



Knowledge Centre  
for Education

University of Stavanger



# Mid-Level School Leaders: Work Tasks and Training Needs - A Systematic Review of Knowledge

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## Abstract

This systematic knowledge review is conducted on the initiative of the Norwegian Association of Local and Regional Authorities (KS) and is intended to be used as one of several knowledge bases in a framework for the development of mid-level managers and management teams in schools. The work in compiling this knowledge review has aimed to answer the following research questions: *What characterizes the working situation of mid-level leaders and what are their needs in terms of knowledge?* Five databases were searched for articles published in peer-reviewed journals during the period 2010-2017. The searches yielded 928 hits, and after a thorough quality and relevance assessment, 47 articles were read in full. Of these, 34 are included in the systematic knowledge review. The studies were conducted in 14 different countries.

In short, there is a broad consensus in the research that mid-level leaders are – and have long been – an untapped resource in schools. The researchers find that mid-level leaders often have a vague job description or none at all. Their job is determined primarily based on the headteacher's need for assistance or protection and the teachers' need for practical help and support. The job of mid-level leaders is made even more unclear and overloaded when work tasks are delegated ad hoc. These factors lead researchers to conclude that mid-level school management jobs of today neither prepare the jobholders for a position as headmaster nor enhance their competence. Historically, mid-level leaders have performed necessary but somewhat trivial work tasks related to order and conduct in school, pupil discipline, parental contact, simple administrative tasks, planning and supply work. In addition to assisting the headteacher, teachers and other employees with practical assignments, mid-level leaders have primarily been responsible for the students – in terms of discipline, guidance, help and consolation<sup>1</sup>. While it is important to maintain order in the school and ensure student discipline, researchers agree that job motivation can be negatively affected if these are the main - and in some cases, the only work tasks they perform. Therefore, they ask whether it might be better to have other staff members attend to the purely caretaker routines in schools and argue, furthermore, that mid-level leaders should be exempted from technical administrative tasks and instead apply their efforts to tasks that can contribute towards bolstering and developing the quality of education in the schools.

The 34 articles analysed in the systematic knowledge review show that the situation described here has remained static since the working situation of mid-level school personnel was first described some fifty years ago - a description that has remained essentially the same until the present time.

The knowledge review comprises five chapters. In Chapter 1, Introduction, we present prior research pertaining to mid-level managers. The first report on mid-level leaders' work situation, commissioned by the American School Leadership Association, was published in 1970.

<sup>1</sup>Kaplan, L. S., & Owings, W. A. (1999). Assistant Principals: The case for shared instructional leadership. *NASSP Bulletin*, 83(610), 80-94.

It provided a description of the mid-level managers' work situation, which later research reveals is still predominant today. In addition, the introduction corroborates that this is the situation for many Norwegian mid-level managers as well. The introduction concludes with a brief overview of the educational programme for school leaders/headteachers in Norway along with the principles of good school governance. In Chapter 2, Methodology, we present the systematic searches that have been conducted as well as the survey of articles, quality assessment of the studies and the determination of their relevance to the research question and the synthesis format selected for the knowledge summary.

In Chapter 3, the included articles are presented in four subchapters. The topic of the first subchapter is distributed leadership. The six articles reviewed here show that two views on *distributed leadership* characterize research that has been done. Whereas some regard the term as denoting a delegation of work assignments, others refer to it as a *practice* in which both the leader and the employees are engaged, and which involves diverting attention away from individual leaders' attributes and practices. Recent research asks how useful the distributed perspective on leadership has actually proved to be, beyond the fact that it has focused on the school as an organization. In the second subchapter, three studies are presented that have examined mid-level leaders' participation in learning communities (professional learning communities), and four studies that have looked at guidance practices such as mentoring and coaching. The studies show that mid-level leaders may experience "practice shock", that they benefit greatly from sharing experiences in groups and that they feel the need to have a mentor to rely on in a safe, informal and collegial atmosphere.

The third subchapter reviews 11 studies that have investigated mid-level leaders' work situation, work tasks and relationships with other stakeholders in the school. The studies reveal that mid-level leaders rarely have a clearly delimited area of responsibility and that they often accept tasks delegated ad hoc by the headteacher. Many researchers point out that this type of work situation is largely based on leadership competence and does not seem to be effective in recruiting candidates for the position of headteacher. There is also a broad consensus in the research that mid-level leaders should instead devote their efforts and competence to pedagogical work in the schools, including teacher follow-up, observation and assessment of classroom teaching, helping teachers implement reform initiatives etc. In any case, many mid-level school leaders, at least during the first few years, feel that they are more a teacher than a leader, while conversely, teachers feel that the leaders are no longer part of the teaching staff. This leads researchers to describe mid-level leaders as somewhat "squeezed in between", in a *sandwiched* position. Several studies find that teachers perceive the headteacher as the school's "real" leader and usually bypass the mid-level leader and go right to the headteacher if they deem the matter to be serious enough. There is also a tendency amongst headteachers to not regard mid-level leaders as potential future headteachers. This leads researchers to conclude that innovative thinking is needed in terms of the mid-level leadership function, for example, that mid-level leaders should be given clearly defined responsibilities.

Finally, Chapter 3 presents ten studies that have investigated the training needs of mid-level leaders, the courses they perceive as beneficial and their course preferences. Here, it is revealed that mid-level leaders represent a very disparate group. This is partly due to the big differences between schools with regard to size and geography, and partly to the fact that the individual headteacher determines the content of the mid-level leader's job, which gives the position a more personal rather than professional profile. In terms of expectations for courses and training, mid-level leaders prefer courses linked to the workplace and courses that provide practical advice on how best to do assigned tasks. Researchers find that school leaders tend to benefit most from training programmes that provide answers to technical issues, and that they are less enthusiastic about what they perceive as theory. They prefer a secure, experienced and readily accessible mentor whom they can consult when they need to do so. Individuals who become mid-level leaders normally have an education in teaching and experience as a teacher. This background, however, does not mean that they have necessarily developed a meta-perspective on the teaching profession - an overview they need to enable them to have professional conversations with teachers about their teaching and pedagogical practices.

In Chapter 4, studies are synthesized by cross analysis to reveal recurrent topics. A configured synthesis format is used and the articles are uploaded and analysed in NVivo 11 to identify key concepts. The synthesis shows that experience is the mid-level leaders' most important knowledge source. As teaching is increasingly referred to as a profession, the strong emphasis on experience as a source of knowledge is combined with the characteristics of professions. The synthesis reveals that research as a source of knowledge is absent in the mid-level leaders' knowledge base.

Chapter 5 summarizes, concludes and presents knowledge gaps in the research.

## 1.0 Introduction

This systematic knowledge review is conducted on the initiative of the Norwegian Association of Local and Regional Authorities (KS) and is intended to be used as one of several knowledge bases in a framework for the development of mid-level school leaders and management teams in schools. The knowledge review answers the following research question:

*What characterizes the work situation of mid-level school leaders and what are their needs in terms of knowledge?*

Whereas for a long time it was common to assume that good teachers would automatically make good school leaders, there is a growing realization that everyone destined to assume a job as a school leader, both headteachers and mid-level leaders, need other types of knowledge and competence in addition to teacher's training and experience in schools. Several countries have developed programmes combined with job training for newly hired school leaders<sup>2</sup>, and there is great diversity between the programmes offered. Some programmes are obligatory; others are voluntary; some are operated by universities or colleges, while others are run by local school authorities.

In 2006, Hargreaves and Fink<sup>3</sup> pointed out that research on school leadership has long regarded school leadership as synonymous with the headteacher. Although it may seem that the field of research concerned with mid-level leadership does not have a long tradition, some scholars have for many years been concerned with mid-level leaders and team leadership in schools, such as Busher & Harris<sup>4</sup>, Cranston et al.<sup>5</sup>, Cranston & Ehrich<sup>6</sup>, Day et al.<sup>7</sup>, Møller & Eggen<sup>8</sup>. Through a systematic search, the Knowledge Centre for Education discovered very many recent studies on mid-level school leaders.

In the effort to identify studies that may answer the research question formulated for the systematic review of knowledge, we mainly include articles that have examined the training needs of leaders who hold formal managerial positions and who report directly to the headteacher. Mid-level leaders are line manager employees<sup>9</sup> having formal managerial

responsibilities and duties and who are positioned between senior administrative leaders and the teachers. Some studies have included line managers and teachers who are subject-area or team leaders in surveys and interviews; in the presentation of each article, we account for the specific management groups covered by the study. In English-language research, the following designations are normally used to denote mid-level school managers: Assistant Principal, Vice Principal (USA), Department head (Canada), middle leader and/or middle manager (Australia, Singapore, New Zealand) and deputy headteacher (UK).

A mid-level school leader often works as both a teacher and a leader. Because many mid-level leaders are expected to follow up the teachers' work, many people point out how important the mid-level management group is for change and development in schools, as well as for pupils' learning, such as Margolis<sup>10</sup> and Walters<sup>11</sup>. Increasingly, leaders are expected to follow up the teachers in matters that can help strengthen school's pedagogical work. The term instructional leadership, according to Hallinger<sup>12</sup>, was institutionalized in the research under what is termed the "effective-schools" movement<sup>13</sup>. In this systematic review, instructional leadership is equivalent to educational, professional, or profession-specific<sup>14</sup> management. Some assume that because mid-level leaders are closer to teachers, they are also able to influence students' learning outcomes to a greater extent than can headteachers<sup>15</sup>. Therefore, they are assigned tasks related to the teachers' planning, teaching and assessment practices, and they are expected to influence the teacher's practices so that students' learning outcomes can improve. However, studies show that mid-level leaders are often assigned such tasks without training, with unclearly articulated expectations about what they are to achieve and with inadequate support from the school administration.

During recent decades, in the course of the trend towards standards, testing and accountability in schools, there has been a growing interest in identifying possible relationships between the quality of the school's leadership, teachers' teaching and students' learning outcomes. The assumption is that the closer you are to the pupil, the more directly you can influence the learner's learning outcomes. Parallel with this, emphasis is placed on the need for pedagogical leadership, which is about rooting the responsibility for the quality of the school's pedagogical efforts in the school's management and about ensuring this through the headteacher or the appointees assigned the task.

2. Schleicher, A. (2012) (Ed). *Preparing Teachers and Developing School Leaders for the 21st Century: Lessons from around the World*. OECD Publishing. <http://www.oecd.org/site/eduistp2012/49850576.pdf>.

3. Hargreaves, A. & Fink, D. (2006). *Sustainable leadership*. San Francisco: Jossey-Bass.

4. Busher, H., & Harris, A. (1999). Leadership of school subject areas: Tensions and dimensions of managing in the middle. *School Leadership & Management*, 19(3), 305-317.

5. Cranston, N., Tromans, C. & Reugebrink, M. (2004). Forgotten leaders: what do we know about the deputy principalship in secondary schools? *International journal of leadership in education: theory and practice*. 7(3), 225-242.

6. Cranston, N. & Ehrich, L. (2009). Senior management teams in schools: understanding their dynamics, enhancing their effectiveness. *Leading and managing*. 15(1), 14-25.

7. Day, C., Harris, A., & Hadfield, M. (2000). Leading schools in times of change. *McGraw-Hill Education (UK)*.

8. Møller, J. & Eggen, A. B. (2005). Team leadership in upper secondary education. *School leadership & management*. 25(4), 331-347.

9. Hammersley-Fletcher, L. & Kirkham, G. (2007). Middle leadership in primary school communities of practice: distribution or deception. *School Leadership and Management* 27(5), 423-435

10. Margolis, J. (2012). Hybrid teacher leaders and the new professional development ecology. *Professional development in education*. 38(2), 291-315.

11. Walters, D. (2012). One vision, many eyes: reflections on leadership and change. *International journal of leadership in education: theory and practice*. 15(1), 119-127.

12. Hallinger, P. (2005). Instructional Leadership and the School Principal: A Passing Fancy that Refuses to Fade Away. *Leadership and Policy in Schools* 4(3), 221-

13. Hallinger, P., & Murphy, J. (1985). Assessing the instructional leadership behavior of principals. *Elementary School Journal*, 86(2), 217-248.

14. Emstad, A. B. & Postholm, M. B. (2010). «Instructional leadership» - a good springboard for leading the school's learning platform. I R. A. Andreassen, E. J. Irgens & E. M. Skaalvik (Ed.), *Competent school management*. (pp. 183-195). Trondheim: Tapir Akademisk Forlag.

15. Lingard, B. et al (2003). *Leading learning: making hope practical in schools*. Maidenhead, UK: Open University Press.

