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**Evolving Policy Paradigms of Middle Leadership in Scottish and Irish Education:  
Implications for Middle Leadership Professional Development**

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**Abstract**

Middle leadership is a dynamic area of policy in Scottish and Irish education to build leadership capacity. This article reports on a critical policy analysis of sequential sets of Scottish and Irish policy on middle leadership to identify codes of meaning. Two aspects are reported: (1) constructions of the purposes of middle leadership and (2) key themes in changing policy paradigms. While there is development of policy ideas from delegated tasks to management functions to leadership for learning there is little on the practice of leading learning. The findings are reviewed to identify issues related to middle leadership professional development.

**Middle Leadership in Scottish and Irish schools**

The strengthening of leadership in schools, including middle leadership, is a central policy priority in both Scottish (SG 2016) and Irish education (DES 2017, 2018). However, there is limited investigation of this layer of leadership in Scottish and Irish education. The study traces the antecedents of current policy where there are differences between the two systems in the historical development of school leadership, management and governance. The current policy convergence illustrates the way in which international policy orthodoxies (Pont et al. 2008,

OECD 2012) and policy discussions (Asia Society 2017) rather than local circumstances, shape national policy. This policy case study of sequential sets of Scottish and Irish policy texts, illustrates the tensions in policy constructions of middle leadership in schools across different systems. While the term ‘middle leadership’ might refer to both school contexts and the tier that mediates between schools and central government (OECD 2015) the focus here is on middle leadership in school. The purpose of this study is to critically appraise assumptions underpinning these sets of policies and identify issues for middle leadership professional development.

In Scottish and Irish education, as in many other systems, there are tensions between the status and power of principals/headteachers and current imperatives to foster leadership across the school. Management hierarchies continue to exist where the headteacher/principal holds significant power to influence the development and culture of a school (ES 2015, DES 2016). While the importance of middle leadership in school improvement processes is increasingly emphasised in policy, there are questions about the way middle leadership is constructed (De Nobile 2018, Grootenboer et al. 2015), a situation made more complex with current initiatives around building teacher leadership and collaborative practice (DES 2017, SG 2016) and increasing headteacher accountability (SG 2016). Research has consistently identified inherent tensions: is this a role that ‘protects’ the area of responsibility (Bennett et al. 2007) or a role contained by whole school development agendas (Javadi et al. 2017) or through which a teacher in the middle tier can exercise autonomy especially in the leading learning (Leithwood 2016, Edwards-Groves et al. 2016, Grootenboer 2018) and so contribute to policy aspirations related to improvement?

Young and Diem (2017) argue that critical policy analysis encompasses many facets of policy development and of the five research concerns they identify, our focus in this policy case study is on the origins and development of policy over time noting issues for middle leadership professional development. It is only recently in both Scottish and Irish education that the term ‘middle leadership’ has been used consistently to describe the middle layer in school this longstanding tier has undergone significant development since the 1970s. However, there is little research on middle leadership in either system. The policy analysis illuminates the tensions that emerge as policy ideas are constructed, enacted and then set aside over a period of years. Defining roles through policy might be viewed as a contractual issue of staff deployment. However, professional roles are also matters of professional identity. Policy intentions evolve over time, these are not necessarily matched fully by changes in teachers’ constructions of their role and practice where memory and generational factors can shape teachers’ understanding of their role (Goodson et al. 2006). Previous policy paradigms co-exist with current policy ideas and so these competing constructions shape the beliefs, expectations, sense of self and actions of middle leaders. Therefore middle leadership professional learning is central to achieving policy aspirations.

This article presents the findings from an ongoing project on middle leadership professional development, the first element of which is this comparative policy study of the evolution of middle leadership in Scottish and Irish schools. The article first describes the development of middle leadership in each system. Then the policy analysis findings are presented: (1) the purposes of middle leadership (2) the key themes in the evolution of the middle tier. While there is a clear development in Irish and Scottish policies from constructing the middle tier as sets of management tasks to a middle leadership of learning role, there is little focus on the

processes of middle leading of learning. The article concludes by interpreting the findings using research literature to highlight areas for middle leadership professional development.

