that there is no evidence to indicate the effectiveness of this strategy. One practical strategy proposed by Bubb and Earley (2004) is the use of time auditing, which encourages teachers to monitor their current use of time and the effectiveness of specific tasks in improving student outcomes. More recently, Holmes (2017) also notes that effective monitoring of teachers' non-directed activities might reduce teacher stress and improve retention; however, the key focus of this study was on exploring teachers' motivations for working outside of contracted hours, rather than looking at strategies for managing that time. In Queen and Queen's wellness plan for teachers (2013), three 'major time bandits' are identified – perfectionism, procrastination, and the inability to say no – alongside strategies to overcome them. For example, teachers are encouraged to check their perception of a task against the perception of others' (to overcome perfectionism); it is suggested that tasks should be broken into manageable chunks (to overcome procrastination); and teachers are provided with assertiveness strategies to use when finding it difficult to say no. While these strategies (and others described in the book) seem intuitively helpful for middle leaders as well as teachers in this area, research is needed to evaluate their effectiveness, before potentially including them within leadership development programmes.

So far, we have discussed how we might support middle leaders in developing four aspects of De Nobile's model of how middle leaders fulfil their responsibilities: managing self (including developing

expertise); communicating effectively; managing relationships and managing time. We will now consider how we might support middle leaders with the final aspect of leading teams. The key development needs relating to leading teams are vision sharing, motivating others (Southworth 2008; Duignan 2012; Dinham 2016) and teambuilding (Sanders, 2006; Thorpe and Bennett-Powell, 2014). As with many of the other development needs described earlier, while the literature is clear about the need for leadership development programmes to support these competencies, there is little guidance in terms of what this support might look like. Harris (2013) does however make some general suggestions for what might be included in the '[r]ich and diverse continuous professional development ... required for teacher leadership to flourish' (: 43): leading groups and workshops, facilitating collaborative work, mentoring, teaching adults, action research, collaborating with others, and writing bids. Harris (2013) suggests that development of these skills might best be achieved through networking or structured programs that allow leaders to collaborate with middle leaders from other schools.

In the above discussion, we have focussed on how we might address some of the key development needs of middle leaders. We will now explore a couple of more general points that need to be considered in relation to how leadership development might take place. One key insight that emerges from the literature is the importance of experience. While structured leadership programmes have traditionally played a central role in leadership development, it has been noted that their effectiveness can be limited in cases where insufficient links with leaders' school experiences are made (Cordingley, 2016, cited in and Jones, 2017b). This finding resonates with the proposition that 'leadership can probably only really be learned through the cut-and-thrust experience of success and failure in real-life scenarios' (Irvine and Brundrett, 2017: 5). As well as ensuring that taught programmes connect with experience, it is also important for aspiring middle leaders to actively seek out leadership experience early on, and for senior leaders to facilitate this (Irvine and Brundrett, 2017). It is important to note that experience alone is unlikely to generate effective leadership; it needs to be paired with self-reflection (Parsloe and Needham, 2009), ideally under the supervision of an experienced mentor (Irvine and Brundrett, 2017).

Another general issue which appears frequently in the literature surrounding leadership development is the notion of learning as a social process (e.g. Stephenson, 2010). Building on Nonaka's (1994) idea that interaction is needed for middle leaders to make tacit knowledge explicit, Stephenson (2010) emphasises the need for a community learning approach to leadership development. Woodhouse and Pedder (2017) highlight the need for a range of social support processes when facilitating the transition from early career teacher to leader, drawing upon a range of literature. These processes include: support from peers (Keogh et al. 2012; Hulme and Menter, 2014), communities of practice (Lambson 2010; Newman 2010), collaborative decision-making (Nolan and Palazzolo 2011), and professional mentoring (Knight and Moore 2012). It is therefore important that leadership development programmes maximise the opportunities for socially supported learning, through both formal and informal structures. Coaching and mentoring is a popular approach for developing leadership skills through interaction. This approach has the benefit of allowing tailored support to be provided within the school context, although there are often issues in terms of time and availability of trained coaches (Rhodes, 2012).

In summary, leadership development programmes need to support middle leaders in developing their ability to manage the self (including the development of subject knowledge and pedagogical expertise), manage time effectively, build positive relationships, communicate well and lead teams. Leaders also need support in becoming research literate and taking risks; they may also benefit from regular opportunities to reflect on their personal values and aims, and the potential role that

leadership might play in allowing them to instantiate them. Finally, it is important that any structured development programme for middle leaders makes strong connections with leaders' school experience and provides ample opportunities for community learning. We will now move on to explore how the needs of individual middle leaders might vary and the implications for leadership development.

What factors might influence the individual needs of middle leaders?

As noted in previous sections, the term 'middle leader' is a broad umbrella term, which has many guises (e.g. subject leader, curriculum leader, pastoral leader). It is important, therefore, that when considering their development needs we do not treat middle leaders as a homogenous group (Thorpe and Bennett-Powell, 2014). Instead, when designing support packages (either formal or otherwise) for middle leaders, it is important to consider the individual leader's role, stage of development and context (Irvine and Brundrett, 2016). While Irvine and Brundrett (2016) found that the needs of middle leaders in independent schools were broadly the same as those identified in previous studies within the state schools, they note the need for further research given that one case study provides an insufficient basis for generalisation.

The development needs of middle leaders are likely to vary considerably. For example, subject leaders are likely to require support with strategies for raising standards of teaching and learning within their area (Thorpe and Bennett-Powell, 2014), whereas a pastoral leader may need help with behaviour management. Similarly, the needs of subject leader (e.g. mathematics leader) may be different from a curriculum (e.g. modern foreign languages leader) or year group leader, who is responsible for leading across a range of subjects (De Nobile, 2017). It has been noted that in the latter case, there may be an increased need for support with subject expertise where teachers are expected to lead in subjects outside their individual specialism area (Thorpe and Bennett-Powell, 2014).