In the USA, the first mid-level school leaders were employed in the 1930s, but it was not until 1970 that the general public became aware of the mid-level leadership function. In 1970, Austin and Brown<sup>16</sup>, commissioned by the National School Leadership Association, described mid-level management's work, responsibilities and tasks. They found that mid-level leaders had to relate to a very number of stakeholder groups and that, several times per day, they had to deal with difficult and stressful situations that arose. The main task of the mid-level leaders was to shield the headteacher from being bothered by the multitude of routine day-to-day, time-consuming disturbances. The report showed that the job was ineffective in enhancing competency or recruiting personnel for headteacher positions, along with the discovery that job satisfaction among mid-level leaders was low and that they invested little in the job. Gurley et al. (2015) points out that it is sensational how frequently and unequivocally research conducted after 1970 has confirmed these early findings. Again in the 1980s, researchers found<sup>17</sup> that mid-level leaders rarely participated in designing strategy and that they were primarily assigned trivial administrative tasks such as following up personnel and student matters. The researchers concluded that it was necessary to rethink the position. In the 1990s, the same concerns were recurrent; the job content was described as trivial, and it was pointed out that as long as mid-level leaders have this kind of work situation, structures will remain cemented. Thus, the status quo is maintained rather than initiating processes that can help renew educational practices in the schools. It was argued that mid-level leaders *should* be offered academically relevant courses in professional development and be part of the headteacher's leadership team, through the efforts of which students' learning outcomes can be enhanced<sup>18</sup>. An important issue in the research conducted in the 1990s was the very wide diversity in mid-level leaders' work assignments; one study<sup>19</sup> identified as many as 44 tasks they might be assigned. In a survey contrasting what mid-level leaders would like to do as opposed to what they actually do<sup>20</sup>, it was revealed that although most were of the opinion that they should work as profession-enhancers, they were actually largely in charge of pupil discipline and keeping the canteen tidy.

16. Austin, B. D., & Brown, H. L. (1970). Report of the assistant principalship, Vol. 3: The study of secondary school principals. Washington, DC: National Association of Secondary School Principals.

17. Fulton, O. K. (1987). Basic competencies of the assistant principal.

NASSP Bulletin, 71(501), 52-54.

Greenfield, W. (1985, November). Developing an instructional role for the assistant principal. *Education and Urban Society*, 18(1), 85-92.

Marshall, C., & Greenfield, W. (1987). The dynamics in the enculturation and the work in the assistant principalship. *Urban Education*, 22, 36-52. Miskel, C., & Cosgrove, D. (1985). Leader succession in school settings. *Review of Educational Research*, 55, 87-105.

Pellicer, L. O., Anderson, L. W., Keefe, J. W., Kelly, E. A., & McCleary, L. E. (1988). High school leaders and their schools, Vol. I: A national profile. Reston, VA: National Association of Secondary School Principals.

18. Marshall, C., & Mitchell, B. (1991). The assumptive worlds of fledgling administrators. *Education and Urban Society*, 23, 396-415. Marshall, C. (1992). Assistant principalship: An overview of the frustrations and rewards. *NASSP Bulletin*, 76, 88-94.

19. Bennett, N. (1995) *Managing professional teachers: Middle management in primary and secondary schools*. London: Paul Chapman (pp. 78-79).

20. Ianz, J. (1994). Redefining the roles and responsibilities of assistant principals. *Clearing House*, 67, 283-287.

In 2005, research on mid-level managers was described as relatively modest but growing<sup>21</sup>. The sparsity of research is a problem because a weak knowledge base makes it difficult to shed light on mid-level leaders' work situation and how the development programme for mid-level leaders should be designed. Proposals such as that mid-level leaders should spend time daily with teachers to discuss topics related to core values, curriculum and teaching as well as familiarize themselves with recent research on teaching practices<sup>22</sup> may be good, but do not necessarily find support in the research. One study from England<sup>23</sup> shows that mid-level managers do not get the training they need to attend to the growing number of tasks they are expected to accomplish. A Canadian survey<sup>24</sup> confirms this, pointing out that on-the-job training is not at all sufficient to prepare candidates for a leadership position in schools.

While Finland has had a separate programme for school leaders since the 1980s<sup>25</sup>, there have been few international initiatives to put leadership training for school administrators into a large-scale system. Although for decades research has pointed out that the mid-level school leaders' knowledge base is weak and that they need a dedicated training programme of their own<sup>26</sup>, there have been few training programmes for headteachers and even fewer for mid-level leaders. Some argue that mid-level school leaders, who are positioned just under the top level of the school's leadership structure, develop a very special knowledge base that is qualitatively different from the headteacher's<sup>27</sup>. The argument is that mid-level leaders know more about internal school factors and need skills that strengthen them in this position. They must create a productive partnership with the headteacher - while at the same time they need to develop good lateral relationships with the teachers, who are also their colleagues.

Schools have been described as complex and porous organizations, with complicated leadership matrices and vague job descriptions<sup>28</sup> making it difficult to document the impact of leadership on the school's performance<sup>29</sup>. At the same time, it is believed that the closer school employees are to the classroom, the more directly they are able to affect the student's learning outcomes. Pedagogical leadership has thus become tantamount to putting teaching and learning at the centre of the school's development efforts<sup>30</sup>.

21. Turner, C. (2005). *How to Run Your Department Successfully*. Continuum Publishing Group: London.

22. Weller, L. D., & Weller, S. J. (2002). *The assistant principal*. Thousand Oaks, CA: Corwin Press.

23. Harris, A., Muijs, D., & Crawford, M. (2003). *Deputy and assistant heads: Building leadership potential*. Nottingham, UK: National College for School Leadership.

24. Armstrong, D. E. (2009). *Administrative passages: Navigating the transition from teaching to administration*. Dordrecht, Netherlands: Springer-Verlag.

25. Uljens, M., & Nyman, C. (2013). Educational leadership in Finland or building a nation with bildung. In Moos, L. (ed.) *Transnational Influences on Values and Practices in Nordic Educational Leadership* (pp. 31-48). Springer Netherlands.

26. Hausman, C., Nebeker, A., & McCreary, J. (2001). The worklife of the assistant principal. *Journal of Educational Administration*, 40, 136-157. Pounder, D. G., & Merrill, R. J. (2001). Job desirability of the high school principalship: A job choice theory perspective. *Educational Administration Quarterly*, 37(27), 27-57.

Weller, L. D., & Weller, S. J. (2002). *The assistant principal*. Thousand Oaks, CA: Corwin Press.

27. Hartzell, G. N. (1993). The assistant principal: Neglected actor in practitioner leadership literature. *Journal of School Leadership*, 3, 707-723.

Hartzell, G. N. (1993). When you're not at the top. *The High School Magazine*, 1(2), 16-19.

28. Busher, H. & Harris, A. (2000) *Subject Leadership and School Improvement*. London: Paul Chapman Publishing

29. Hallinger, P., & Heck, R. H. (1996). Reassessing the principal's role in school effectiveness: A review of empirical research, 1980-1995. *Educational administration quarterly*, 32(1), 5-44.

30. Törnsén, M., & Ärlestig, H. (2012). *Struktur, Kultur, Ledarskap (Structure, Culture, Leadership)*. Lund: Studentlitteratur.

Researchers have long pointed out that local school authorities cannot leave the recruitment process to chance and the belief that informal socialization as a pathway into the job amounts to sufficient leadership training. Instead, they must develop structured and systematic leadership recruitment courses designed to increase mid-level leaders' skills as professional leaders<sup>31</sup>. There is a consensus that the training of mid-level leaders should take place in conjunction with the workplace and that development tasks, teamwork, ICT and strategy work should all be integrated, so that the mid-level leaders can be prepared for the headteacher job. The possibility of combining courses and on-the-job training is highlighted as beneficial, and it is recommended that courses for mid-level leaders be developed and arranged in partnership with educational institutions and should address topics such as change management, team management, digitization and expertise in teacher assessment. Currently, however, there are few empirical examples of well-functioning partnerships that support mid-level school leaders' professional development.

Recent research expresses a concern about recruitment to school leadership positions<sup>32</sup>. However, according to Gurley, Anast-May and Lee (2015), the challenges associated with recruitment are not universally shared, but are applicable to certain schools, areas or regions<sup>33</sup> that must do what they can to ensure that mid-level leaders have a desire to become headteacher and acquire the necessary knowledge and competence. A job situation dominated by many trivial responsibilities inspires a sense of low authority and does not bolster competence and confidence. Mid-level school leaders need both a career plan and help in developing personal leadership skills. They must learn the fundamentals of educational development work, know what characterizes good teaching methods, learn how to use modern technology as part of their job, and know how to build and maintain networks and strategically leverage available resources (Gurley, Anast-May and Lee, 2015, p. 216).

The ISSPP (International Successful School Principalship Project) study<sup>34</sup> identified four core dimensions in school management: 1) setting direction; 2) developing the staff; 3) redesigning the organization and 4) leading by demonstration. In addition, leaders must be able to conduct strategic problem solving, build trust, be visible in schools, ensure a good working environment and establish networks.

31. Oliver, R. (2005). Assistant principal professional growth and development: A matter that cannot be left to chance. *Educational Leadership and Administration*, 17, 89-100.

32. Gronn, P., & Rawlings-Sanaei, F. (2003). Principal recruitment in a climate of leadership disengagement. *Australian Journal of Education*, 47, 172-184.

Munoz, M. A., & Barber, H. M. (2011). Assistant principals in high-stakes accountability environments: The effects of job attributes and school. *Education, Assessment, Evaluation and Accountability*, 23, 131-143.

Thompson, K. (2010). How strategic is the school-based planning for leadership succession? *International Studies in Educational Administration*, 38(1), 98-113.

33. Pounder, D. G., Galbin, P., & Shepherd, P. (2003). An analysis of the US educational administrator shortage. *Australian Journal of Education*, 47(2), 133-145.

34. Leithwood, K. & Day, C. (2007). *Successful School Leadership in Times of Change*. Springer-Kluwer, Dordrecht

In Australia<sup>35</sup>, national standards are designed for the competences and skills of school leaders.

School leaders must have	Professional Practices School Leaders Must Master
Vision and values	Lead the school organization
Knowledge and understanding	Be able to lead developmental work, take the initiative for innovation and change
Personal qualities	Be able to develop themselves and others
Social and interpersonal skills	Lead the school's work in teaching and learning
	Be keenly involved and collaborate with the local community

The hallmarks of leadership in good schools are described<sup>36</sup>, and the OECD<sup>37</sup> have enshrined these principles for training programmes for school leaders:

- school leaders' area of responsibility and roles must be expanded
- school leaders must be more closely interconnected with professional practice, standards and frameworks
- theory and practice must be integrated
- Emphasis must be on pedagogical leadership and strategic school development in a system perspective
- management training must be adapted to the individual and specific school contexts
- training programmes must include coaching and mentoring
- enduring and supportive networks must be established between the participants in the programme
- the training programme must contain authentic problem-solving activities

Although the target group has been headteachers, many of the recommendations are relevant for mid-level managers.

35. Odhiambo, G. (2014). Squeezed? The role, purpose and development of middle leaders in schools. Paper presented at the joint AARE-NZARE 2014 Conference, Brisbane 2014. [https://www.aare.edu.au/data/2014\\_Conference/Full\\_papers/ODHIAMBO\\_14.pdf](https://www.aare.edu.au/data/2014_Conference/Full_papers/ODHIAMBO_14.pdf)

36. Møller, J. (2006). Nyere forskning om skoleledelse i gode skoler (Recent research on school leadership in good schools). *Norsk Pedagogisk Tidsskrift* nr. 2/2006, (pp. 96-108).

37. Schleicher, A. (2012) (Ed). *Preparing Teachers and Developing School Leaders for the 21st Century: Lessons from around the World*. OECD Publishing. <http://www.oecd.org/site/eduistp2012/49850576.pdf>.

## National School Leadership Educational Programmes

Since the 1970s, Norwegian school leaders have been offered various types of courses, local and regional<sup>38</sup>, and in the Report to the Storting No. 31 (2007-2008) Quality in School, a major initiative was heralded in the form of a national school leadership education for newly hired headteachers and administrators who lacked leadership education. The Norwegian Directorate for Education and Training was responsible for designing the offer, and after a national call for bids, four providers (BI, UiO, UiB and HiOA) were asked in 2009 to initiate the national school leader educational programme. One requirement was that the bidders were to collaborate with a consulting firm or independent consultants who had relevant experience and could contribute by coaching the participants. The following year, NTNU and AFF/NHH also became providers. The initiative was evaluated by NIFU/NTNU Social Research during the period 2010-2014. The evaluation is published in four sub-reports<sup>39</sup>, and shows that despite large differences in design and implementation of the courses, the participants are satisfied, and some very satisfied, with the courses that are offered. The degree of satisfaction varies slightly between providers. A depth analysis of the applications from two of the bidders shows fundamental differences in basic thinking<sup>40</sup>. A Nordic comparative study demonstrates that there may be deep disagreement over the characteristics of good school management<sup>41</sup>; the study asks what is accepted as a common knowledge base for school leaders. While Finland since the 1980s has had an obligatory school leadership training programme based on a master's degree in education, the situation in Norway is similar to that of Sweden and Denmark. The second phase of school leaders' educational programme (2015-2019) has also been evaluated, and a new report<sup>42</sup> confirms that there is still a wide diversity between bidders and a generally high level of satisfaction among participants.