### **The Development of Middle Leadership in Scottish and Irish Education**

A central dimension of middle leadership common to both systems is the dual nature of the role – teaching alongside ‘out-of-classroom’ responsibilities - positioned between teachers and senior leadership. Drawing heavily on current international policy imperatives from the OECD (DES 2007, OECD 2007, 2012 ) there is a shared policy aspiration (DES 2017/18, SG 2016) to utilise leadership including middle leadership in school improvement efforts but this layer has different antecedents in each system.

In Irish education initially middle tier posts were not management but ‘posts of responsibility’ intended to recompense teachers taking on additional out-of-classroom tasks at a point when increasing numbers of lay staff were replacing religious orders. Seniority - length of service - was an important criterion in appointments. Policy documents set out (DE 1973, DES 2000, 2003) a range of areas from which selected tasks could be assigned to a post holder. The White Paper, *Charting Our Education Future* (DES 1995), drawing heavily from the *Report of the National Convention* (NCS 1994), strengthened the relationship between posts in this middle level and whole-school management with Grade A/B posts becoming Special Duties Teacher. More recently, sets of professional standards on leadership and management, *Looking at Our School* (DES 2016), mark a heightened policy focus on leadership and its role in school improvement. Two circulars on leadership and management for the primary and post-primary sectors (DES 2017, DES 2018) and a *Professional Learning Continuum for Leadership* (CSL 2017) signal the further development of leadership in schools. The role and development of

middle leadership is part of these broader discussions of leadership. Middle leadership posts are now Assistant Principal I and II.

In contrast in Scotland, middle management in secondary schools is longstanding with Principal Teachers (PT) managing a department or pastoral care. Significant development of middle management followed an Inspectorate report (SED 1971) to “present the entrant to the profession and the serving teacher with an unambiguous career structure” (SED 1971, 4) with two new posts: PT (Guidance) and Assistant Principal Teacher (APT). A decade later, a key concern was the isolation of subject departments and the lack of management processes within departments. Effective departmental management became a key element of policy guidelines (HMI 1988). These posts more recently underwent a major development following the *Teachers’ Agreement* (SE 2001) (a review of teachers’ salaries and conditions). Continued concerns about the disparity between large and small departments and subject isolation led to the removal of APT posts and the introduction of Faculty Heads (FH), a PT leading several subject areas. However, this change to FH was not taken up across the sector immediately, FHs and subject PTs continued to co-exist, the PT (subject) leading a subject within a faculty. In primary schools historically, there was no middle tier. Following the *Teachers’ Agreement* (SE 2001) the post of PT was established in primary schools. Middle leadership forms part of the extended school leadership team.

### **Policy constructions of middle leadership**

Yanow (2015, 406) proposes that policies are multifaceted being “constructed texts of multiple readings” by “the various policy-relevant publics”. Yanow (2015, 406 emphasis in original)

usefully steers us away from a simple definition of policy to the more significant question: “What *work* is a policy and/or its elements, ... attempted or achieved, doing”. This dynamic definition highlights the way policies work “to classify and organise people and ideas in new ways” (Shore and Wright 2011, 3). A critical policy analysis approach was adopted to examine the intentions of sequential sets of policies thereby surfacing underpinning assumptions about middle leadership and so identify issues for middle leadership professional development. Two research questions are reported here:

- What are the stated purposes of middle leadership in school?
- What are the expected roles and responsibilities of middle leaders?

Critical policy analysis covers diverse approaches but a core concern is the interrogation of taken-for-granted assumptions and the surfacing of meaning (Young and Diem 2017). These taken-for-granted assumptions are discursively formed and shape our understanding (Atwood and Lopez 2014). Thus language is an important form of data – a means of accessing policy intentions and meanings. Perryman (2012, 308) proposes discourse analysis as “a method of examining and interpreting written or spoken words to uncover otherwise concealed feelings, messages and motivations”. This policy study uses a semiotic approach of identifying codes of meaning to interrogate the underpinning assumptions about middle leadership and identify the implications for middle leadership professional development.