Similarly, we might assume that the needs of subject leaders might vary according to the subject. One secondary middle leader hinted at the need for subject specific leadership knowledge when stating that she would benefit from 'a course that shows me what a good co-ordinator is within the subject' (Thorpe and Bennett-Powell, 2014: 56). While research in this area is scarce, an early study by Bolam and Turner (2003) found that the specific subject did not have a significant impact on which leadership practices were adopted, although it did have an impact in terms of scope. For example, in science departments, leaders tended to be responsible for one of the three subjects (biology, physics and chemistry), but also had an indirect effect on the leadership of the other science subjects through collaborative working and team teaching. Although the implications of this particular finding for leadership development are not discussed by the authors, one might argue that leadership development should highlight the potential opportunities for subject leaders to widen the scope of their work to other subjects through collaborative working, as well as the benefits of team teaching. It might also, however, support the development of subject identity that acts to separate subject leaders in ways that suggest that other subjects are different and unrelated.

Recently, Spillane and Hopkins (2013) demonstrated that schools organise teaching differently depending on the subject (Hayton and Spillane, 2008; Spillane and Hopkins, 2013) and that school staff exhibit different advice seeking behaviours depending on the subject of interest (Spillane and Hopkins, 2013). Spillane and Hopkins (2013) found that teachers were more likely to ask for advice about literacy than about mathematics; and they were more likely to ask advice about mathematics than science. However, the study also identified that this was likely to be due to the way that

leadership was organised differently across subjects (i.e. there were more literacy leaders available for advice than for maths or science), rather than due to the inherent nature of the subject itself. Further work is therefore needed to explore in depth the potential differences in leadership practices across subjects, and the implications for the subject-specific development needs of middle leaders. This could be undertaken through a comparative study of subject leaders in primary and secondary phases and between different curriculum areas. Such a study might involve diary capture of activity over a set short period alongside semi-structured interviews. A questionnaire based on this data could then be circulated to determine the wider applicability of the findings.

The age phase within which a middle leader is situated (Bickmore, 2011) and the size of the school (Bolam and Turner, 2003) is also likely to have an impact on leadership practices and subsequent developmental needs (Bolam and Turner, 2003). While the vast majority of middle leadership literature is centred around secondary schools, primary school middle leaders face particular challenges associated with (often) having to lead across a non-specialist subject (Hammersley-Fletcher, 2002). In the case of small rural schools, another challenge involves having to adopt several leadership roles simultaneously, where the number of initiatives which can be realistically taken on is reduced (Tuck, 2009). Primary school middle leaders may therefore need additional support in terms of developing subject specific expertise and managing their time across a number of different roles. It has also been noted that small primary schools provide an increase in leadership opportunities and a proximity to the headteacher, which can be beneficial in terms of developing leadership potential (ibid). Secondary middle leaders, on the other hand, tend to work in much bigger schools, and are therefore likely to be leading bigger groups of staff, potentially across a number of departments (De Nobile, 2017). Although Turner and Bolam (2003) demonstrated that size of department has an impact on the practices of middle leaders, there is a dearth of recent research exploring the impact of scale and age phase on leadership practices and consequent differences in development needs.

Leaders within rural schools are also likely to encounter specific challenges. Within the UK, rural schools often struggle to fill deputy and headship positions (Howson, 2002; Brogden, 2003), making the notion of 'homegrown leadership' especially pertinent. Thomson (2009), however, has noted that this strategy is only effective if certain contingencies are in place:

- Provision of a range of leadership opportunities, both within school and across clusters of schools;
- Structures which allow teachers to experience a variety of leadership roles;
- Time for emerging leaders to reflect on their leadership practice;
- Formal input on theories of leadership;
- Opportunities to speak to more experienced leaders;
- Processes to support career development such as shadowing and networking.

Thomson (2009) highlighted that homegrown leadership is associated with the following potential pitfalls: schools missing out on the benefits of 'new blood' coming in (bringing fresh ideas and alternative perspectives with them); the potential for poor practice to be reproduced; and the risk that leaders staying in the same school for too long will limit their ability to secure other positions elsewhere in the future (: 40). While these issues might apply to any context where leaders 'rise up through the ranks', schools with recruitment issues such as those within rural (Howson, 2002; Brogden, 2003) or socially disadvantaged areas (Woodhouse and Pedder, 2017) are likely to be particularly affected.

Carter (2003) compared leadership practices in small and large primary schools. It is noted that leaders in small schools may be expected to play a larger role in the community and that they are presented

with a larger challenge than other schools in terms of managing competing time commitments. While Carter's review (2003) focuses primarily on leadership at the headship level, the potential for small schools to form clusters is also relevant to middle leaders. Carter summarised the outcomes of clustering as: providing expertise; widening pupils' opportunities; sharing the management load and increasing staff development – all actions which are central to the middle leader's role. Carter (2003) noted that while clustering is potentially advantageous for leaders in small schools, there are a number of potential problems associated with it, such as the time to set up and sustain collaboration; differences in ethos between schools; competition for pupils; lack of funding for cluster activities; and rivalries between communities (although this is rare). One might argue, then, that middle leaders working in small schools could benefit from training on developing effective networks and managing any associated barriers to effective partnerships with other schools as well as the local community. While a number of further studies have been conducted to investigate the particular challenges experienced by small schools (e.g. Southworth, 2004; Jones, 2009; Catterson, 2017), this work has focussed primarily on the implications of scale for head teachers. There remains a need for research into specific needs of middle leaders within small schools and the implications for leadership development programmes.