38. Møller, J. (2016). Kvalifisering som skoleleder i en norsk kontekst: Et historisk tilbakeblikk og perspektiver på utdanning av skoleledere (Qualification as a school leader in a Norwegian context: A historical retrospective view and perspective on education of school leaders). *Acta Didactica Norge*, 10(4), 7-26.

39. Lysø, I. H., Stensaker, B., Aamodt P. O., & Mjøen, K. (2011). Ledet til ledelse: nasjonal rektorutdanning i grunn- og videregående skole i et internasjonalt perspektiv. (Led to Leadership: National leadership education for school principals in grades 1-13 in Norway in an international perspective). Oslo: NIFU; Lysø, I. H., Stensaker, B., Røthe, R. A., Olsen, M. S., og Solem, A. (2011). Ledet til lederutvikling: Nasjonal rektorutdanning i grunn- og videregående skole; forskjeller og likheter mellom de seks programtilbudene (Led to leadership development: National school leader development grades 1-13; differences and similarities between the six programmes offered). Oslo: NIFU/NTNU Social Research; Lysø, I. H., Stensaker, B., Federici, R. A., Solem, A., & Aamodt, P. O. (2013) Ledet til læring. Nasjonal rektorutdanning i grunn- og videregående skole; deltakernes vurdering av egen utvikling, Delrapport 3 fra Evaluering av den nasjonale rektorutdanningen. (Led to learning. National school leader education in grades 1-13; participants' assessment of their own development, Sub-report 3 from Evaluation of the National School Leaders Education). Oslo: NIFU; Lysø, I. H., Stensaker, B., Federici, R. A., Olsen, M. S., Solem, A., og Aamodt, P.O. (2014). Ledet til endring: (Led to change: National school leader education for grades 1-13; changes in elementary, lower and upper secondary school: Changes in schools, goal achievement and recommendations). Oslo: NIFU.

40. Møller, J., & Ottesen, E. (2011). Building leadership capacity: The Norwegian approach. In *International handbook of leadership for learning* (pp. 619-634). Springer Netherlands.

41. Uljens, M., Møller, J., Årlestig, H., & Frederiksen, L. F. (2013). The professionalisation of Nordic school leadership. In *Transnational Influences on Values and Practices in Nordic Educational Leadership* (pp. 133-157). Springer Netherlands.

42. Caspersen, J., Federici, R. A. & Røsdal, T. (2017). Evaluation of the National School Leaders' Education 2015-2019. Sub-report 1. NTNU Social Research

The Norwegian Association of Local and Regional Authorities (KS) has been concerned with how local school owners can make an effort to improve their school. In 2010, PWC submitted the report *Get closer!*<sup>43</sup>, which emphasizes the need for ambitious and visible school owners who, with dedication and insight, take responsibility for competence enhancement, basic knowledge, professional development and accountability of school leaders and teachers. In August 2013, KS, in cooperation with the Ministry of Education and Research, launched the programme *The Good School Owner*<sup>44</sup>, based on the report *Get Closer!* and other preparatory works<sup>45</sup>. In Norwegian lower and upper secondary school, there are over 8000 mid-level leaders, and in a study commissioned by KS in 2016, Ramboll finds<sup>46</sup> that this is a stable professional group with many different work tasks. Only 12% of them are considering a change in jobs, and 86% report being assigned some form of personnel responsibility, i.e. development and follow-up of employees, personnel calls and following up sickness absence and performance. Essentially, they have administrative and practical tasks, and they report that they spend much time providing services for teachers. On a list of seventeen tasks, the majority of the mid-level leaders state that they are engaged in fourteen of them. Being a professional *sparring partner* with teachers is the most prevalent task shared by mid-level school leaders. This applies to the greatest extent in primary and lower secondary school, where mid-level school leaders report having development-oriented conversations with teachers and assistants or providing guidance in the field of school law. However, some teachers prefer to have the headteacher as a sparring partner (p. 58). Ramboll does not go into further detail about what being a sparring partner entails, or what knowledge base mid-level leaders use in this work.

When designing courses for mid-level leaders, there is much to be learned from the structure of the national school leaders' education. First, cooperation between an educational institution and a consulting firm (or someone who has experience in management coaching) is a prerequisite. Second, the course must be designed so that much of the learning will take place in the workplace, an arrangement that has consequences for the way tasks are designed and used during the gatherings. Third, a network must be established that the participants actively use between gatherings and after the course is over.

43. <http://www.ks.no/globalassets/vedlegg-til-hvert-fagomrader/utdanning-og-oppvekst/skole/084013rapport-hvordan-lykkes-som-skoleeier.pdf>

44. [http://www.ks.no/globalassets/vedlegg-til-hvert-fagomrader/utdanning-og-oppvekst/skole/den-gode-skoleeier/den\\_gode\\_skole\\_eier\\_til\\_internet2\\_24092013-1.pdf](http://www.ks.no/globalassets/vedlegg-til-hvert-fagomrader/utdanning-og-oppvekst/skole/den-gode-skoleeier/den_gode_skole_eier_til_internet2_24092013-1.pdf)

45. Jøsendal, J. S., Langfeldt, G. and Roald, K. (Ed.) (2012). *Skoleeier som kvalitetsutvikler - Hvordan kommuner og fylkeskommuner skaper gode læringsresultater* (The school owner as a quality developer - How municipalities and county councils create good learning outcomes). Oslo: Kommuneforlaget.

46. <http://www.ks.no/globalassets/blokker-til-hvert-fagomrade/utvikling/fou/mellomledelse-i-skolen---rapport-med-logo.pdf>



## Summary

Historically, mid-level school leaders have mainly had work assignments related to pupil discipline and practical tasks and have been considered an underutilized resource in schools. The researchers find that mid-level leaders often still lack a job description or have a vague one. Their assignments are delegated to them by the headteacher, and their job is determined primarily by the needs of other staff members in the school. They have mostly lessened the burden on the headteacher, helped teachers with practical tasks and been responsible for students<sup>47</sup>. It is sometimes the case that mid-level managers also have work tasks related to teaching in the school, such as responsibility for teachers' professional development, or observing teachers' classroom teaching and giving feedback on this. In the course of time, mid-level school leaders have been referred to as "the forgotten man"<sup>48</sup> and an "overlooked educational resource"<sup>49</sup> and they have often been linked with the three B's in school: Books, Behinds and Buses<sup>50</sup>. While everyone agrees that it is necessary to maintain pupil discipline in schools, this is increasingly cited as having a potential negative effect on job motivation if it is the most important task performed by school leaders, and some ask whether this might be work that could be done by personnel other than those who hold leadership positions.

Mid-level school leaders feel, at any rate during the first few years, more like teachers than leaders, but they frequently feel that they are no longer regarded as one of the teachers. The competence they have is a product of having been teachers, but this does not necessarily mean that they have developed a meta perspective on the teaching profession - which is a prerequisite to be able to speak professionally with teachers *about* the job they do. The OECD has pointed out that a background as a teacher does not in itself yield the necessary skills for a job as a school leader<sup>51</sup>.

47. Kaplan, L. S., & Owings, W. A. (1999). Assistant Principals: The case for shared instructional leadership. *NASSP Bulletin*, 83(610), 80-94.

48. Glanz, J. (1994, p. 283). Redefining the roles and responsibilities of assistant principals. *Clearing House*, 67, 283-287.

49. Harvey, M. J. (1994, p. 17). The deputy principalship: Retrospect and prospect. *The International Journal of Educational Management* 8(3), 15-25.

50. Good, R. (2008, p. 46). Sharing the secrets. *Principal Leadership* 8(8), 46-50.

51. OECD (2008). *Improving School Leadership. Volume 1: Policy and Practice*. Paris: OECD  
OECD (2012). *Preparing Teachers and Developing School Leaders for the 21st Century: Lessons from around the World*. (Ed. Schleicher, A.) Paris: OECD Publishing.

## 2.0 Methodology

This systematic knowledge review is a rapid review of knowledge (Rapid Evidence Assessment<sup>52</sup> or Rapid Review<sup>53</sup>), a format designed to perform knowledge summaries quickly and ensure the quality requirements of the systematic knowledge review format. A rapid review makes some delimitations but otherwise follows the same procedures as any systematic knowledge review, and it has the same requirements for systematics and transparency<sup>54</sup>. The following three delimitations have been made in this knowledge review: **1)** articles published in peer-reviewed journals are included; **2)** The database searches are limited to studies published after 1 January 2010; and **3)** languages are limited to articles published in English, Norwegian, Swedish and Danish. The knowledge review answers the following research question:

*What characterizes the work situation of mid-level school leaders and what are their needs in terms of knowledge?*

### 2.1 Search Strategy and Reference Management

Having identified key concepts in the research on mid-level school leaders, a string of keywords was developed and several sample searches were conducted in electronic databases. The electronic searches were carried out on 2 November 2016 in seven electronic databases: Education Collection, Applied Social Sciences Index and Abstracts (ASSIA), International Bibliography of the Social Sciences (IBSS), Education Database, Education Resources Information Center (ERIC), Psycinfo and Scopus. Searches were conducted with free text tags in the title and summary and resulted in 926 hits. Appendix 1 shows the search string with the syntax used in ProQuest. In addition, in January 2017, manual searches were conducted and identified two additional articles with potential relevance. The included articles therefore cover the publishing period 2010 to 2017.

All references were imported into the Software EPPI-reviewer 4, which is developed by the EPPI Centre at University College London to handle large amounts of data. The process of sorting the articles and preparing data for synthesis occurs in three stages according to predetermined criteria. At the first stage, the articles are assessed based on title and summary, and in the

52. Thomas, J., Newman, M. and Oliver, S. (2013): Rapid evidence assessment of research to inform social policy: taking stock and moving forward, *Evidence & Policy* vol. 9 No. 1, pp 5-27

Varker, T., Forbes, D., Dell, L., Weston, A., Merlin, T., Hodson, S. and O'Donnell, M. (2015): Rapid evidence assessment: Increasing the transparency of an emerging methodology. *Journal of Evaluation in Clinical Practice*.

53. Khangura, S., Konnyu, K., Cushman, R., Grimshaw, J. and Moher, D. (2012): Evidence summaries and the evolution of a rapid review approach, *Systematic Reviews*, 1-10.

Featherstone, R. M., Michelle, D. M., Guise, J-M., Mitchell, M.D., Paynter, R. A., Robinson, K. A., Umscheid, C. A., and Hartling, L. (2015): Advancing knowledge of rapid reviews: An analysis of results, conclusions and recommendations from published review articles examining rapid reviews. *Systematic reviews* 4:50.

54. See Lillejord et al. (2015) for a more complete description of a brief overview of knowledge.

second stage based on full text. At the third stage of the process, data from the studies are described and made ready for synthesis. Figure 1 illustrates the sorting process during the first two stages of this knowledge review:

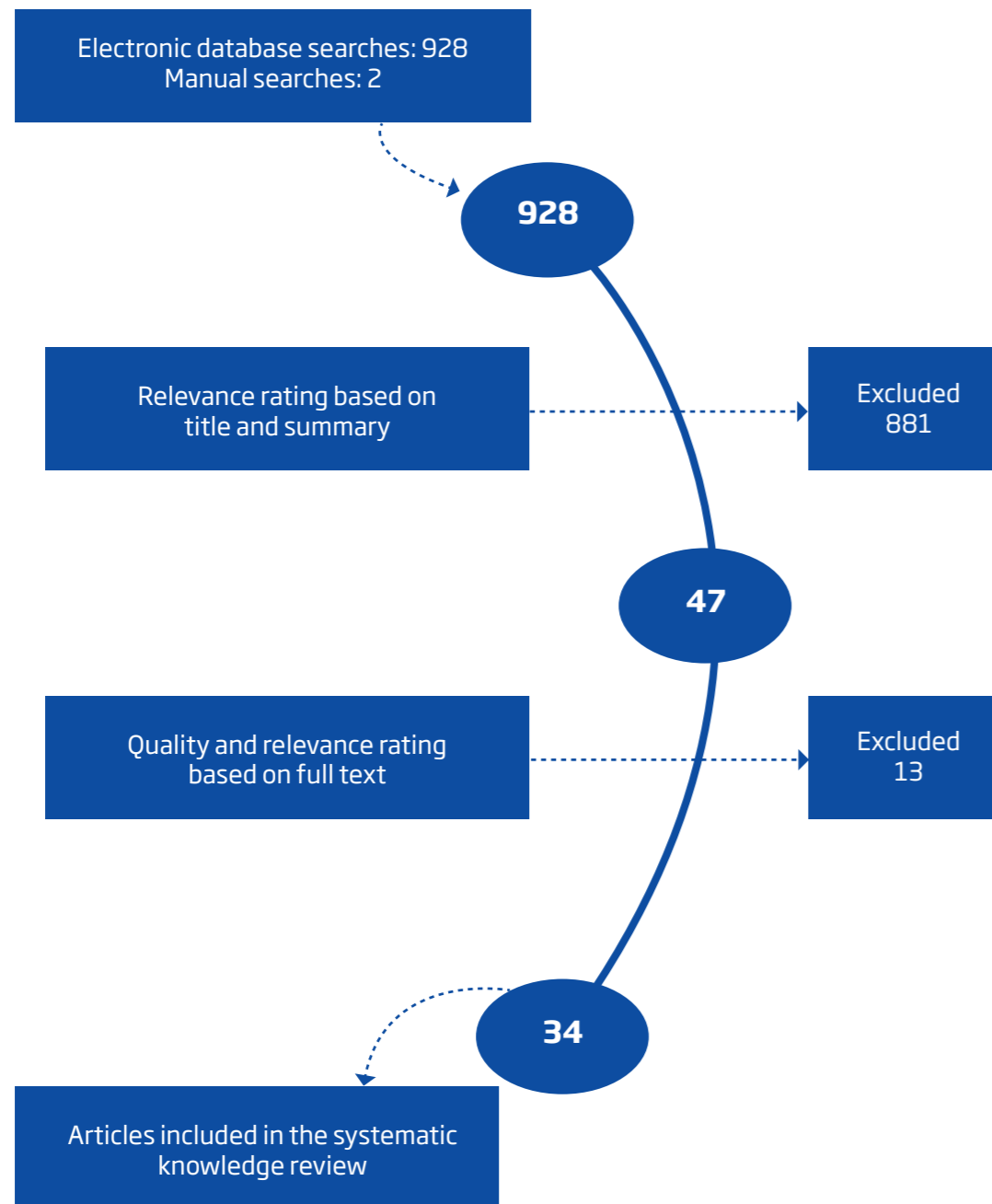


Figure 1. Overview of the sorting process during the knowledge review

In Stage 1, studies were sorted and the title and summary were rated for relevance. Table 1 shows a list of the inclusion criteria used in the sorting process. Following relevance assessment at Stage 1, 47 studies remained that had potential relevance to the knowledge review.

INCLUSION CRITERION	EXPLANATION
<b>Topic</b>	Study should deal with mid-level leaders in lower secondary or upper secondary school
<b>Context</b>	The study must have examined mid-level leaders' work situation, knowledge and training needs
<b>Type of publication</b>	The article must be published in a peer-reviewed journal after 1 January 2010
<b>Language</b>	The article must be published in English, Norwegian, Swedish or Danish.

Table 1. Inclusion criteria

At Stage 2, the 47 studies with potential relevance were read in full text. Two researchers assessed, independently, the quality and relevance of the studies. Table 2 shows an overview of the quality criteria according to which the studies are assessed. The studies are assigned a high, medium or low score. After Stage 2, 34 studies remained and are included in the systematic knowledge review.

QUALITY CRITERIA	VALUE
<ul style="list-style-type: none"> <li>Validity</li> <li>Reliability</li> <li>Generalization</li> <li>Is the research question clearly formulated?</li> <li>Are the research method and the research design specified?</li> <li>Is there a match between research questions and findings?</li> </ul>	<p><b>High:</b> Explicit and detailed description of method, data collection, analysis and results; the interpretations are clearly supported in the findings.</p> <p><b>Medium:</b> Satisfactory description of method, data collection, analysis and results; the interpretations are partially supported in the findings.</p> <p><b>Low:</b> Weak description of method, data collection, analysis and results; the interpretations are weakly supported in the findings.</p>

Table 2. Quality criteria

At the third stage, the included articles are read as a preparation for synthesizing. First, the material is mapped through table lists that show the methods used in the research and the countries in which the studies are conducted. Then several researchers read the articles in full text and each study is re-described, i.e. a short version of the study is written so as to make apparent how it can illuminate the knowledge review's research questions.

## 2.2 Mapping and Synthesis Format

The survey of the included studies shows that the articles are from 14 different countries and were published in the period 2010 to 2017. When an article is written by co-authors from different countries, this is highlighted in the presentation of the article. The location where the study was conducted is also indicated.

COUNTRY	QUANTITY
Australia	3
Belgium	1
Canada	4
England	5
Ireland	1
Israel	2
Italy	1
China	2
Cyprus	1
Malaysia	1
New Zealand	1
Norway	1
Singapore	1
USA	10
<b>SUM</b>	<b>34</b>

Table 3. Mapping of countries

Moreover, the article survey shows that 5 studies have used quantitative methods, 21 studies have used qualitative methods, 5 studies are based on both qualitative and quantitative methods, one article is theoretical and 2 studies are reviews. 18 articles are of high quality, 15 are of medium quality and 1 is of low quality.

After a survey of topics in the research, the 34 included articles were categorized as follows: 1) Distributed leadership, 2) Learning community, mentoring and coaching, 4) About mid-level leaders and 5) Mid-level leaders' training needs.

CATEGORY	ARTICLES
<b>Distributed leadership</b>	6 articles (Barnett & McCormick, 2012; DeVos, Tuytens & Hulpia, 2014; Hammersley-Fletcher & Strain, 2011; Kelly & Dikkers, 2016; O'Donovan, 2015 and Petrides, Jimes & Karaglani, 2014)
<b>Learning communities, mentoring and coaching</b>	7 articles (Bouchamma & Michaud, 2011 & 2014; Friedman, 2011; Marshall & Davidson, 2016; Lochmiller & Karnopp, 2016; Liang & Augustine-Shaw, 2016; and Service, Dalglic & Thornton, 2016)
<b>Mid-level managers duties and position in schools</b>	11 articles (Abrahamsen, 2017; Gurr & Grysdale, 2013; Irvine & Browning, 2016; Kaparou & Bush, 2015; Koh et al. 2011; Leithwood, 2016; McCauley-Smith m fl. 2013; Mulholland, McKinley & Sproule, 2017; Muños & Barber, 2011; Ng, 2015 and Paranosic & Riveros, 2017)
<b>Mid-level managers' training needs</b>	10 articles (Abebe et al., 2010; Arar, 2014; Barnett, Shoho & Oleszewski, 2012; Gurley, Anast-May & Lee, 2015; NG & Chan, 2014; Nicolaidou & Petridou, 2011; Oleszewski, Shoho & Barnett, 2012; Pirola, 2015; Thorpe & Bennett-Powell, 2014 and Wilson & Xue, 2013)

### Configurative Synthesising Of Studies

To synthesize means to bring together parts, which are basically discrete, into a coherent whole to shed new light on what is described. Because the articles in this knowledge review are largely heterogeneous and because both qualitative and quantitative studies are included, a configuring synthesis (Gough m fl., 2017) was carried out<sup>55</sup>. Configuration is an approach to synthesis comparable to creating a mosaic or completing a puzzle; in this case, the findings in the articles are consolidated so as to shed light on different aspects of a scenario. The overall intention of configurative synthesis is to take advantage of its ability to *enlighten*.

55. Gough, D., Oliver, S., & Thomas, J. (Eds.). (2017). An introduction to systematic reviews. Sage.

The data sources in systematic reviews are the included articles, and in this review, the entire article is deemed to be data (Gough et al., 2017). In other words, the context and background of the study are relevant to synthesis work in addition to the findings in the studies. Because the process is data-driven (that is, the included articles as data), the configuring synthesis is thereby developed from the bottom up (Sandelowski et al., 2012)<sup>56</sup>. To acquire a new understanding of the phenomenon, rooted in data, a framework and identified key concepts have also been developed.

The synthesis work itself is an iterative process, where several researchers work together and follow some major steps. The research question in this knowledge review is twofold, meaning that the findings related to the work situation of mid-level school leaders must be mapped first, before the second part of the research question dealing with mid-level leaders' knowledge needs can be answered. The studies are translated and interpreted through the preparation of re-descriptions, the purpose of which is to bring out the articles' *meaningful content*, a form of interpretation and translation that Noblit & Hare (1988) call *idio translationmatics*<sup>57</sup>. When short versions of all included articles have been prepared, these are cross-analysed to develop a *framework* for the analysis. This is the second stage in the synthesis work.

The framework for synthesis has a structuring function in the conforming synthesis by helping to unfold what research reveals about mid-level leaders' job situation and systematically opening up for analysis of knowledge needs, see Figure 2, in Chapter 4. The development of the framework then forms the starting point for the third step in synthesis: *identification of key concepts*. Key concepts are the concepts from the articles used to analyse characteristics of the job situation of mid-level leaders and their knowledge needs. To identify key concepts, the NVivo 11 software was used (see Appendix 2), and the analysis revealed that *while experience* is referred to as a central and important source of knowledge for mid-level school leaders (in 27 out of 34 articles), mid-level leaders do not consider research as a potential source of knowledge. Because the analysis revealed that a central piece of the puzzle was missing, a reconfiguration was implemented by bringing in theory to replace the missing piece of the puzzle during the fourth stage of the synthesis work. This is presented in Chapter 4, Synthesis.

56. Sandelowski, M., Voils, C. I., Leeman, J., & Crandell, J. L. (2012). Mapping the mixed methods-mixed research synthesis terrain. *Journal of mixed methods research*, 6(4), 317-331.

57. Noblit, G.W. & Hare, R.D. (1988) *Meta-ethnography: Synthesizing qualitative studies*. Sage's university paper series on Qualitative research methods volume 11, California: Sage publications

### 3.0 About Mid-Level Leaders, Mid-Level Leadership and Training Needs

After Stage 3, 34 studies remained and are included in the systematic knowledge review. The chapter begins with the theme of distributed leadership, which shifts attention from *leader* to *leadership*, thereby drawing attention to the sum of interactions in the school organization. Research on leadership as distributed practices help to enhance our understanding of the school as an organization and is useful whether one understands distributed leadership as a delegation of tasks or as relational practices spread throughout the school organization. Moreover, Chapter 3 presents studies that have examined the benefits leaders may derive from participating in learning communities and from mentoring and coaching. Several of the studies find that school leaders appreciate having an experienced and supportive mentor. In the second half of the chapter, newer articles are presented that describe the work situation of mid-level school leaders. These articles corroborate the impression from the introduction that research, since the 1970s, has found that mid-level leaders have tasks that neither build competence nor are attractive in the recruitment of candidates for headteacher positions. At the same time, schools have an urgent and growing need for leaders who can contribute towards innovation in education, facilitation of development work and implementation of reforms. The chapter ends with articles that have examined the programme for mid-level leaders or have asked what mid-level leaders need to know and could do a good job.

#### 3.1 Distributed Leadership

Presented here are 6 articles (Barnett & McCormick, 2012; DeVos, Tuytens & Hulpia, 2014; Hammersley-Fletcher & Strain, 2011; Kelly & Dikkers, 2016; O'Donovan, 2015 and Petrides, James & Karaglani, 2014) who were identified through systematic searches and who investigated various forms of distributed leadership practices. The six articles are representative of the diversity of this current of research, and the subchapter has an introductory overview of the development of the term distributed leadership.

##### 3.1.1 Background

The designation *distributed leadership* was developed for purely analytical reasons to shift attention from the individual leader of the organization to a conceptualization of leadership as a practice exercised through cooperation on the diversity of day-to-day activities in the organization, both vertically and horizontally<sup>58</sup>. Spillane, Halverson and Diamond<sup>59</sup> argue that, instead of understanding leadership as formal roles and positions, one should view it as the sum of interactions within the organization. Leadership is thereby understood as social

58. Gronn, P. (2000). Distributed properties: A new architecture for leadership. *Educational Management & Administration*. 28. 317-338.

59. Spillane, J. P., Halverson, R., & Diamond, J. B. (2004). Towards a theory of leadership practice: A distributed perspective. *Journal of curriculum studies*, 36(1), 3-34.

practices that virtually *extend beyond* and encompass the holistic effort in leading a school by including more than the one formal leader and those who exercise leadership functions. The concept of distributed leadership means that leadership actions can be considered *relational*, by including both formal and informal leaders in the governance of the school<sup>60</sup>. How leadership initiatives are formulated and presented, and how employees receive and respond to them is of great importance to the result. In other words, distributed management can be understood as participatory and cooperative decision-making processes involving teachers, parents and other stakeholders<sup>61</sup> as well as students<sup>62</sup>. In the perspective of distributed leadership, what managers do and how they take action is still very important, but attention is also focused on how the organization reacts, responds to and follows up leadership initiatives, as well as how school leaders follow up initiatives taken by staff, students and parents.