O’Malley and Long (2017, 69) look to contextualise policy within its historical and political landscape, through a ‘microhistory’, a means of “mapping constellations of public representation that both defined the policy conflict and illuminated contesting discourses” (69). While the context of a specific policy reveals some of the competing ideas, an often hidden element are previous policy formulations. Peters (2007) uses Foucault’s notion of an ‘effective

history' where language rather than a chronology charts the development of policy values and ideas. This study looks to surface the way in which policy ideas and expectations related to middle leadership have evolved in Scottish and Irish education.

### **Method of Policy Analysis**

Fitzgerald (2012, 297) proposes that documentary research requires researchers “to collect, collate and analyse empirical data in order to produce a theoretical account that either describes, interprets or explains what has occurred”. To do so, Diem and Young (201, 845) recommend “concentrated looking” and this was applied to the selected policy texts to surface and so map “the architecture of meaning in policy arguments” (Yanow 2015, 407). In this endeavour to map meaning, themes were systematically identified and categorised. Drawing from Miles and Huberman (1998) an iterative method was adopted. Broad categories related to the research questions were generated to guide the initial collection of data. Then, through reading and re-reading of the policy documents, broad themes were identified for each text. These themes were systematically applied across texts and data was then reduced into codes of meaning. The final step was to review these codes of meaning and then use these to track the way in the middle layer has evolved over sequential policy statements.

The selection of documents should be guided by the following criteria: authenticity, credibility, representativeness, meaning (Fitzgerald 2012). The selected documents are ‘authentic’ being documents written by the national body responsible for decision-making and can be deemed credible accounts of policy positions at particular historical moments. The representativeness of the documents might be an issue, given that policy texts are accompanied by supplementary material. The focus here is on the foundational texts that set policy direction and so provide insight into the dominant policy meanings. The documents analysed (Table 1) include policy



statements, inspectorate reports, national circulars, contractual agreements and professional standards.

**Table 1: Policy Documents Analysed**

Scotland	Ireland
<p><i>The Structure of Promoted Posts in Secondary Schools in Scotland.</i> (SED 1971)</p> <p><i>Learning and Teaching in Scottish Secondary Schools.</i> (HMI 1984)</p> <p><i>Effective Secondary Schools.</i> (HMI 1988)</p>	<p><i>Circular 16/73</i> (DE 1973)</p> <p><i>Charting Our Education Future</i> (DES 1995)</p> <p><i>Circular 6/97</i> (DE 1997)</p> <p><i>Circular 05/98</i> (DES 1998a)</p> <p><i>Circular 20/98</i> (DES 1998b)</p> <p><i>Circular 25/98</i> (DES 1998c)</p> <p><i>Circular 17/00</i> (DES 2000)</p>
<p><i>Teachers' Agreement</i> (SE 2001)</p> <p><i>Leadership – A Discussion Paper</i> (SE 2005)</p> <p><i>Journey to Excellence</i> (HMIE 2006)</p> <p><i>Leadership for Learning</i> (HMIE 2007)</p>	<p><i>Circular 29/02</i> (DES 2002)</p> <p><i>Circular 07/03</i> (DES 2003)</p>
<p><i>Standards for Middle Leadership and Management</i> (GTCS 2012).</p> <p><i>How Good is Our School</i> (ES 2015)</p> <p><i>Educational Leadership Development Framework</i> (SCEL 2016)</p> <p><i>Delivering Equity and Excellence in Scottish Education</i> (2016)</p>	<p><i>Circular 0039/2014</i> (DES 2014)</p> <p><i>Looking at Our School</i> (DES 2016)</p> <p><i>A Professional Learning Continuum</i> (CSL 2017)</p> <p><i>Circular 0063/2017</i> (DES 2017)</p> <p><i>Circular 0003/2018</i> (DES 2018)</p>

### **The Purpose of Middle Leadership**

The middle tier in primary and post-primary Irish schools is included in the various restructurings of in-school management, the purposes of which, presented in *Charting Our Education Future* (DES 1995), are reiterated through subsequent documents: to better address the management needs of the school and provide “opportunities for teachers to assume responsibility in the school for instructional leadership, curriculum development, the management of staff and their development, the academic and pastoral work of the school (DES 1998, 1). In the recent policies middle leadership is specifically linked to school improvement: “Assistant Principals occupy positions of strategic importance in the leadership, management and administration of the school” (DES 2018, 6) with their work of “contributing to the pedagogic and organisational advancement of the school” (DES 2018, 17).