As well as role, scale and age phase, we also need to consider the impact of leadership stage when assessing middle leaders' development needs (Irvine and Brundrett, 2017; Woodhouse and Pedder, 2017). Horizontal transitions have been shown to be more problematic than movement up a hierarchical structure (Hay Group, 2005). Unfortunately, there is little information in this working paper on why this is the case. The transition from teacher to novice leader has also been found to be especially challenging, with Gardiner (2012) arguing for early leadership support which is 'aligned with new teachers' needs and context' (: 195). Irvine and Brundrett (2017) argue that leadership support needs to be tailored to the level of experience of middle leaders, noting that while early leaders may benefit from support that helps clarify expectations and minimises a sense of helplessness, middle leaders may continue to require support with interpersonal factors, despite growing in confidence in this area. Moreover, as they gain in teaching experience, their leadership learning will change in quality and depth.

It is important to consider which aspects of leadership are likely to be the most challenging across the board when tailoring packages of support for middle leaders. While we have suggested that there may be different challenges associated with differing roles and contexts, a common theme across the literature is that many middle leaders perceive managing other staff as being most challenging (Busher et al., 2011; Ng and Chan, 2014; Irvine and Brundrett, 2017). One middle leader commented:

'I underestimated the staff factor. The management of the staff is the biggest part of the job, it's not the boys, it's dealing with the staff, and making your job far more complicated. I wish I'd known more about that...that's what I've learnt and probably underestimated before coming into the job.' (Irvine and Brundrett, 2017: 11).

It is also important to note that leaders often find it difficult to articulate what their development needs are and that the overemphasis on raising standards may act to cloud leaders' judgements about what skills they really need to develop (Thorpe and Bennett-Powell, 2014). Leaders within Thorpe and Bennett-Powell's (2014) study:

‘expressed high levels of confidence in raising learning and teaching standards, [but] they also identified this as a high priority in terms of immediate need and urgency for further development.’ (: 54)

The authors suggested that this seemingly paradoxical perspective might be a reflection of the standards agenda overshadowing the leaders' actual development needs.

The preceding discussion has demonstrated that while many competencies are common to all middle leadership roles, some will be more or less important depending on the specific position, context and level of experience of the individual leader. Thus, there is a need for professional development programmes that are context-specific and which are sufficiently flexible to be tailored to individual needs. While further research is needed around which professional development approaches are most effective (Fluckiger et al, 2015), developing professional learning communities (Forde, 2011) and coaching and mentoring approaches (Thorpe and Bennett-Powell, 2014) might be advantageous given their flexibility and the fact that they are both situated within the school context.

Table summarising development needs

It is difficult to disaggregate issues relating to subject leadership, middle leadership, secondary and primary phase schools, specific subjects and locality/culture; however, we have identified some common themes alongside tentative indications relating to the role of the subject and other contextual factors, summarised in the table below.

Skill / competency	Primary	Secondary	Subject-specific	Other contextual factors (size, location, etc.)
Managing senior, equivalent and junior colleagues	<p>Middle leaders find managing others the most challenging aspect of their role (Busher et al., 2000).</p> <p>Middle leaders need to establish positive relationships with staff (De Nobile, 2017; Gregory, 2017).</p> <p>Subject leaders feel pressure from below as well as above (Fullan, 2010; Marshall, 2012).</p> <p>A key aspect of the middle leader's role is to support others in developing their practice (Forde, 2011).</p> <p>Consultation with teachers is often enacted through the middle leader (Hammersley-Fletcher and Strain, 2011).</p> <p>Middle leaders should develop a culture of reciprocity where teachers are encouraged to share their strengths</p>		<p>Burch and Spillane (2005) noted that leaders of mathematics emphasised the need to deal with teachers' anxieties surrounding the subject. While there is very little mention of the need for subject leaders to explore teachers' attitudes to their subjects, research suggests that attitudes have a profound impact on teaching (e.g. Watson, 2012) and therefore we would argue that this is an important area for subject leaders to address.</p> <p>The amount of time spent providing advice to teachers varies according to subject (Spillane and Hopkins, 2013). Literacy leaders were called upon more often than mathematics leaders, who, in turn, were called upon more often than science leaders (ibid).</p> <p>Mathematics leaders were found to also be involved in 'brokering'. While literacy expertise was considered to be distributed evenly across the school, mathematics expertise tended to be</p>	<p>Leaders in socially disadvantaged areas where teacher retention is a common problem need to be especially mindful of the need to maintain high morale among staff. One proposed strategy to boost motivation and retention is to provide early leadership opportunities and career development (Woodhouse and Pedder, 2017).</p> <p>Jorgensen (2016) found that in remote areas of Australia, the teaching staff were mainly comprised of early career teachers, and so a key role of subject leaders was to support these members of staff.</p>

so that all teachers are able to achieve the highest levels of instruction within the school (Elmore, 2008).

The middle leader's role is one of facilitator – supporting staff in co-constructing their own meanings and understandings together (Lambert, 2009; Stephenson, 2010).

Middle leaders need to be effective communicators so that they can share their 'ideas, experiences and practice' successfully with colleagues (Forde, 2011:162).

Middle leaders need to provide carefully considered feedback, which clearly identifies areas of development for staff within their teams (Southworth, 2011).

Promoting collegiality was considered an important aspect of the role of subject leaders (Aubrey-Hopkins and James, 2002; Ribbins, 2007; Friedman, 2011).

Communication with colleagues needs to be open and honest to engender trust (Duignan, 2012; Edwards-Groves, Grootenboer, and Ronnerman 2016; Hoy and Miskel 2012).

Monitoring the work of other teachers is a key part of the middle leader's role (De Nobile, 2017).

associated with the upper grades. While it is unclear if these findings (from US elementary schools) would be replicated within the UK, it might be useful for subject leaders to consider distributions of subject expertise within their schools and the potential need to support teachers in sharing their expertise and experience with one another.

Mathematics leaders reported a tension between working collaboratively with teachers while also monitoring their practice. When coping with this conflict, mathematics leaders felt it was important for them to be credible and accepted by their teams (Jorgensen, 2016).