Interest in distributed leadership began in the 1990s, a period characterised by rapid technological restructuring, mobility and globalization, adoption of standard and performance-based education reforms and increased demands for accountability<sup>63</sup> and new laws and regulations<sup>64</sup>. School leadership was placed high on the political agenda, with an interest in team leadership<sup>65</sup> and how leadership can contribute to continued renewal of the school organization<sup>66</sup>.

To distribute means to hand out, *apportion*, and Robinson et al.<sup>67</sup> identify two main perspectives in the research on distributed leadership. One of these perspectives sees distributed leadership as task distribution; in the second, the possibility of influencing decision-making processes is spread out within the organization. The first perspective is practical, and the second is about power and influence. Therefore, some use the term distributed leadership almost synonymously with delegation, meaning that distributed leadership is the same as the leader's formal authority in terms of power and authority being transferred to others in the organization<sup>68</sup>. In this sense, distributed leadership is often used in a purely technical way to describe the reorganization of school governance - from one school

leader to a leadership team. Researchers in this tradition point out that because schools have been given many new tasks and encounter ever greater expectations, team organization of school governance will lessen the burden on the headteacher and will better be able to support teachers in all the new tasks they are expected to perform<sup>69</sup>.

Harris<sup>70</sup> states that distributed leadership is widespread in organisations with flatter organizational structures, where management *practice* is more important than the role of leader, and Wahlström et al. (2010)<sup>71</sup> find three forms of dispersed leadership: **collective** (Steiner School), **common** (team management) and **distributed**. However, understanding leadership as distributed practices does *not* mean, as Alma Harris stressed<sup>72</sup>, that "everyone" is a leader or that the formal leaders have become redundant. On the contrary, distributed leadership in the school will not work without the active and wholehearted support of those in formal leadership positions. The headteacher, for example, through negotiations with the employees, has a particular responsibility to inculcate mutual trust in the organization. Therefore, formal and informal leadership can be understood as different but necessary constituents of leadership in the organization. The perspective of school leadership as distributed practices has an impact on the headteacher's traditional position of power and authority and necessitates seeing leadership less as a status or position and more as interactions<sup>73</sup>.

In a historical perspective, interest in distributed leadership can be understood as a result of developments in which organizations are not considered static bodies but as dynamic and learning networks. At the same time, leadership is no longer linked with one individual, but is about getting different stakeholders in the organization to collaborate towards achieving common goals. Leadership, then, is understood as a practice that grows through dynamic and changing choices of actions and patterns of actions<sup>74</sup>. A theoretical basis for distributed leadership is distributed cognition<sup>75</sup>, that is, the theory that cognitive processes take place not only in the minds of each person, but also socially, between people interacting in different contexts. A distributed view of leadership also relates to activity theory<sup>76</sup>, which is affiliated

60. Fuglestad, O. L. & Lillejord, S. (Ed.) (1997): Pedagogisk ledelse - et relasjonelt perspektiv (Pedagogical leadership - a relational perspective). Bergen: Fagbokforlaget.

61. Heck, R. H., & Hallinger, P. (2009). Assessing the contribution of distributed leadership to school improvement and growth in math achievement. *American Educational Research Journal*, 46(3), 659-689.

62. Seashore Louis, K., Dretzke, B., & Wahlstrom, K. (2010). How does leadership affect student achievement? Results from a national US survey. *School effectiveness and school improvement*, 21(3), 315-336.

63. Møller, J. (2009). School leadership in an age of accountability: Tensions between managerial and professional accountability. *Journal of Educational Change*, 10(1), 37-46.

64. Møller, J. (2009). Approaches to School Leadership in Scandinavia. *Journal of Educational Administration and History* 41(2), p.165-177

65. Møller, J., & Eggen, A. B. (2005). Team leadership in upper secondary education. *School Leadership and Management*, 25(4), 331-347

66. Cohen-Vogel, L., Cannata, M., Rutledge, S. A., & Socol, A. R. (2016). A Model of Continuous Improvement in High Schools: A Process for Research, Innovation Design, Implementation, and Scale. *Teachers College Record*, 118(13), n13.

67. Robinson, V. M. (2008). Forging the links between distributed leadership and educational outcomes. *Journal of educational administration*, 46(2), 241-256.

68. Harris, A. (2008). *Distributed School Leadership. Developing tomorrow's leaders*. N.Y.: Routledge

69. Leithwood, K., Harris, A., & Hopkins, D. (2008). Seven strong claims about successful school leadership. *School leadership and management*, 28(1), 27-42.

70. Harris, A. (2009). *Distributed Leadership: evidence, issues and future directions*. Monograph no 44, Australian Council for Educational Leaders, Sydney

71. Wahlstrom, K. L., Louise, K. S., Leithwood, K. and Anderson, S. E. (2010). *Learning from Leadership Project: Investigating the Links to Improved Student Learning*. The Wallace Foundation, New York, NY.

72. Harris, A. (2013). Distributed leadership: Friend or foe? *Educational Management Administration & Leadership*, 41(5), 545-554.

73. Harris, A. (2011). Distributed leadership: Implications for the role of the principal. *Journal of Management Development*, 31(1), 7-17.

74. Spillane, J. P. (2006). *Distributed leadership*. San Francisco, CA: Jossey-Bass.

75. Salomon, G. (1997). *Distributed cognitions: Psychological and educational considerations*. Cambridge University Press.

76. Engeström, Y., Miettinen, R., & Punamäki, R. L. (1999). *Perspectives on activity theory*. Cambridge University Press.

with sociocultural learning theory, in which learning is considered a practice and assumes that people learn when working with knowledge in social settings<sup>77</sup>. Distributed leadership can thereby be understood as systemic activities that are able to support learning in organizations and organizational development.

### Summary

The term distributed leadership has emerged through several concurrent developmental traits and research in several disciplines independently. It is used in different ways and serves many different purposes. Scientists, practitioners and designers of education policy are keenly interested in this perspective. However, many of the researchers take their perspective on distributed leadership for granted, referring only to part of the research in the field, and they do not concern themselves with the fact that there are different understandings of the term. There are many articles discussing the pros and cons of the perspective, but few empirical studies in the field. Some researchers have therefore questioned how useful the term distributed leadership has actually proved to be when the objective is to understand school leadership. For example, the perspective on distributed leadership as a delegation of tasks may have the effect of forcing people who have neither the ambition nor the necessary leadership skills into positions where they are expected to exercise leadership (Gurr and Drysdale 2013, p. 62).

### 3.1.2 Presentation of articles

The six articles presented here are reports from studies conducted in Australia, Europe and the USA. Several of the researchers point out that there are few empirical studies on the roles, practices and perceptions of leadership and that they intend to contribute such knowledge.

AUTHORS	COUNTRY	HAVE INVESTIGATED
Barnett & McCormick (2012)	Australia	The process behind reorganization to team leadership in upper secondary school
DeVos, Tuytens & Hulpia (2014)	Belgium	Relationship between the headteachers' leadership style and the teachers' feeling of duty to the school organization
Hammersley-Fletcher & Strain (2011)	England	How mid-level leaders' perception of the job has changed over a period of fifteen years
Kelley & Dikkers (2016)	USA	The relationship between management tasks and organizational routines - an analytical perspective on distributed management
O'Donovan (2015)	Ireland	Challenges and opportunities to develop distributed leadership practices in upper secondary schools
Petrides, Jimes & Karaglani (2014)	USA	How mid-level leaders in schools with distributed leadership perceive their job

Education policy after the 1990s has exacerbated the complexity of the education sector, and it has become necessary to rethink the organization of management in the schools. Some schools have chosen to organize the management echelon as a team, and **Barnett & McCormick** (2012) have examined the work of three leadership teams in Sydney (Australia). The schools that participated in the survey had reorganized management (from one headteacher to a leadership team), and data were collected in interviews. In the new organizational model,

77. Lillejord, S. & Dysthe, O. (2008). Productive Learning Practice - a theoretical discussion based on two cases. *Journal of Education and Work* 21(1), 75-89.

the headteacher served as team leader, and the mid-level leaders were assigned clear-cut areas of responsibility. The study provides insight into how collective leadership can synchronize very complex leadership tasks and shows that it is difficult to coordinate collective leadership. The headteachers formulated goals, determined direction and explained why it was important to act in concert and in specified ways. They supported team development and handled leadership tasks flexibly, while at the same time ensuring effective work processes. The social aspects of teamwork were very important, and trust was important in getting all members of the leadership team to participate actively and to share information. The study also finds that organization in a team enhanced the team's leadership skills and strengthened the headteacher's function. The conclusion is that if distributed leadership is to succeed, the management tasks must be assigned to those who have the requisite knowledge and expertise. Besides this, someone has to coordinate the work. Flexible coordination assumes that the headteacher is collective-oriented, has good leadership skills and can coordinate and develop the team's overall expertise.

**Devos, Tuytens & Hulpia (2014)** have examined the relationship between the school leader's type of leadership and the teachers' involvement in organizational issues; they asked what impact distributed leadership has on teachers' engagement. The point of departure for the study is that we know little about which individual components of distributed leadership seem to have a positive effect in schools. The researchers presume - with support in previous research - that teachers become more positive about taking responsibility for the school as an organization when they have a supportive headteacher. Furthermore, they assume that distributed leadership includes formal leadership functions (headteachers and mid-level school leaders), as well as leadership functions that are exercised by teachers. Moreover, they have examined the importance of mid-level leaders' work, what it means when teachers actively participate in the school's decision-making processes and how cooperation takes place in the management teams. Direct and indirect factors have been measured between how supportive the headteacher is and how committed teachers are in the school's organizational relationships. Data from 1,495 teachers were collected in 46 upper secondary schools, and using structural equation modelling (SEM) they find that the effect of the school leader's leadership style on teachers' organizational behaviour is mediated by what mid-level leaders and teachers do in various management functions, how leadership teams work together and how teachers participate in decision-making. The analysis shows that while leadership duties are attended to by both the mid-level leaders and by teachers who are assigned leadership functions, the headteacher is perceived as the teachers' real leader. The study concludes that teachers expect the headteacher to act supportively, encourage mid-level leaders and teachers in leadership functions to engage in the governance of the school, lead the school as a joint team along with other participants in the leadership team and motivate and enable teachers to participate in the school's decision-making processes.

**Hammersley-Fletcher & Strain (2011)** have reanalysed their own prior studies conducted over a period of fifteen years (1996-2007) to find out if and how mid-level leaders' attitudes have changed during the period. They have examined how mid-level leaders describe their

leadership actions and whether they consider themselves primarily as implementers of government initiatives, or as creators of their own scope of action. English teachers were initially sceptical towards having additional school leaders and did not want more structural hierarchy. They feared that if schools got additional leaders, while at the same time there was a rise in accountability pressure, teachers could be (so to speak) "led" away from the classroom and assigned administrative teaching tasks such as charting student's learning outcomes. In recent years, attention given to developmental work and quality improvement has not brought teachers back to the classroom. Instead, they are recruited to create forms listing tasks that others are to implement. What often occurs is that the unskilled (cheaper labour) drive teaching according to the "recipes" of qualified teachers. Hammersley-Fletcher & Strain (2011) point out that much research assumes that mid-level leaders can be agents of change in schools, but that appointment as a mid-level leader does not in itself confer necessary authority and respect. The three studies conducted over the period of 15 years show a stable pattern; namely, that the formal leadership is placed at the top of the organization and that the mid-level leaders' job is mainly to maintain order in the ranks.

SURVEY PERIOD	STUDY CONTENT	FINDINGS
1996-1999	Twenty teachers serving in a type of mid-level leader position in ten English lower secondary schools were interviewed.  Their tasks were to advise colleagues, lessen their teaching burden, ensure that equipment was in place in classrooms etc. They were also expected to contribute in assessing teachers' work	<ul style="list-style-type: none"> <li>Teachers did not like being called leaders or exercising leadership</li> <li>They declined to assess colleagues' work</li> <li>They didn't like telling others what to do</li> <li>They tried to lead by creating enthusiasm</li> <li>They preferred that the headteacher told teachers that change was needed so that they did not have to force anyone to do something</li> </ul>
2002-2004	44 semi-structured interviews in 22 schools  Mid-level leaders were to act as mentors in their academic field and implement centrally initiated measures, not take their own initiatives	<ul style="list-style-type: none"> <li>The mid-level leaders liked to lead by consensus</li> <li>They tried to get teachers to work together in teams</li> <li>Much is gained if one is able to persuade the "difficult" colleagues</li> <li>Scope of action and opportunities to think innovatively and develop depended on the headteacher</li> <li>«I am a <i>channel</i> for centrally initiated measures»</li> </ul>
2004-2007	9 mid-level leaders from 9 lower secondary schools  An important part of the job was to take initiative and bring about change	<ul style="list-style-type: none"> <li>The formal responsibility lies with the rector</li> <li>The headteacher must ensure the backing of teachers so that mid-level leaders can do their job</li> </ul>

The fact that the mid-level leader's scope of action depends on an external authority (centrally initiated measures or that the principal must tell teachers that change is needed) demonstrates that mid-level leadership represents complicated activities and that some problems cannot be resolved merely by giving a teacher a formal position as a mid-level leader.