In early Scottish policies PTs are part of whole-school management: “Subject principal teachers occupy an important position in the present structure of the school” (SED 1971, 21) and further, “effective management of subject departments is vital to the work of the school” (HMI 1984, 19). The *Standards for Middle Leadership and Management (SfMLM)* (GTCS 2012, 8) uniquely includes a clear statement of purposes related to pupil learning: “Middle leaders, within their areas of responsibility, lead and collaborate with team(s) to establish, enhance and ensure high quality learning experiences and outcomes for all learners.”

### **The Evolution of the Middle Tier: Ireland**

Three themes were identified from the analysis of Irish policy documents which chart the evolution of middle leadership. These are (1) delegation to distributive leadership where the

delegation of tasks is replaced by collaborative leadership across the school; (2) ‘duties’ to leading learning: lists of tasks for post holders are replaced by the responsibilities of middle leadership for leading learning; and (3) experience to leadership capabilities where seniority is replaces leadership capabilities in selection criteria.

### *Delegation to Distributive Leadership*

“Senior teacher posts” initially are a means of freeing school principals from operational management (DES 1995, 165). The list of possible tasks for post holders is reiterated through several policies, but the reason for these posts changes from concerns about the workload of school principals (DE 1973) to provide opportunities for career progression and professional development (DES 1995). Another thread is the contribution of leadership in school improvement: “a strong relationship between positive school leadership and institutional effectiveness” (*Report on the National Education Convention 1994*, 42; cited in DES 1995, 161) and policies increasingly defined leadership, including middle leadership, in terms of leading learning.

In current policies, leadership is conceptualised partly as school leadership exercised by senior staff and partly as a generic process exercised across a school. The domains of leadership and management in *Looking at Our School* (DES 2016) detail the actions of formal leadership roles: “The term ‘school leaders’ typically refers to these formal leadership roles, and also includes posts of responsibility and those who have undertaken roles related to the school’s priorities” (DES 2016, 17). Part of the task of formal leaders is ‘engage’, ‘encourage’, ‘enable’ teachers to exercise leadership and collaborative practice: “The quality framework views schools as dynamic learning organisations, where teachers are enabled to work individually and collectively to build their professional capacity in order to support continuous improvement in teaching and learning.” (DES 2016, 7). While the leadership role of teachers is not specifically

codified in the Leadership and Management domains, the fourth domain of Teaching and Learning presents out-of-classroom activities: “teachers’ collective/collaborative practice” (DES 2016, 20) covering collaborative developments, curriculum planning, assessment, and sharing expertise. This balancing of formal leadership roles with distributive forms of leadership is also evident in the recent policies (DES 2017, 1.3):

The leadership model should align the responsibilities of senior (Principal/Deputy Principal) and middle leadership (post holders) more clearly to the identified needs and priorities of the school, underlining the range of responsibilities for various leadership roles and providing opportunities for teachers to develop their leadership capacity” (DES 2017, 1.3).

These recent circulars present a management structure where senior and middle levels are complementary processes contributing to participatory approaches: “leadership is distributed throughout the school as a key support for pupil learning” (DES 2017, 4).

The White Paper, *Charting Our Education Future* (DES, 1995) proposed a wider vision of the school where improvements in pupil learning rest on the leadership and management of a school: “the changes involve a major transformation in schools, in terms both of a school’s organisation and its operating culture” (DES 1995, 166). Several sequential policies for primaries identify possible tasks that could be delegated to post holders (DE 1973; DES 2000; DES 2003). Predominantly, these duties were organisational tasks such as the supervision of special classes and pupils during breaks, cover for absent teachers, paperwork for liaison or administration, resource allocation, school library and out-of-school activities. There were some limited examples of duties relating to teaching and learning – responsibility for a curriculum area or a school activity (music, sports, religious education). Similarly in post-primary possible duties included responsibility for a set of students or area, administrative

tasks, different extra-curricular activities and liaison work. Also included were some broader coordination roles: for staff development, school policies and the curriculum (DES 1998a,b,c; DES 2002). In current policy statements for Assistant Principals (I & II), these lists are replaced by broad areas (Table 2) which are much more strategically focused on learning including professional learning.