Middle leaders tend to feel uncomfortable about monitoring other staff, preferring to focus on children's work instead (Hammersley-Fletcher and Strain, 2011).

Managing self

Middle leaders need to manage their own professional development, ensuring that they are up to date in terms of content knowledge, subject pedagogy and leadership skills (Bush & Glover, 2014).

Middle leaders need to develop emotional intelligence to be able to understand the behaviour of others within their teams (Held and McKimm, 2012).

Self-awareness is an important characteristic for effective leaders (Irvine and Brundrett, 2016).

While the literature review did not draw out any studies explicitly addressing the impact of specific subjects for 'managing self', one might argue that the professional development aspect of this is likely to be harder in cases where leaders are managing non-specialist areas. This occurs frequently in the primary phase (Hammersley-Fletcher, 2002) but may also apply to secondary subject leaders teaching shortage subjects who may not have a degree in that particular area. In these cases, leaders might benefit from additional support in developing their subject-specific expertise.

Leaders might find it especially challenging to manage their own professional development in small rural schools where they have multiple responsibilities and are likely to be leading across non-specialist subjects (Tuck, 2009).

Time management

Effective leaders sustain high levels of motivation (Davies and Davies, 2011).

Middle leaders need to be able to cope with the emotional aspects of the role (De Nobile, 2017).

Middle leaders often find it difficult to find time for reflection (Davies, 2009) and to find time to coach individual teachers (Rhodes, 2012).

Middle leaders find it hard to juggle competing demands on their time (Bolam and Turner, 2003; Rhodes, 2012; Thorpe and Bennett-Powell, 2014).

Time is a frequent barrier to staff development (Fitzgerald and Gunter, 2006; Rhodes, 2012; Hatcher, 2012)

Middle leaders need to allocate time for staff to discuss and share ideas (Davies and Davies, 2011).

Within a coaching context, it is essential that learner time is used effectively (Rhodes, 2012)

The status of subjects across the curriculum is not distributed equally, with core subjects receiving more time, attention and resources than non-core subjects (Hammersley-Fletcher, 2002).

Within the core subjects, senior leaders are found to be more heavily involved in initiatives relating to literacy than mathematics (Spillane and Hopkins, 2013). In U.S. elementary schools senior leaders are more heavily invested in literacy than mathematics, which in turn is invested in more than science leadership (ibid).

One might assume, therefore that issues of time management are likely to vary according to subject. For example, while literacy leaders might be given more time to conduct their leadership duties than non-core subject leaders, they may also be under additional pressures in terms of accountability than other subject leaders, especially in the primary phase

In rural primary schools where leaders are responsible for multiple subject areas, the number of initiatives which can be taken on is reduced (Tuck, 2009). Leaders therefore need to prioritise carefully how they use their time and the time of other colleagues.

	<p>'Managing time' is identified as one of the five key behaviours which middle leaders adopt to carry out their roles successfully (De Nobile, 2017).</p>	<p>where only the core subjects are subject to high stakes testing.</p>		
<p>Managing resources</p>	<p>Middle leaders also play a role in addressing the time constraints of others within their teams (Rhodes, 2012; Harris and Jones, 2017b).</p>			
	<p>According to Southworth (2011), in order to lead staff, middle leaders were responsible for managing materials and budget.</p>	<p>Music leaders (both in primary and secondary phases) and poetry leaders were responsible for resourcing the subject (Harvey and Beaucham, 2005; Beauchamp and Harvey, 2006; Lambirth, Smith and Steel (2012).</p>	<p>No studies were found relating to resource management in specific school contexts.</p>	
<p>Becoming facilitated to have agency and power</p>	<p>Subject leaders in both phases of education were responsible for managing resources (Hammersley-Fletcher, 2002; Ghamrawi, 2010).</p>	<p>One might also speculate that scarcity of resources might present a particular challenge for leaders of non-core subjects which (as explored above) tend to be less heavily invested in than core subjects.</p>		
	<p>Middle leaders' agency may be constrained by external agendas, policies and accountability to a range of stakeholders, making it hard for them to take risks and drive innovative practice (Hammersley-Fletcher and Strain, 2011; Hatcher, 2012).</p>	<p>Chatwin (2004) found subject leaders could maximise their agency and transformational capacity by developing the ability to: capitalise on multiple memberships and levels of involvement in schools; present persuasive rationales; build and maintain alliances across different stakeholders; develop effective relations across departments; understand the</p>	<p>Core subjects (maths, English and science) are more susceptible to top-down control (e.g. Burch and Spillane, 2005). It might therefore be especially important for subject leaders in these areas to explore ways to have agency despite the constraining influences of policy and external accountability frameworks (Hammersley-Fletcher and Strain, 2011).</p>	<p>No studies were found relating to issues of agency within specific school contexts.</p>
		<p>On the other hand, although this is not explored explicitly within the literature, leaders of non-core subjects may benefit from exploring ways to exert influence in subjects</p>		

Access to literature and undertaking critically reflective research activity

consequences of different actions within the school.

which receive less attention and resources than core subjects.

Middle leaders need to have up to date expertise in order to maintain confidence and credibility (Southworth, 2011).

Expertise may be achieved through academic study (Shank and Brown, 2013; Waring and Evans, 2015): through national courses (Rhodes et al, 2009), Master's courses or reflective reading groups (Davies and Davies, 2011).

Leaders need to be research literate (DfE, 2016; Evans et al., 2017).

Leaders should use the literature to inform evidence-based approaches to pedagogy (Cordingley, 2016; Harris and Jones, 107b; Waring and Evans, 2015).

Middle leaders should encourage other teachers to engage in research activity (Cordingley, 2015; Hammersley-Fletcher et al., 2017; Harris and Jones, 2017b).

Practitioner research can be transformative in terms of teacher engagement and identity as well as practice (Hammersley-Fletcher et al., 2017).