Data from the most recent survey (2004-2007) confirm that the position of mid-level school leaders remains vague. Hammersley-Fletcher & Strain (2011) believe that there is still a somewhat out-dated expectation that the mid-level leader's job is to convey ambitions of reform and implement externally designed change measures and that the time has come to question the traditional understanding of leadership as something *layered*. The researchers conclude that if we want more creativity in schools, the solution is probably not to establish a leadership hierarchy. They reject the paradoxical notion that teachers must be called "leaders" in order to initiate academic development. If the goal is innovation and creative practice, resources can instead be spent on bringing teachers together to discuss how they can renew practices as a professional collective. Thus, it is called into question whether a layered organizational structure with mid-level leaders is the best solution.

**Kelley & Dikkers (2016)** asked what can be achieved by allowing feedback in management groups with distributed responsibilities to be task-based, rather than individual and role-based. The study, which includes 21 school leaders and teachers with leadership responsibilities in six schools (lower secondary and upper secondary schools) in two districts of the United States, used questionnaires and interviews to solicit experiences via an online feedback system (CALL). Participants in the study reported many benefits - such as transparency - when a 360° system was used based on task-based feedback from multiple evaluators at the same time, from formal managers, colleagues, students and external participants. Such a broad-spectrum assessment scheme is better adapted to schools with distributed leadership because the focus of attention is moved from individual achievements to tasks that need to be accomplished jointly. When assessment is task-based, the problem of some participants easily construing feedback as personal criticism is avoided.

Instead of asking what the individual leader can do to make the school perform better, the issue becomes how better to solve the tasks by working smarter together as a team. Most situations in schools are characterized by shared responsibility and actions that require one another, and the system made it easier for the individual to see what should be done and what could be achieved in the short and long term. Because the system for feedback mainly targeted ongoing tasks and thus helped initiate useful conversations about school development, it had a *formative* effect and strengthened the distributed leadership of the schools included in the study.

**O'Donovan (2015)** conducted an interview in three Irish secondary schools as a consequence of school leaders reporting increased work pressure in recent years. As budgets become tighter, they are increasingly assigned additional administrative duties and are expected to be drivers in the effort to develop and renew the school organization. The study examined how

eaders and teachers "construct" leadership, i.e. what they are thinking when they carry out their leadership tasks. The leaders interviewed pointed out that leadership has both a moral and an emotional aspect. All the headteachers believed that an important part of the job was to build trust, but there were major differences in how schools carried out the trust-building effort. One headteacher was keen on encouraging teachers to take a little more risk, to try new things; he pointed out that the leader's job was sometimes about *taking* initiative and other times about *supporting* initiative. Another headteacher said that leadership is largely about injecting as much energy as possible and avoiding energy loss. Negotiations were mentioned as an important part of the job. A recurrent feature in all the interviews was that the headteacher was referred to as the school's visionary, *real* and "true" leader. There was a consensus that school development was the goal, but it was difficult to connect leadership practices to the school's core tasks: teaching and learning. The study finds that although principals at the three schools endorsed the idea of distributed leadership, the term has not caught on in the schools that were investigated. It is a challenge to school leaders, teachers and the administration that schools in Ireland have a hierarchical structure and little tradition of cooperation.

The headteachers coped with increased work pressures and high expectations for student performance through strategic planning and distributing leadership via negotiations and persuasion. Both teachers and mid-level school leaders acknowledged that they had to take their share of responsibility and "support" the headteacher, who is the school's *real* leader. In all three schools, a culture of isolationism was observed, which O'Donovan believes can be attributed to the fact that Irish teachers have long worked behind closed doors.

Using a method they call *narrative capture*, **Petrides, James & Karaglani (2014)** examined how mid-level leaders at two major city schools in the USA perceive their function in a distributed leadership system. The mid-level leaders used a web portal to write narratives about either a time when they had to make a difficult decision or a time when they faced a dilemma. They also interpreted their own stories using a set of indicators that showed the decision-making processes they had faced and the kind of interaction they had experienced with the teachers they referred to in their narratives. Ninety stories were collected from 45 mid-level school leaders. There was much variation among the 45 participants, in terms of both age and job experience, but most were between 31 and 40 years old and had been in the job between one and three years. The texts were analysed according to categories drawn from the school development goals and stressed the responsibility of mid-level school leaders to contribute in developing the school's teaching. During the data analysis, the researchers looked at the types of decision-making the mid-level leaders stated they had chosen, the type of leader they considered themselves to be, the characteristics of their problem solving strategies and how they interact with teachers. In each category, the stories were placed along a continuum. For example, the answers to questions about type of leadership were scored from "very concerned with administrative and technical tasks" at one extreme to "very keen to help improve school teaching and learning" on the other.



Many mid-level leaders described a situation in which they desired to work on teaching-related tasks, and felt very obliged to do so, but did not feel that they had the support of the headteacher. The researchers believe that this may indicate that the tasks of the mid-level leaders are not defined clearly enough and that they experience somewhat unclear, perhaps even dual expectations about what they are to do. The answers in the category of strategies they chose for problem solving fell at the two extremes along a continuum ranging from «based only on gut feeling» to «based only on facts or performance goals». The tendency here was that they mainly considered themselves fact-based. One somewhat paradoxical finding in Petrides et al. (2014) is that mid-level leaders with the least amount of experience described their practices as mainly oriented towards improving teaching, while at the same time they thought that what they did influenced teachers' practices only to a small extent. The researchers believe that these are important insights for designers of courses for mid-level school leaders. The balancing act of this kind may be a matter of both providing teachers with administrative and technical support and helping them maintain good relationships with students and ensure order in the classroom. The programmes must also take into account that mid-level leaders have different perceptions of what is most important in the job, plus the fact that there may be completely different expectations and perceptions within the group of mid-level leaders. The programmes need to give mid-level leaders ample opportunities to discuss how to talk to teachers about teaching and what they need to make changes.

### Summary 3.1

The articles that have been reviewed reflect that distributed leadership is both an analytical perspective that can be used to understand the school organization and an understanding of leadership as relational practices. The studies have examined distributed leadership as *teamwork* and *the context* in which leadership is exercised. Several of the articles point out that the function of the headteacher is overloaded due to the increased complexity of the schools' environment and because the schools have had both new requirements for reporting and budget cuts imposed on them. Several of the researchers point out that a stable pattern has emerged showing that the function of the mid-level leader is *unclear*. The headteacher is the school's *real* leader, placed at the top of the school hierarchy, and although mid-level leaders hold a management position, they are not given the necessary leadership authority. It is assumed that they are to contribute in the school's developmental work, whereas in reality they are implementers of centrally initiated measures. This is partly due to the fact that they primarily have technical-administrative tasks. The studies also show that team leadership in schools can work well when the headteacher is the team leader and coordinates the team's tasks. Rather than conducting role-based evaluations, it may be beneficial to give leaders feedback on the tasks they perform. In this way, one may also capture the context in which work takes place. Teachers have traditionally been less concerned with the school as an organization, but supportive headteachers who are collectively oriented enable them to see their job in a larger context and make them more interested in the framework surrounding teaching. One study (Hammersley-Fletcher & Strain, 2011) points out that management in schools is *layered* and that a lack of communication between the «teams» can hamper implementation and system improvement.

The systematic knowledge review has been compiled to answer the research question: *What characterizes the work situation of mid-level school leaders and what are their needs in terms of knowledge?* The six studies that have been reviewed in this section confirm previous research that claims mid-level leaders largely have work assignments that neither build their competence nor prepare them for the position of headteacher. Interestingly, several studies point to the headteacher having to tell teachers what will happen before teachers will follow instructions from mid-level leaders. As they lack leadership authority, it also becomes difficult for them to act as anything other than facilitators of centrally initiated tasks.

### Implications for the development of courses

- New thinking should address the organization and leadership in schools, and mid-level leaders need to be offered training in team leadership and types of collective leadership
- Mid-level leaders need practice in providing and receiving feedback
- Programmes must be designed to help mid-level leaders understand how to balance technical tasks with the development part of the job
- Programs must provide mid-level leaders with varied opportunities to come aware of how to proceed when talking to teachers about their teaching

### 3.2 Learning Communities, Mentoring and Coaching

This subchapter presents seven articles (Bouchamma & Michaud, 2011 & 2014; Friedman, 2011; Marshall & Davidson, 2016; Lochmiller & Karnopp, 2016; Liang & Augustine-Shaw, 2016; and Service, Dalglic & Thornton, 2016), that have investigated what benefits mid-level managers derive from participating in learning communities and in programmes in which guidance (mentoring and coaching) is an important component.

#### 3.2.1 Learning Community

Professional learning community (PLC) is a term used in various ways to denote interim collaborative constellations established for a specific purpose or a professional community to which one belongs at work. Here, three studies are presented that have examined various learning communities:

AUTHORS	COUNTRY	HAVE INVESTIGATED
<b>Bouchamma &amp; Michaud (2011)</b>	Canada	Participating in a learning community
<b>Bouchamma &amp; Michaud (2014)</b>	Canada	New programme for teacher assessment
<b>Friedman (2011)</b>	Israel	Learning community relating to English teaching

Bouchamma & Michaud (2011) and (2014) base their work on Wenger's theory of practice communities that identifies four components in a learning community: 1) **Meaning**: Learning as an experience, 2) **practice**: "Learning by doing", 3) **Community**: Learning by participating in joint activities, 4) **Identity**: The attitudes and values of the members are influenced by the learning activities,<sup>78</sup> and they maintain that learning communities are developed through practice and that collective knowledge is developed when individuals share their own experiences.

**Bouchamma & Michaud (2011)** have examined a learning community in Canada where headteachers, deputy headteachers and department heads meet monthly because they provide guidance for teachers in a new teacher assessment programme. The goal was to enhance the participants' knowledge of teacher assessment and support them in their work. The researchers interviewed each participant in the learning community at the end of the first and second project year. According to the participants, they shared both good and not-so-good experiences from their guidance sessions in the learning community. The informants highlighted several advantages of the learning community, including their enhanced understanding of the complexity in a guidance process and having acquired new perspectives on their own practice. They received moral support, felt less alone, learned a lot from reflecting on practice with others who were in the same situation, and got help to master new skills. The conversations in the learning community gave them increased self-esteem and they felt better prepared for new guidance tasks such as interviewing teachers, writing observation reports, and designing evaluation forms. Fruitful discussions resulted in a sense of collegiality that extended beyond the project period.

In the second study, Bouchamma & Michaud (2014) examined implementation of a teacher assessment program. The data consisted of transcribed recordings from meetings over a period of two years. The members identified several issues related to the implementation of the programme, such as the lack of resources (both human (competence) and material) which resulted in their being unable to meet teachers' training needs and do a good enough job. They also discussed issues related to their dual role as school leader and pedagogical supervisor and pointed out that the headteacher often lacks competence to evaluate teachers' work. Lack of time made it difficult for school leaders to function as educational leaders and support teachers in implementation and restructuring processes. In the meetings, it was also discussed that teacher assessment should be both summative and formative, that it can be difficult to carry out individual assessments and know how best to follow up last year's evaluation. Getting teachers to work together was described as an important but difficult task. Some said that the formation of learning communities in schools was encouraged, but that teachers were unmotivated because they could not see any long-term benefits from this.

In the third study on learning communities, **Friedman (2011)** examined how academic leaders in English language teaching in five Israeli upper secondary schools practice leadership. Data

78. Wenger, E. (1998). *Communities of practice: Learning, meaning, and identity*. Cambridge University Press.

collected through observations and interviews with academic leaders and headteachers shows that while all headteachers described themselves as democratically oriented leaders who respected the expertise of the leaders, they used controls and measurements to «navigate the ship». External control diminished the academic leaders' leeway to act, and four out of five believed that the headteacher interfered too much and weakened their authority. The principal expected the academic leaders to be responsible for the department's performance and to monitor and supervise the teachers' work. The leaders chose not to do this because they preferred collegial relationships with teachers and did not wish to be isolated in a leadership position. The study shows that the academic leaders acted as facilitators in their learning communities. They adapted new ways of working with routine procedures, so that teachers managed to cope with unpredictability and inconsistencies. The academic leaders defended teachers against criticism and made external demands more acceptable and practical. The English teachers reported that they found enhanced faith in themselves when the academic leader could model good teaching methods, but because the academic leaders had their own teaching schedules, they were available to teachers only sporadically.

### 3.2.2 Mentoring and Coaching

Four studies examined the guidance practices involving mid-level school leaders.