**Table 2: Leading Learning: Primary and Post Primary in Ireland**

Primary:	Post- Primary
<ul style="list-style-type: none"> <li>• learning and teaching</li> <li>• leading school development (including curriculum development)</li> <li>• pupil support including wellbeing</li> <li>• school improvement</li> <li>• leadership/management and development of individuals and staff teams</li> <li>• special education and inclusion</li> <li>• supporting new teachers induction</li> </ul> <p>(DES 2017, 7).</p>	<ul style="list-style-type: none"> <li>• curriculum and learning</li> <li>• student support and wellbeing</li> <li>• school improvement</li> <li>• leadership/management and development of staff teams</li> </ul> <p>(DES 2018, 7)</p>

*Experience to leadership capabilities*

Restructuring in-school management was intended to provide opportunities for teachers to exercise leadership – a stance that continues in current policy:

Cognisance should also be taken of the importance of affording post holders the opportunity to build on and develop their leadership skills and capacities by assigning

them to different leadership roles in the school where possible. This is seen as an important element of their own professional development (DES 2017, 19).

However, there has been a longstanding issue around whether these are posts with assigned tasks or are leadership roles. The *Report of the Convention* (NCS 1994, cited Stack 1995, 273) noted an unwillingness by post holders to accept any responsibility for the management of staff which suggests limitations to this role.

Among other issues noted by Stack (1995) was a lack of clearly defined selection procedures. In revised procedures seniority remained significant along with a willingness and capability to participate in the additional responsibilities of middle management (DES, 2000, section 9h i-iii). Subsequently, though seniority was still considered, increasingly leadership and management comprise the criteria for appointment: knowledge, interpersonal and communication skills; the capacity to contribute to the school's development and management (DES 2011, Section 2). In the recent policy circulars for both primary and post-primary (DES 2017, 2018) criteria for appointment are based on the four domains of leadership and management from *Looking at Our School* (DES 2016). Seniority is being phased out (DES 2018, 25).

### **The Evolution of the Middle Tier: Scotland**

In tracing the development of middle leadership in Scottish schools, three broad themes were identified: (1) hierarchies to 'leaders at all levels': the move from a hierarchical management structure to forms of leadership exercised across the school; (2) from departmental management to a broader conceptualisation of middle leadership; (3) defining effectiveness: effective practice is codified firstly, as management of a department and more recently in terms of the contribution to the school's improvement agenda.

### *Hierarchies to leaders at all levels*

There is a significant development in Scottish policy intentions from hierarchical management to distributive leadership. The SED (1971) report presents a top-down structure with five levels of management: headteacher, deputy headteacher, assistant headteacher, PT and APT. Middle tier posts were intended to reduce the load on headteachers and in this hierarchy PTs had specific delegated areas bounded by the internal top-down management: “Once determined, whole-school policies act more powerfully than ... external influences” (HMI 1984, 19). There is a separation between senior and middle management: the main decision-making body, the board of studies, comprised senior management (HMI 1984) which are described as “sometimes dauntingly small” (HMI 1984, 31) and so by 1988, with significant curriculum change in secondaries, a more consultative style constituted effective practice across the school and in departments: “Power-sharing and teamwork provide opportunities for departments and teachers to influence the shape of the school’s curriculum and thereby, learning and teaching throughout the school” (HMI 1988, 26).