A subject-specific challenge which might be faced by some leaders is availability of relevant literature. While undertaking the literature review reported here, much of the literature explores examples of leadership relating to the core subjects with a bias towards literacy and mathematics. While many of the key findings may be applicable to other subjects, subject leaders might benefit from access to a research base which relates more directly to their area (e.g. leadership case studies within their subject, articles about subject-specific pedagogy, etc.).

No studies were found relating to the importance of practitioner research within specific school contexts; however, one of the key arguments for a research based approach is that by researching your own practice, you are able to work towards an approach that works well for your particular group of learners within your specific context, rather than using a 'one size fits all' approach (Evans et al., 2017).

**Innovation,
flexibility and risk
taking**

Middle leaders need to adapt their practice in light of the context (Grint, 2003), especially in the current time of great change (Harris and Jones, 2017a).

Teachers report risk-taking as a key leadership behaviour (Fitzgerald and Gunter, 2006).

Innovation can be fostered through collaboration (Muiji and Harris, 2006).

Teachers can be supported to take risks through provision of a 'third' collaborative, discursive space (McIntyre and Hobson, 2016).

Middle leaders have an important role to play in the cultivation of a culture where mistakes are accepted as part of the learning process (Muijis and Harris, 2006; McIntyre and Hobson, 2016).

In the primary phase, due to the nature of poetry, it often gets pushed back, or dropped altogether in light of other priorities. Because of this, subject leaders have to be flexible and show teachers how they can integrate poetry into other work (Lambirth, Smith and Steele, 2012).

Burch and Spillane's work (2005) suggests that attempts to be innovative in mathematics may be thwarted by an emphasis on materials and schemes, rather than a focus on how children learn. Again, while this work is based in the US, the shift towards textbook based practice in mathematics across many UK schools, suggests that this issue may also be relevant in the UK.

Attempts to be innovative may be especially challenging in the core subjects where external constraints are felt most strongly (Hammersley-Fletcher and Strain, 2011).

On the other hand, it might be difficult to motivate others to be innovative within non-core subjects (especially in primary) where they may feel that most of their time and energy needs to be put into literacy and mathematics (Hammersley-Fletcher, 2002).

The need for innovation is especially important in small schools where schools might miss out on 'new blood' coming in, and where there is the potential for poor practice to be reproduced (Thomson, 2009).

Influencing teaching and learning through subject pedagogy

Subject knowledge and pedagogical content knowledge were considered key skills for subject leaders (Poultney, 2007; Ghamrawi, 2010; Jorgensen, 2016).

Middle leaders require subject-specific expertise in relation to curriculum, pedagogy and assessment practices (Heng and Marsh 2009; Gurr and Drysdale, 2013; Abdul Razzak 2015; Dinham 2016).

Curriculum development was an essential aspect of the subject leader's role in both primary and secondary phases (Hammersley-Fletcher, 2004; Ghamrawi, 2010).

Modelling good practice (Hammersley-Fletcher, 2004; Jorgensen, 2016) and monitoring colleagues were perceived as ways of subject leaders influencing teaching and learning (Aubrey-Hopkins and James, 2002; Hammersley-Fletcher, 2004; Ghamrawi, 2010; Friedman, 2011; Jorgensen, 2016).

Supporting staff on a daily basis was found to be a key aspect of the subject leader's role (Hammersley-Fletcher, 2002; Ribbins, 2007; Friedman, 2011).

Middle leaders influence practice through individual discussions with teachers, collaborative working and team teaching (Bolam and Turner, 2003).

Spillane and Hopkins (2013) note that instruction is not 'monolithic', but subject specific (p. 722). Although the implications of this are not fully explored in terms of how this might impact on development needs, one might argue that subject leaders need the opportunity to explore the identity of their subjects in depth and the specific challenges faced by teachers within that area. The five dimensions along which subjects differ suggested by Grossman and Stodolosky (1994) might provide a useful starting point for these discussions.

In the secondary phase, music teachers were responsible for curriculum development (Harvey and Beauchamp, 2005).

In the primary phase, music leaders supported non-musicians in developing their expertise. This support focused on improving subject knowledge and developing teacher confidence (Beauchamp and Harvey, 2006)

Primary literacy leaders were also involved in developing teacher confidence around the teaching of poetry (Lambirth, Smith and Steel, 2012). It was noted that poor knowledge of poetry was having a negative impact on pedagogy.

No studies were found which focussed explicitly on the implications of specific contexts for influencing teaching and learning, although they are implied within other parts of the table (e.g. leading larger groups within secondary schools, etc.).

Teachers seek advice from subject leaders about pedagogy (Spillane and Hopkins, 2013).

Middle leadership can have a positive impact on teaching quality (Thorpe and Bennett-Powell, 2014).

Middle leaders view raising standards in teaching and learning as being central to their role (Thorpe and Bennett-Powell, 2014).

Middle leaders have a responsibility to develop their own practice as well as the practice of others (Forde, 2011).

Middle leaders should lead by example and enthusiasm, rather than by imposing mandates onto staff (Hammersley-Fletcher and Strain, 2011).

Being responsible for staff development was found to be a key aspect of the role of subject leader (Hammersley-Fletcher, 2002; Aubrey-Hopkins and James, 2002; Beauchamp and Harvey, 2006; Lambirth, Smith and Steele, 2012; Ghamrawi, 2010). This was often done through INSET days, which were particularly useful when catered directly to the staff attending them.

As well as supporting teachers in developing their subject knowledge, the literacy leaders within this study also developed a cross-curricular approach to the teaching of poetry to ensure that poetry was not side-lined by other aspects of literacy (Lambirth et al, 2012).

Mathematics leaders in Australia developed mathematics pedagogy by supporting teachers with differentiation and taking into account the nature of the school context. There was also an emphasis on evidence-based strategies, including assisting teachers with collecting data from students, interpreting it and using it to develop new learning programmes (Jorgensen, 2016).