AUTHORS	COUNTRY	HAVE INVESTIGATED
<b>Marshall &amp; Davidson (2016)</b>	USA	Mid-level leaders' challenges and how mentoring can help
<b>Lochmiller &amp; Karnopp (2016)</b>	USA	How the headteacher influences leadership mentors who work with mid-level leaders
<b>Liang &amp; Augustine-Shaw (2016)</b>	USA	Mid-level leaders' experiences with mentoring and what they think about the training programme
<b>Service, Dalgic &amp; Thornton (2016)</b>	New Zealand	How and what mid-level school leaders learn by shadowing an experienced headteacher as part of a leadership development programme for aspiring headteachers

In a theoretical article, **Marshall & Davidson (2016)** present challenges that mid-level leaders typically encounter when they start in the job. They find that most mid-level leaders go into practice shock because they discover that the school has many hidden rules that they have to deal with. This is why newly hired mid-level leaders need a support system that includes a mentor, preferably an experienced headteacher. They present a mentoring model that may be a solution to this. First, one must identify and recruit potential mentors, select the specially qualified ones, include them in a "mentor bank" and ensure that school administrators locally and regionally can access them.

In an investigation conducted in the USA, **Lochmiller & Karnopp (2016)** show how the headteacher influences the personnel who will mentor mid-level school leaders. The researchers followed a three-year leadership coaching programme with 22 participants: Nine mentors, ten mid-level leaders and three programme coordinators. The data consisted of interviews and documents from the programme; in the analysis, three distinct themes emerged. First, it turned out that the headteachers, both directly and indirectly, controlled the coaches' work with the mid-level leaders. Second, this situation affected the coaches' opportunity to develop a confidential relationship with the mid-level leaders as well as the strategies they could use in the guidance. Third, the headteachers steered the coaching topics by deciding what the mid-level leaders' duties and responsibilities should be. The coaches were frustrated over the difficulty they had in developing leadership responsibility with the mid-level leaders because the latter's tasks were usually of an administrative nature.

**Liang & Augustine-Shaw (2016)** examined the experiences of participants in a programme for mid-level leaders in Kansas. The participants were 12 middle managers and 5 mentors, and data were collected through questionnaires and interviews. The survey showed that mid-level leaders found they learned much from the programme and that the relationship between the mentor and the mentee was crucial. The three components ranked highest were that the mentor observed their achievements and gave them feedback; that they were allowed to attend meetings where professional issues were discussed, and that the mentor modelled behaviour for them. In addition, group meetings with other mentors, guidance, and the fact that the mentor visited the mid-level leader's school, were all highly rated programme components. Other important topics were the importance of trusting relationships and mutual learning between the mentor and the mentee.

**Service, Dalgic & Thornton (2016)** examined how mid-level leaders learn by shadowing an experienced headteacher in a recruitment programme. New Zealand has a shortage of headteachers, and the University of Victoria has developed a master's degree in school management for mid-level leaders and department heads in secondary schools who could become future headteachers. One programme component is mandatory mentoring. Course participants spend a week in different schools shadowing an experienced headteacher who also serves as their mentor. After a day of shadowing, the headteacher and course participants meet to reflect over the observations made throughout the day. Analysis of data from an interview with 13 participants shows that shadowing enhanced the programme's attractiveness because participants were allowed to observe a broad range of headteachers' tasks, experienced how these were dealt with on the spot and gained increased insight into the complexity of the headteacher's job. They gained insight into what headteachers do on a daily basis and what it means to run a school. The participants characterized as 'priceless' the opportunity they had to meet with the headteacher at the end of the day and discuss their observations and reflect together about the headteacher's actions. The participants also perceived it valuable to have access to a network of experienced headteachers on whom they could rely for their further career development.

## Summary 3.2

As with distributed management, the learning community is a unclear term used in many ways and with different theoretical grounds. Studies examining activities in learning communities are concerned with collaboration and interactions and therefore often build on socio-cultural learning theory that assumes learning occurs through social and relational practices. The studies show that learning communities can be used to support leaders who will be attending to educational development tasks in areas where they lack or have weak skills, for example in the assessment of teachers' work. Learning communities can provide moral support in the form of confirmation, practical tips and good advice. Sharing experiences enhances the understanding of the complexity of educational processes. It can be difficult to balance an administrative position with a function in which one drives development. Some headteachers, although they consider themselves democratically oriented, have a tendency to govern even after they have delegated duties. Mentoring activities such as advising and coaching show that building networks in and between schools serves as a resource, primarily by confirming practices and assumptions. Mid-level leaders like to learn by observing experienced headteachers, and being able to talk to them about what they have observed in an open atmosphere of trust. It is also motivating to receive feedback on one's own leadership actions and to see good examples modelled.

### Implications for course design:

- Participants should bring case assignments from their own school/institution that they can practice in constructed learning communities during the course
- Participants must have ample opportunity to discuss matters/issues related to both having a formal leadership position and at the same time attending to development tasks
- The programmes must provide binding network activities between participants, before, during and after the course
- The programs must have a built-in structure that ensures participants ongoing feedback in the form of guidance activities from experienced headteachers or leadership coaches
- A task between course days might be that participants spend a day shadowing principals in the municipality/region. Results from the observations can be presented and discussed during the course

### 3.3 Mid-Level Leaders' Work Tasks and Position in the Schools

Eleven articles are presented here: (Abrahamsen, 2017; Gurr & Grysdale, 2013; Irvine & Browning, 2016; Kaparou & Bush, 2015; Koh et al. 2011; Leithwood, 2016; McCauley-Smith et al, 2013; Mulholland, McKinley & Sproule, 2017; Muñoz & Barber, 2011; Ng, 2015 and Paranositic & Riveros, 2017) who have examined the work tasks that mid-level leaders have in school, and their relationships with the headteacher and teachers. A pervasive argument is that mid-level leaders must be regarded as key people in the effort to improve school teaching and learning; This must be reflected in the school structures, and priority must be given to the development of the leaders' competence and leadership skills.

#### 3.3.1 Background

Developments in education policy (such as 21 C skills) make mid-level school leaders a central professional group in the schools. School life is hectic and complex; employees must cope with very different events at different levels and with varied difficulty at a rapid pace. This is also a characteristic of the mid-level leaders' job situation. Many of them are both teachers and school leaders, and much of what needs to be done is taken care of during recess and lunch breaks. Leading colleagues and leading students are two different activities. Because those who become mid-level school leaders are expected to lead colleagues, perhaps for the first time, it is assumed that training programmes for mid-level personnel should have a different design than programmes for those who are preparing to become headteachers

and may have leadership experience already. However, something can be learned from new programmes for headteachers in which the interest in leadership development (individual) has expanded to include a focus on leadership as a practice, where the central task is to develop the organization's collective capacity.

The interest in distributed leadership reflects an increased understanding of the importance of relationships between those who lead and those who are led, as well as the relationship between leadership and the context in which leadership is exercised - particularly when it comes to development and change. Some point out that we lack a sufficient understanding of what it means to lead schools because few studies have investigated this empirically. We need more knowledge, for example, about how practitioners "do" policy implementation. How do they understand, interpret, and adapt policies to practice - in practice?<sup>79</sup> School reforms have long been characterized by productivity and "value for money", but now interest has turned toward the professional part of the work in schools, collaboration and partnership. New and more flexible network models are being tested, and hierarchical forms of organization are being questioned.

79. Ball, S., Maguire, M., & Braun, A. (2012). How schools do policy: Policy enactments in secondary schools. London: Routledge.

Many researchers point out that mid-level leaders are in a unique position to implement policy initiatives and improve school performance because they have direct access to the classroom, close contact with teachers and their attention is focused on the school's core tasks. However, studies find disagreement between headteachers and mid-level school leaders even about how the job should be designed. In other words, there is poor correlation between ideals and reality and there is reason to believe that a clearer demarcation of the position can make the position more attractive and at the same time facilitate targeted professional development for this group of school leaders.

#### 3.3.2 Presentation of the articles

AUTHORS	COUNTRY	HAVE INVESTIGATED
<b>Abrahamsen (2017)</b>	Norway	Mid-level leaders' conceptualization of being responsible for the school's educational development work
<b>Gurr &amp; Drysdale (2013)</b>	Australia	Analyses three PhD dissertations that have examined mid-level school leaders' work situation
<b>Irvine &amp; Brundrett (2016)</b>	England	How 25 mid-level leaders perceive their jobs
<b>Kaparou &amp; Bush (2015)</b>	Malaysia/ England	Whether school leaders act as pedagogical leaders and to what extent
<b>Koh, Gurr, Drysdale &amp; Ang (2011)</b>	Australia/ Singapore	How headteachers regard the position of mid-level leader
<b>Leithwood (2016)</b>	Canada	Review article about mid-level leaders in upper secondary school
<b>McCauley-Smith et al (2013)</b>	England	A leadership course tailored to the leaders of three merged institutions
<b>Mulholland, McKinley &amp; Sproule (2017)</b>	England	How teachers, mid-level leaders and headteachers perceive their work situation
<b>Muñoz &amp; Barber (2011)</b>	USA	What aspects of the job motivate people to apply for a position as a mid-level leader
<b>Ng (2015)</b>	Singapore	How mid-level leaders understand quality in the schools
<b>Paranositic &amp; Riveros (2017)</b>	Canada	Mid-level leaders' job experiences

**Abrahamsen (2017)** takes the restructuring of Norwegian municipalities as a point of departure, where mid-level managers who have held purely administrative positions are given professional leadership functions. There is a shift from hierarchical relationships in which being a mid-level leader primarily meant executing orders from senior management and organizing networks where intermediaries are expected to take the initiative both ways, bridging and disseminating perspectives between different groups of stakeholders. Data have been collected through focus group interviews with 13 middle managers and observations of leadership meetings in four schools. The study shows how mid-level leaders in lower secondary school perceive their work situation, what is involved in being responsible for both the teachers' work and the school's education development work.

The findings are analysed in three categories: a) How mid-level leaders understand their function in relation to the headteacher; b) how they understand their function in relation to teachers and c) how they experience being "in the middle". The informants had different perceptions of how the restructuring had affected their work situation. At one school, the headteacher was still the person who made decisions and delegated tasks; at another school, decisions were made in the leadership team. The study also finds that even when the formal responsibility clearly lies with the mid-level leader, some teachers, if they perceive the matter at hand to be serious enough, by-pass the mid-level leader and go directly to the headteacher. Moreover, the headteacher does not always inform the mid-level leader that this has occurred. One of the informants said that he sometimes thinks of himself as a teacher who is assumed to be a leader, i.e. *really* a teacher, or a teacher *more than* leader. Several of the informants pointed out that it is difficult to be accepted as a school leader. Teachers want leadership, but they don't want to be led - and they challenge authority. They want help and support to perform their duties, but they want to have the freedom to design their work situation as they wish. The informants described themselves as *messengers* between teachers and the headteacher - a channel of communication. They do not have the same authority as the headteacher, because the headteacher has the decision-making authority and position that the intermediary does not have.

It is unclear what leeway mid-level leaders have to act on their own - they are only leaders relative to the headteacher. Therefore, many mid-level leaders have to ask about *everything*. They struggle to find their proper place, and their opportunities to influence the work in schools depends on the headteacher's leadership strategy and how the headteacher has designed their job. If teachers want leadership but don't want to be led, it may be that they want assistants - but it may also be that they do not want a supervisor who controls or checks up on what they are doing. The mid-level leaders were of the opinion that they are strongest as a group. As a team, they have greater impact on the headteacher, and it becomes easier to provide the headteacher with information about the work taking place in the school. They find themselves squeezed in the middle, with less opportunity to influence than what they actually want - while at the same time they want to be leaders with decision-making authority. The study shows that reorganization of the leadership structure at the school uncovers tensions between autonomy and control.

**Gurr & Drysdale (2013)** analysed three doctoral dissertations on school management from the University of Melbourne. All three are based on interviews with headteachers, mid-level leaders and academic leaders in upper secondary schools and finds that mid-level leaders have completely different jobs. While some are expected to be responsible for teaching and learning, other mid-level school leaders do not have this in their job description. This means that mid-level leaders face completely different challenges. One thesis found that less competent mid-level leaders were mainly assigned administrative and routine tasks, while the more competent were engaged as pedagogical leaders and strategic contributors in the renewal of pedagogics.

To become a school leader in Australia, a completed teacher education is needed. Typically, skilled teachers are recruited who practise leadership skills through job experience in a master-apprenticeship model. After comparing Australia, the USA and Denmark, Gurr et al. (2011)<sup>80</sup> found that all headteachers talked about the importance of strong personal motivation and a strong and supportive mentor. Headteachers like hands-on experience, social and professional support and the opportunities for cooperation. The article concludes with some suggestions on what leadership programmes should contain if they are to support mid-level leaders:

A LEADERSHIP PROGRAMME MUST CONTAIN
Introductory courses, coaching, mentoring, teamwork training, how to work in learning communities, formal and informal training, short and longer courses in professional learning and performance management.
Headteachers need courses to learn how to support mid-level leaders
Courses must contain knowledge about teaching and learning

The article concludes that not all headteachers understand the need for training, but that courses that fail to emphasize professional learning represent a lost opportunity for better quality in schools. Schools need a headteacher with formal authority and a leadership team in charge of developing school practices. If schools are to succeed in fulfilling their mandate, they must have ambitious goals for students and creative and responsive learning environments in which teachers are considered participants in a professional community.