The teachers’ contract, the *Teachers’ Agreement* (SE 2001, Annex D) recommended greater collegiality in schools. Reflecting wider academic and policy discussions of effectiveness, ideas about leadership, particularly distributive leadership, become important in other policies. Leadership is central to the *Ambitious Excellent Schools* improvement programme, which included a leadership agenda (SE 2005) to build capacity. Thus, effective leadership is “more than the actions, beliefs or qualities of a single individual and includes the contribution many people make to leadership”. (SE 2005, 2). Nevertheless, the role of headteacher is reified:

Increasingly, leadership is being viewed as a corporate concept which relates not only to the head of establishment but also to the combined impact of all those who have

responsibility for leading any aspect of provision for learners. The head is ultimately accountable in terms of the quality of education within the establishment and of the resulting progress made by learners. Leadership is therefore both individual and shared (HMIe 2007, 12).

### *Department Management to Middle Leadership*

With the addition of APT and PT (Guidance) posts alongside PT (Subject), the SED (1971) reports marks a point where department management becomes a layer in the school management structure. There are broad areas of responsibility for PT/APT (subject) posts; “subject supervision and development” and for PT/APT (Guidance) “personal, curricular and vocational guidance” (SED 1971, 41). These then evolve with four tasks for PT (Subject): curriculum management and maintenance of work standards, resources management, personnel management, administration; and six tasks for PT (Guidance) policy, resource management, personnel management, administration, discipline (HMI 1984). However, the viability of the extant structure was questioned: “the rank of principal teacher is proving to be much less flexible, mainly because it is tied by tradition to the management and by the Green Paper to fixed activities or systems such as guidance” (HMI 1984, 33). By 1988 (HMI 1988) some flexibility emerges in the three roles for PTs: class teacher, departmental management and contributing to the development of whole school policies on matters of assessment and discipline. In subsequent policy documents, the detailing of tasks for different PT posts gives way to a more generic specification: one job description for “Principal Teacher Curriculum/Pastoral” covers any PT posts including the newly instituted primary PT (SE, 2001). This middle tier is characterised as ‘team leadership’ (SE 2003). In the current professional standards, the *SfMLM* (GTCS 2012, 4) a generic set of professional actions cover the now extensive range of middle leadership posts where middle leadership is summarised:



Middle leaders in schools will have different areas of responsibility in addition to enhanced pedagogical skills, which may include curriculum leadership, departmental or faculty leadership, pastoral leadership, leadership in additional support provision, or leadership of school improvement priorities. They may have line management responsibility for a team of staff, lead a team delivering a specific area of provision, or a team involved in development activities. In taking their particular areas of responsibility forward, middle leaders will work and contribute to the school improvement agenda, particularly in building a culture of teaching and learning to address the needs of all learners, while also contributing to the development of capability more generally.

The overarching concern is on the development of learning and the contribution to the development of the whole school.

### *Defining Effectiveness*

Serial HMI reports deal with the issue of effective practice in middle leadership which has evolved from a spotlight on departmental management to leadership exercised across the school. While “most principal teachers administer their departments with reasonable efficiency” (HMI 1984, 26) several deficits in the PT role in managing department staff were identified. In *Effective Secondary Schools* (HMI 1988) effective PTs:

- “...encourage all members of the department to share ideas and learn from experience;
- ... are sensitive to the needs of individual teachers without losing sight of their overall responsibility for the quality of education provided for all pupils in the department... foster a team spirit;
- ... give careful attention to communication within their departments;
- ... recognise the need to monitor classroom practice;

- ... adjust his or her priorities in the light of policy changes or the identification of development needs so the pace of change is kept within bounds” (HMI 1988, 29-31).

Subsequently, discussions of effective leadership in quality assurance frameworks (HMI 2006, ES 2015) become less related to specific leadership roles, other than that of headteacher, reflecting the wider construct of leadership across schools. While *Leadership for Learning* (HMI 2007) makes no mention of PT or of team/middle leadership, the contract for PT and *SfMLM* (GTCS 2012) detail the effective practice of middle leaders. Effective practice has widened incrementally from effective department management to include “Whole school responsibilities” (SJNC 1988) for contributing to and implementing whole school policies and liaison. This strategic focus is strengthened in the PT job description in the *Teachers’ Agreement* (SE 2001, Annex B): “responsibility for the leadership, good management and strategic direction of colleagues” and is crystallised in the *SfMLM* (GTCS 2012, 4):

... middle leaders will work and contribute to the school improvement agenda, particularly in building a culture of teaching and learning to address the needs of all learners, while also contributing to the development of capability more generally.