Schools organise teaching differently depending on the subject (Hayton and Spillane, 2008). In science departments, leaders tended to be responsible for one of the three subjects (science, physics and chemistry), but also had an indirect effect on the leadership of the other science subjects through collaborative working and team teaching (Bolam and Turner, 2003). One might argue that leadership development should highlight the potential opportunities for subject leaders to widen the scope of their work to other subjects through collaborative working, as well as the benefits of team teaching. Alternatively, it might support the development of a strong subject identity that acts to separate subject leaders in ways that

Leading non-specialist/multiple subject areas

Primary school middle leaders often have to lead across non-specialist subjects (Hammersley-Fletcher, 2002), sometimes with multiple leadership responsibilities (Tuck, 2009).

suggest that other subjects are somehow different and their work unrelated.

Burch and Spillane (2005) found that leaders tended to view instructional leadership in literacy and mathematics differently. In literacy the emphasis was put on school based support and collaborative working, drawing upon expertise across the school. In mathematics, external provision was more valued, e.g. adoption of external schemes of work and formal training; however, those leaders who spent more time with teachers realised that integration of external and internal support was most effective. This suggests that leadership programmes might benefit from exploring preconceptions about what leadership in a particular subject might look like, while emphasising the need to work closely with teachers in order to assess their needs more accurately.

While the literature is not explicit about the development needs of primary leaders who are expected to lead across non-specialist or multiple subject areas, one might imagine that these leaders would benefit from additional support in terms of both content knowledge and subject-specific pedagogy.

Teachers are more likely to be asked to lead across a number of subjects within small, rural schools (Tuck, 2009)

Leading large groups of staff

The size of the department and its physical location in the school were influencing factors in head of departments' perceived impact on quality of teaching and learning (Bolam and Turner, 2003).

In addition, for those leaders managing several subjects, we would expect time management (discussed above) to be especially challenging.

Music subject leaders were responsible for managing peripatetic staff, in both primary and secondary phases (Harvey and Beauchamp, 2005; Beauchamp and Harvey, 2006)

Secondary middle leaders, tend to work in much bigger schools, and are therefore likely to be leading bigger groups of staff, potentially across a number of departments (De Nobile, 2017). This has clear implications for time management. It may also be harder to maintain a coherent vision within a larger group, although this point is merely speculative and needs further investigation.

Middle leaders often have to lead multiple groups of staff (De Nobile, 2017).

Offering early leadership opportunities for other teachers

Teachers should be developed as leaders from the onset of their teaching careers (Elmore, 2008; Woodhouse and Pedder, 2017) as a strategy for improving motivation and retention. Middle leaders, therefore need to develop the skills to promote leadership in others.

There was no mention of subject-specific implications for middle leaders providing leadership opportunities for others, although one might argue that it would be very useful for future leaders to hear from subject leaders about the subject-specific challenges and successes that they have encountered when leading their specific area, especially given that experience has been noted as key to leadership development (Irvine and Brundrett, 2016).

The role of middle leaders in supporting teachers to become future leaders is especially pertinent in schools with recruitment issues, such as those within rural (Howson, 2002; Brogden, 2003) or socially disadvantaged areas (Woodhouse and Pedder, 2017). It is important that as well as learning from other leaders within school, developing leaders receive

'Homegrown leadership' is only effective when schools provide: a range of leadership opportunities, experience across a range of leadership roles, time for reflection, input on theoretical perspectives on leadership, opportunities to confer with experienced leaders and

Working with local communities and across school networks

processes to support career development (Thomson, 2009).

Through building a shared commitment among teachers, governors and parents, subject leaders were found to enhance curriculum development and practice (Hammersley-Fletcher, 2004).

The creation of networks can support subject leaders' professional development (Ritchie, MacKay and Rigano)

Music was considered different from other subjects in the sense that it had a very public position due to its involvement in concerts, etc. (Beauchamp and Harvey, 2006).

formal input on theories of leadership (Thomson, 2009).

Leaders in small schools may be expected to play a larger role in the community (Carter, 2003).

Formation of cluster networks for small schools has the potential to provide expertise, widen pupils' opportunities, share the management load and increase staff development (Carter, 2003).

Leaders need to develop ways to overcome the potential pitfalls of networking: time commitment, lack of funding and problems associated with rivalries between communities (Carter, 2003).

Much of recent work into challenges for small schools has focussed on the work of headteachers (Carter, 2003; Southworth, 2004; Jones, 2009; Catterson, 2017). Further work is needed to explore the challenges faced by middle leaders within small schools.

Taking responsibility and being accountable

Middle leaders can contribute to school strategy through influencing those above (Chatwin, 2004).

Effective schools engage in participative leadership where responsibility and accountability are shared throughout the school (Harris 2004; Spillane, 2005; Timperley, 2005; Gunter et al, 2013).

Departmental units can be powerful drivers of change within schools (Ritchie, MacKay and Rigano, 2006). Leaders need to explore the potential power of collaboration within department teams to effect change.

Promoting a culture of learning

Middle leaders need to foster a culture where learning is at the centre of all activities (Fitzgerald and Gunter, 2006; Davies and Davies, 2011).

Middle leaders need to support the development of professional learning communities where teachers learn alongside one another (Stoll and Louis, 2007; Ronnerman et al., 2015). Leaders therefore need opportunities to explore how such a culture of learning might be fostered.

While there were no papers dealing explicitly with subject-specific implications for leaders in terms of accountability, core subject leaders are arguably under more pressure to raise standards than leaders of non-core subject leaders, given the presence of high stakes testing within primary literacy and mathematics, and the importance placed on the number of core GCSE's attained by secondary pupils.

The flip side of this is that leaders of non-core subjects may find it hard to hold their teams to account, especially in primary schools where attainment in the foundation subjects is less visible. These are however merely speculations which need to be investigated through empirical work.

Childs, Burn and McNicholl (2013) found that collaborative learning in departments was influenced by the status and organisation of the subject as well as the leadership style.

Leaders in small schools may be more accountable to the community than in other contexts (Carter, 2003).

Collaborative learning was also affected by the presence of a space where staff can gather together on a daily basis (Childs, burn and McNicholl (2013).

Working alongside other leadership colleagues

Middle leaders play a role in facilitating the sharing of good practice across networks of schools (Southworth, 2011).

The middle leader plays a key role in consultation with staff where they represent the interests of their colleagues (Hammersley-Fletcher and Strain, 2011).

The ability to build effective relationships between the department and the senior management team (SMT) and teachers was seen as an essential part of the role of subject leader (Chatwin, 2004; Poultney, 2007; Ghamrawi, 2010).

Fostering good relations with the SMT can assist when it comes to time allocations (Hammersley-Fletcher, 2004), distribution of resources (Beauchamp and Harvey, 2006) and envisioning new approaches to the curriculum (Lambirth, Smith and Steele, 2012; Jorgensen, 2016).

Moral purpose

Teacher leadership should focus on improving lives (Crowther et al 2009).

Moral purpose is essential for school success (Bezzina 2012).

Leaders need to adopt a 'personal and moral perspective' (Harris and Jones, 2017a: 1).

The responsibilities of mathematics leaders were influenced by the senior management team and the whole school context. Mathematics leaders functioned as the link between the executive, the team and the classroom teacher (Jorgensen, 2016).

In rural schools, where leaders often 'rise up through the ranks' within the same school, it is important for them to have the opportunity to learn from more experienced leaders through discussion, shadowing and networking (Thomson, 2009).

Similarly, they must also provide opportunities for other potential leaders to learn from them (Woodhouse and Pedder, 2017).

No studies exploring the implications for leaders of specific subjects in relation to moral purpose were found; however, one might argue that leadership development programmes should provide opportunities for leaders to explore ways in which their subject might connect with a moral imperative.

No studies exploring the implications for leaders of specific subjects in relation to moral purpose emerged within the scope of this review, although the notion of leadership as a vehicle for improving lives (Crowther et al., 2009) is arguably especially pertinent to leaders

Thinking strategically

Middle leaders should develop a strategic vision for their subject/area (De Nobile, 2017; Irvine and Brundrett, 2017) by regularly taking stock (Davies and Davies, 2011; Harris and Jones, 2017a).

Creating a vision for the subject (Hammersley-Fletcher, 2004; Jorgensen, 2016) was considered a key aspect of subject leadership.

Creating a vision for the subject and the department, was an important role of the subject leader. A clear vision is essential for developing consistent practice (Ribbins, 2007).

No studies were found addressing the need to think strategically when leading specific subjects.

working in areas of social deprivation.

Harris and Jones (2017a) highlight the need for leaders to continuously take stock of their context to support them in thinking strategically about how to move their area forward.

General leadership skills

For middle leaders to be effective they need to engage in leadership training (Lai and Pratt, 2004; Muijs and Harris, 2006; Bush, 2016).

Music leaders reported a lack of opportunity for them to develop their leadership skills. This was because their time was prioritised towards supporting non-specialists rather than working on their own professional development (Beauchamp and Harvey, 2006).

Formal leadership training might be especially important in small rural schools where there are fewer models for potential leaders to follow, and where there is a greater risk of poor practice being emulated (Thomson, 2009).

Conclusions

This work has reviewed the literature on middle leadership in primary and secondary schools in order to gather relevant evidence to inform the development of middle and subject leader development programmes. The following section summarises the key findings.

Section three discussed the concept of leadership and provided a framework for its analysis. The term, which previously was applied to a few individuals, is now much more inclusive and allows for the participation of many more individuals. This shared understanding of leadership became the basis for the development of the concept of distributed leadership. This shift was aligned with the increasing emphasis on leadership rather than management to enact school reform. This change has generated much literature on the topic which, in turn, has created many understandings of the concept of distributed leadership. However, as Spillane (2005:149) puts it, the definition of the concept is secondary to what it means in practice and he argues that what matters is *how* the leadership is distributed. In order to create a framework for this literature review, the main conceptualisations of subject leadership have been defined as collegiality and collaboration; systems thinking; adaptive leadership; instructional leadership/ learning-centred leadership/ pedagogic learning; and boundary management.

Section four focused on subject leadership. The position/label of subject leader came into being in 1998. Initially in primary schools, the impact of this change seemed to be uncomfortable as primary school teachers were not necessarily subject specialists or did not see themselves as leaders. What is more, subject leaders did not feel qualified to perform the role, particularly the monitoring responsibilities it entailed. These issues seemed less prominent in the more recent illustrative studies above. Still, there was a common aspect across the literature – the importance given to professional development in enhancing subject knowledge and curriculum development, as well as in acquiring skills to lead and support colleagues. The illustrative examples also unveiled the importance of the relationship between subject leaders and the headteacher and SMT. General responsibilities of subject leaders were identified as: resources, documentation, influencing practice, monitoring, staff training, professional development, and liaison.

The role of subject leaders in secondary schools appeared to differ from its counterpart at primary level in that subject leaders are, in the majority of times, subject experts, and in the fact that their role is performed within a particular department. As is the case with literature on subject leadership in a primary school context, there are many gaps in the research and the existing studies have dispersed focuses, making it challenging to arrive at solid conclusions. Capabilities and aspects of the subject leader's role that were perceived as effective across the literature were the promotion of collaboration and collegiality, supporting department members' professional development, monitoring, possessing and sharing solid subject knowledge and subject pedagogical knowledge, and having effective managerial skills. The difficulty subject leaders have in feeling 'stuck' in the middle, between the department and the SMT, was a common theme in the literature. Departments were perceived as places which could instigate change. The subject leader's style influenced how collaboration took place in the department. In the studies looking at subject leadership in music and poetry, there were some common responsibilities to the subjects, e.g. resourcing the subject and supporting colleagues, but there were also differences, e.g. music subject leaders seemed to be more likely to have responsibilities related to school concerts or music events, as well as the management of peripatetic staff. In this way, we begin to see subject and phase related differences.