### **Emerging Issues for Middle Leadership Professional Development**

Irvine and Brundrett (2017) argue middle leadership is not simply a teaching role with added responsibilities but is distinctive, requiring set of capabilities which teachers need opportunities to develop as they prepare for and move into middle leadership. Middle leadership has evolved in Scottish and Irish policy: initially conceptualised as sets of tasks to lightening the demands on headteachers/principals to the first level of a management hierarchy with bounded tasks to a conceptualisation of middle leadership as a critical element in the school’s development and improvement of learning. As yet ideas of the process ‘leading’ are not clear in policy constructions. In this next section we bring together the codes of meaning from each system

to identify key issues and relate these to research literature to identify issues for middle leadership professional development.

### *The distinctive role of middle leadership*

Bassett (2016) depicts the varied tasks middle leadership are expected to perform but despite the difficulties of definition, De Nobile (2018) argues for not constraining the concept. While in the Scottish system, the *SfMLM* (GTCS, 2012) detail the functions of middle leadership there is limited connection between the practice of middle leadership and other policy articulations of leadership. Recent conceptualisations of middle leadership in both systems are very broad: part of “individual and shared” (HMIe 2007, 12) or “other leaders” (DES, 2016) leading to variation (O’Donovan 2015). Indeed greater clarity is called for in recent Irish policy proposals to address “the variety of understandings of middle leadership, as it is commonly believed that middle leadership is primarily task-oriented and does not involve management or leadership of colleagues” (CSL 2017, 10). There is a danger that as further policy expectations are articulated, these simply become a list of tasks on a middle leadership remit. Therefore, in middle leadership development we need to look to sets of understandings and practices related to the central policy construction related to leadership and learning.

### *Leading Learning*

The continued existence of “very clear hierarchical chains of command in Irish schools” (Lárusdóttir and O’Connor 2017, 426) places constraints on middle leadership of learning. There are variations of practice in Irish schools from one “merely functional and fixed” to one “where coordinators are entrusted with leadership and engage with deep student learning and classroom practice” (O’Donovan 2015, 256). In Scottish secondary schools there are tensions around the augmented FH role in an extended leadership team and opportunities for building

communities of practice (Printy 2008) in faculties. The building of communities of practice point fundamentally to processes of leading rather than sets of tasks to be completed. Thus, middle leading of learning (Edwards-Grove et al. 2016) sets of practices come together around specific projects related to pedagogy and curriculum development, and professional learning. Edwards-Grove et al.'s (2016) study points to the importance of relational trust in leading learning and the middle leader's own expertise about learning. Therefore in middle leadership professional learning, there seems to be a need to balance skills of relationship building with understandings around learning (Flückiger et al. 2015).

#### *Informal and formal leadership roles*

Grootenboer (2018) argues that middle leaders are part of dispersed leadership in a school. However, in the policy constructions there is a blurring between middle leadership as distributed leadership and as an element in management hierarchies (Javadi et al.'s 2017). The issue of teacher leadership adds to this complexity. In Irish schools O'Donovan (2015, 257) notes the significance of 'volunteerism' in the secondary sector where in some schools, teachers take on additional duties or contribute to the extra-curricular life of the school. In Scottish schools the PT/FH post is the first promoted level with an increased salary for responsibilities. The boundaries between what promoted staff are contracted to take responsibility for and what teachers might be encouraged to lead is contested. Hirsh and Selgösson (2017, 16), reporting on a successful change programme where "organization, knowledge and skills were distributed over several people and incorporated into a structured mode" (16), point to the importance of blending formal and informal roles in a collaborative approach. Critically important in strengthening middle leadership is to underline the proximity to teaching and learning (Leithwood 2016). Rather than concentrate on the formal role of middle leaders, a focus for middle leadership development are "the socially situated practices"

(Grootenboer 2018, 372) – processes of leading - thereby forging connections to create the conditions for collaboration and improvement in pedagogic practice.

### *Connecting through the middle*

Girdwood (1989, 75) describes the Scottish PT of the 1980s being “at the communications cross roads within schools with senior management above, department staff below and other subject and guidance principal teachers to either side”. It is through this intermediary role (De Nobile 2016) that middle leaders build the conditions for effective learning through their own teaching and shaping the practice of other teachers (Grootenboer et al. 2017) but greater attention needs to be paid to the complex nature of this layer of leadership where middle leaders are not simply ‘conduits’ (Jarvis 2008, 27) of top-down policies and decisions. Busher and Harris (1999) propose that the middle leadership role has an inward and outward facing perspective, the inward perspective relates to a shared identity built around the common tasks team and expectations of shared loyalties and the outward perspective concerns expectations related school policy and the improvement agenda. These different perspectives have been regarded as a source of tension. However, Edward-Groves and Rönnerman (2013) argue that middle leaders are integral to both teaching and senior leadership and it is this that enables them to lead learning. Middle leadership provides important connections upwards, across and downwards (Grootenboer 2018) and so part of middle leadership professional development has to examine ways of building connections with senior leadership, other middle leaders and teacher colleagues.

### *Middle Leadership in Primary Schools*

There are differences between the development of middle leadership in Scottish and Irish primary schools. Whereas posts of responsibility have a longer history in Irish primaries, PT

posts are relatively new in Scottish primaries, intended to “bolster the management capacity of primary schools and provide career development opportunities” (McCormac 2012, 26). An aspiration for posts of responsibility in Irish primaries was for teachers to assume responsibility for the management of staff and their development (DES 1998, 1). Given the proportion of small primary schools in both systems, middle leadership is an important staging post (Sugrue 2009). However, middle leadership in the primary school is not simply about a career ladder but there are substantial issues about the legitimacy of this role and its relationship with other forms of leadership in a primary school. In the smaller management structures of primaries, middle and senior leadership can become conflated and the direct connection with classroom teaching is lost: where no formal middle leadership roles exist, Deputy Headteachers/ Principals may take on middle leadership tasks or where only middle leadership exists, a AP or PT becomes the next layer in the management hierarchy.

Structures are not the only barrier to building communities of practice through middle leading in primaries. Middle leadership can disturb isolationist professional cultures (O’Hanlon 2008) and so limiting teacher autonomy. Further, Hammersley-Fletcher and Strain (2011, 878) note a potential clash between “traditions of informal collaboration” and formal management posts intended to implement reforms, which also constrain the agency of teachers to generate change. If middle leadership in the primary sector is to thrive then part of professional development has to examine ways of middle leading by which their authority can be legitimised through their expertise as teachers and leaders (Edwards-Groves et al. 2016).

### *Conclusion*

There is increasing recognition in policy in Scotland and Ireland of the importance of middle leadership. However to realise these aspirations we need to underline the integrity of this layer

of leading rather than seeing this simply as a conduit for mandated policy or as a staging post to senior leadership. Grootenboer (2018, 15) argues that there is a “need for a focus in middle leading as fundamentally necessary for curriculum and pedagogic development in schools”. Middle leadership is an intermediary role and one which is multifaceted. There is a danger that in circumstances of high complexity middle leadership becomes reduced to a ready set of tasks. From the analysis of policy we see current aspirations are around the contribution of middle leadership to enhancing teaching and learning. However, these ambitions are set against historical backdrops where these roles were defined in management terms which continue to exist. Added to this “educational middle leading practice develops and unfolds differently in different school sites, in response to diverse conditions of those particular sites” (Grootenboer 2018, 51) where a distinctive shared language can be identified in each site. If the policy aspiration in Scottish and Irish education to harness the potential of middle leadership to bring about improvement in learning, then middle leadership professional learning has to move away from examining the role and tasks of middle leaders and the functions of middle leadership but instead to explore more explicitly the practice of middle leading – “the interconnected sayings, doings and relatings” that “hang together in projects such as leading professional development (Edwards-Grove et al. 2016, 375).

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