Section five analysed the role of the middle leader. The concept of middle leaders is a complex and contested one, with much ambiguity and uncertainty surrounding the definition of the role and who performs it. This appeared to be a consequence, if partially, of the multi-layered involvement of middle leaders and their extensive and varied list of functions and responsibilities. Still, there appeared to be a consensus that student learning is at the core of middle leadership. Research has shown the positive effect of middle leadership on teaching quality, which seemed to translate into increased pupil attainment. The importance of the culture fostered by middle leaders has received much attention in the literature, particularly the creation of a learning culture where learning is placed at the centre of everything that is done. This culture appeared to have a positive impact on the quality of teaching and learning. Moreover, it seemed to be best promoted by the adoption of a facilitative style, through the creation of opportunities for all staff to co-construct meaning and understanding; promotion of collegiality; modelling of good practice; promotion of staff development (as well as middle leaders' own); and incentivising risk-taking. Other aspects of the middle leaders' role uncovered in the literature were their involvement with staff consultation and strategic development. Finally, some of the literature highlighted the ethical and moral aspects of the role in relation to the purposes of education.

The key knowledge and capabilities required for middle leaders to perform their roles effectively were the ability to: create a sense of cohesion and shared vision; manage relationships; manage time and competing roles; communicate effectively; provide constructive feedback; manage self-expertise, motivation, and emotional intelligence; and be research literate. Some tensions within middle leadership were uncovered. Firstly, the definition of the role and its boundaries was blurry. Secondly, middle leaders, as has been said of subject leaders, appeared to find themselves in between those they lead and those who lead them. Other conflicting aspects of the role were the need to promote collaboration alongside an imperative to direct staff, or the promotion of creativity whilst having to ensure policies are implemented appropriately. There were also time constraints due to the multiple roles these practitioners performed. Finally, there were pressures to increase visibility and be accountable, whilst having limited agency.

Section six examined the developmental needs for subject and middle leaders. Subject and middle leaders' training was mostly focussed around teaching. As a consequence, there is a gap in their professional development, which may obstruct the effective performance of their leadership roles. Key aspects of development were highlighted: managing self, for example through academic knowledge (which can translate into research literacy and promote innovation through research based practice); motivational strategies and a sense of moral purpose; communicating effectively, through for example providing effective feedback to colleagues; managing relationships, through development of emotional intelligence; and managing time, which can be helpful in coping with the complexity of the role. When designing support packages, besides covering aspects that can be a common challenge to middle or subject leaders, it seems important that the individual leader's role, specific phase related needs, and stage of development are taken into consideration. For example, the leader will need different assistance whether focusing on practice, on raising standards, developing subject expertise, or year group understanding, or whether they are moving horizontally or being promoted upwards in the hierarchy. Consequently, programmes need to build in flexibility in their delivery. Equally, leaders need to be willing to be flexible in their approach to professional development. Moreover, development needs to be seen as incremental and ongoing.

Recommendations

Having considered middle leaders with responsibility for subjects through the literature there are a number of specific development and research recommendations that this literature review has highlighted that are worthy of consideration for future work.

Development implications for middle leaders

- 1) There is a need to gain insight into wider school objectives and planning, and to develop the skills to understand how a middle leadership role carries responsibility to ensure that middle leaders engage with, have input into and work within wider school improvement agendas. Thus middle leaders should be familiar with school development plans and how their work fits into this.
- 2) Middle leaders need to be developed to negotiate with senior leaders and teachers to ensure recognition of their subject area and to actively lead initiatives which create spaces for critical and creative engagement with development and problem solving. They equally need to take on accountability and responsibility for their area and any staff working within it.
- 3) Middle leaders need to develop a variety of management strategies in the area of working with other staff to gain the best performance from them, and which enable them to identify problems quickly. This should allow them to identify approaches that will best address these issues.

Development implications for subject leaders

- 1) Development programmes need the flexibility to meet varied specific needs around subject, phase, experience, and school setting. This may require some combined and some more individually guided learning approaches and should include notions of how teachers might collaborate in subject groupings even where schools are geographically isolated.
- 2) Subject leaders need to develop skills in constructive critical appraisal in order to develop the subject related practices of other staff. This could be through a mixture of monitoring activities, coaching and/or mentoring activities, leading through example and through engaging in research related activity with colleagues.
- 3) There is a need to review the activity that a subject leader role might entail. At the same time, development must build in flexibility that facilitates moves between different types of school and school culture.

Research implications

- 1) Nuances and differences across phases, subjects, and size of school need to be built into leadership development, as it is clear from the literature that these exist but that there is a

dearth of information about the detail of these differences. What we can say from the literature is that subjects under less scrutiny appear to have greater freedoms to experiment and innovate denied to higher pressure subjects. Moreover, those in charge of large numbers of staff have greater challenges in communicating their vision for the subject effectively and are potentially less influential as a result.

- 2) There is a lack of clarity about what is expected of the middle or subject leader and about what they should expect of colleagues. Research has characterised this as uneven and we might suppose that this situation is further complicated as schools form alliances, trusts, and free schools etc. This highlights an area in need of more up to date and detailed knowledge.
- 3) It is apparent that middle and subject leaders face challenges in prioritising, particularly in the light of regular governmental changes of policy emphasis. There is a lack of literature that considers exactly how leaders are managing myriad demands. Nor is there information about how they might best drive practice forward whilst preserving the best of what is already happening in their subject. Thus, how do these leaders grapple with shifts in focus on their subject, curriculum demands, freedoms and lack of freedoms and the ability to be creative and innovative, whilst drawing out the best from the staff that they work alongside?

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