**Irvine & Brundrett (2016)** interviewed 25 new employees at a boys' school (upper secondary school) shortly after they had left their assignments as class leaders and begun to lead their colleagues. In the analysis of the data, it became clear that the participants, who had been leaders of children and adolescents, found it very challenging to lead adults. Although they had skills in class management, leading peers was something completely different. Everyone considered personnel management as a difficult part of the job - this was due both to the wide range in age among personnel and to disagreement within the staff. As many as 75% of the informants talked at length about their relationship with students even though the interview explicitly asked them to talk about leading colleagues.

80. Gurr, D., Drysdale, L., Ylimaki, R. M., & Moos, L. (2011). Preparing instructional leaders. In *US and Cross-National Policies, Practices, and Preparation* (pp. 125-152). Springer Netherlands.

### FACTORS THAT CHALLENGE MID-LEVEL LEADERS

None of the informants was able to define and describe the parameters of their job. One informant described it as “vague and amorphous” and many said it was unclearly structured. They described a school culture that involved continuing to do things as you have always done, with little interest in change. Most informants found it difficult to lead a heterogeneous group towards common goals. They never had time to get the job done properly; much of their work is reactive (one can suddenly be interrupted by something that simply HAS TO BE solved). The pressure to continually improve student performance was also noted. The informants felt ill-prepared for the job and said they had not had a proper introduction to their tasks.

### FACTORS THAT CAN MAKE THE JOB EASIER

It is important to find their strengths, get acquainted with the people that one will be leading and develop one’s own leadership style, to know oneself and have time for reflection. They also wanted a mentor that they could talk to about things they experienced.

The study concludes that mid-level leaders face many challenges, and most are beyond their control. However, some challenges can be controlled, for example by prioritizing in ways that make it easier to survive in the job. In all leadership, goals, direction and purpose are important, and mid-level leaders need training other than what teachers undergo.

**Kaparou & Bush (2015)** interviewed Greek headteachers, mid-level school leaders and academic leaders; they find that in bureaucratic systems, expectations about what is to be done are often of an administrative nature. When they talk about their work, school leaders try to act “bureaucratically correctly” (p. 329) by referring to master goals. Teacher assessment is considered a threat rather than an opportunity for improvement, and the teachers’ association does not want school leaders to “monitor” teachers. This is largely a matter of low conviction that the leaders have the necessary expertise, and the tendency to conduct formal evaluations usually after complaints have been made. Teachers are responsible for their teaching, and there is little acceptance for educational work needing support or guidance. Although governance documents refer to them as educational leaders, the leaders themselves have few opportunities to adapt locally. As there is a lack of a clear assignment of responsibility and identification of the personnel who are to exercise educational leadership, pedagogical accountability is often a function that teachers assume.

**Koh, Gurr, Drysdale & Ang (2011)** have used an interview to investigate the working situation of 12 headteachers and lower secondary school leaders in Singapore, where each school has a headteacher and two deputy headteachers as well as a team of academic leaders (team leaders) who support teachers’ educational work. The schools are organized in wards and may have up to 3,000 pupils. In 2009, the average class size was 34.2 pupils. The researchers wanted to get the headteacher/deputy headteacher’s view on the function of mid-level leader.

The data analysis showed that mid-level leaders’ tasks could be grouped under the following seven categories:

MID-LEVEL LEADERS’ WORK TASKS	
1.	Teaching and Learning
2.	Develop a vision, point the way
3.	Lead teachers
4.	Communicate
5.	Evolve as a leader
6.	Changing roles
7.	Challenges

The headteacher and deputy headteachers are of the opinion that the core tasks of the team leaders are 1) **teaching and learning** as well as 3) **leading teachers**. They will work as exemplary role models and have the responsibility to find and disseminate good practices among teachers. On topic 2) **develop a vision and point the way**, the headteacher and deputy headteacher believe that team leaders should develop their ability to think strategically, have a bird’s eye view of the activities, look beyond immediate departmental interests and put the school’s interests first. They need to understand that everyone who has leadership functions works together to ensure that the school achieves its strategic goals. On topic 4) **communicate**, the headteacher and deputy headteacher believe that team leaders act as intermediaries and serve as a communication channel between the headteacher/deputy headteachers and teachers (“we see teachers once a week, they see them daily,” p. 615). On topic 5) **evolve as a leader** and topic 6) **changing roles**, the headteacher and deputy headteacher said that team leaders have a large administrative work burden in the form of standards to be complied with and forms that need to be filled out and that they are under conflicting pressures. They receive guidance from the headteacher and deputy headteacher, who encourage them to take responsibility for their own professional development, to enrol in courses and develop their skills. In terms of the last category, 7) **challenges**, the headteacher and deputy headteacher believe that team leaders must find ways to cope with opposition from teachers. They point out that team leaders must learn how to organize their time because their work situation is difficult and comprises many tasks in addition to their teaching position.

In the discussion, researchers ask whether the headteacher and deputy headteacher, when answering the study’s questions, have consolidated, or *amalgamated* what team leaders’ jobs actually consist of with an idealized version of what they think they *should* do.

**Leithwood (2016)** reviewed 42 studies to identify mid-level leaders' contributions towards student learning outcomes and the school's development, the challenges that mid-level leaders encounter and the factors under which they succeed in their jobs. One finding is that mid-level leaders can have a positive impact on student learning outcomes, and that counterforces may be teacher organizations, teacher cultures, certain headmasters' perception of roles and responsibilities and the mid-level school leaders themselves. Studies that have examined the efficacy of school leaders, teachers, the school itself and the district on student learning outcomes find that the effect increases the closer the student is to the function<sup>81</sup>.

Mid-level school leaders normally remain longer in their job than the headteacher, often developing closer ties and more trust with teachers, because they also participate in teachers' professional development. Many teachers (and their educators associations) are sceptical of having more mid-level leaders in schools - especially if the purpose is to have them observe teaching. The responsibilities and tasks of the mid-level school leaders are usually determined by the headteacher and the formal position is often not clearly defined. Some think that mid-level leaders should be available when the headteacher needs them and should act on the headteacher's initiative, while others regard leadership as distributed practices within the organization. Studies also find that many mid-level leaders do not want extensive leadership responsibility.

Studies<sup>82</sup> that have examined schools where mid-level governance works well have found the following characteristics of good middle-management practices:

CHARACTERISTICS OF GOOD MID-LEVEL LEADERSHIP PRACTICES
Collegial management style
Clear idea of the goal, how it can be reached in a purely practical way, and good resource management
Focused attention on teaching and learning and a well-functioning assessment system
Consistency in placing the pupil and pupil autonomy at the centre
Structured hours and regular feedback
Good organization of homework, assessment practices, etc.
Clear routines and practices in class
Curriculum adapted to students' needs

81. A study of 30 mid-level leaders at ten upper secondary schools in New Zealand found that students' backgrounds and socio-economic status explained between 46% and 62% of the variation in student learning outcomes while mid-level school leaders explained between 16-22%. Another found that teachers in a small district of North Carolina explained 54% of the variation in learning outcomes, while schools and districts explained 20% and 25% of the variation respectively. In a large district in Florida, the numbers were 75-85% for teachers, school 12-15% and the district 4-6%. It seems that mid-level school leaders working in small districts in the USA are more likely to influence student learning outcomes than mid-level leaders in larger districts.

82. Harris, A., Jamieson, I., & Russ, J. (1995). A study of 'effective' departments in secondary schools. *School organisation*, 15(3), 283-299.

**Leithwood (2016)** concludes that headteachers and mid-level leaders *together* can exercise good pedagogical leadership and contribute substantially to improving the school. The premise, however, is that the mid-level school leaders receive the wholehearted support of the headteacher.

**McCauley-Smith (2013)** has followed a merger process uniting three schools in northern England (a lower secondary school, a special school and an upper secondary school) that formed a jointure in 2005. The goal was to get the leaders of the three institutions to act as a leadership team in the new institution. The process was deemed to be very successful, both in terms of the implementation of the merger and the results the new school is able to demonstrate. As the school did not wish to continue with a traditional leadership structure, a new system of *co-governance* (co-leadership) was initiated. The position of headteacher was considered superfluous, although the functions encompassed by the position were necessary. The first thing they did was to put the right people in the right positions, and the second step was to design an HR strategy. A leadership development course based on problem-solving activities and adapted to the merger process helped mid-level leaders boost their knowledge about the situations they would have to deal with as leaders. They learned how to lead discussions, cope with disagreements and tensions, acknowledge others and others' points of view, as well as reflect on their own practices. They developed personally, gained leadership skills beyond what they had as teachers, improved on strategic thinking, empathy and their ability to share good practices. The new school has become well-known for its good personnel policy, which has enhanced the school's status and attracted more applicants. The study concludes that both individual leaders *and* joint leadership are necessary.

**Mulholland, McKinley & Sproule (2017)** base their study on research showing that the teaching profession is characterised by time pressures, problems that need to be solved on the spot, discipline problems, a lot of homework and little support from leaders. As research also shows that prolonged stress can lead to burnout and lack of job motivation, researchers conducted a survey in Scottish upper secondary schools where participants responded as to whether they have a stressful work situation.

PARTICIPANTS IN THE SURVEY	QUANTITY	VERY STRESSFUL WORK SITUATION
Teachers	399	51%
Mid-level leaders	185	66%
Headteachers	175	47%

This is a definite increase over survey results in the early 2000s when well above 30% of middle managers reported a very stressful work situation. Some of the difference between the groups can be explained by the headteachers having no teaching duties, whereas most leaders are both leaders and teachers. They must deal with a continuous day-to-day stream of stress factors and do not always have control over their working day. In addition to coping with common job requirements that all employees have to expect, they keep up an extensive horizontal and vertical relations-building campaign with many people per day. Mid-level leaders who are also teachers must balance teaching tasks with a number of other school-related tasks; they have to deal with conflicts between pupils and between pupils and adults, parental inquiries and external requirements and expectations. In addition, they rarely have time to do the development work they would like to do and are even given merely random offers of continuing and further education. Many mid-level leaders also cited low engagement among teachers as an important stress factor in their job.

**Muños & Barber (2011)** have statistically analysed (ANOVA) the specific work content that seems most attractive to applicants for mid-level leader positions in Kentucky. The reason for the study is that there are few applicants for positions as a mid-level leaders in the USA. Increased accountability has changed teachers' work situation, and mid-level leaders find that they face new requirements and expectations. The researchers find that good candidates are more likely to seek a position as a mid-level school leader if the job entails professional leadership duties than if it is a purely administrative position with a lot of responsibility for student discipline. The study concludes that organizations that are planning to advertise such leadership positions must take this into account.

**Ng (2015)** believes that the discussion about quality dangles between airy ideals and what can actually be achieved. He argues that it is to no avail to create a standard definition of quality in education, as it can easily become an idealized version of what education *should* be. In the study, he asked mid-level school leaders in Singapore what they understand by the term quality in education and how they believe quality can be developed. The interviewees believed that quality development means holistic processes. Quality means that students gain the knowledge and skills they need to function in the school of the future, that education develops their creativity, trains them to think critically, gives them the desire to learn and values along with attitudes such as respect, kindness, justice, concern for others etc. Quality in education assumes skilled teachers who are committed, inspiring and caring and can facilitate good learning processes tailored to the individual and promote a good learning environment. One obstacle is perhaps too much distance between lofty visions and everyday life in the classroom. If you want change, it is important to understand that practitioners need to know that they are doing meaningful and constructive activities. Some informants believed that the school needs fewer bureaucratic structures and that structures should instead be established to support the development of quality in education, not structures that direct employee actions in a direction determined outside the school. If one is to be able to learn from others, one must delve into understanding both the context and the principles for success, not blindly import the actions and approaches of other people.

**Paranasic, N., & Riveros, A. (2017)** have examined how mid-level managers talk about their job, and categorized findings from a qualitative interview study in *six metaphors* (liaison, role model, coordinator, warehouse foreman, attorney and filter) as described here:

FUNCTION	TASKS
<b>LIAISON</b>	The interviews showed that the liaison function was an important aspect of the mid-level managers' work. At the same time as they are teachers, they are also the "eyes and ears" of the administration. It's very advantageous for them to know what's going on "on the floor," an asset that makes them the perfect nodal point for the school. Their special contribution to the school organization lies in the collegial expression: «we know each other». Although they could act as the "voice of the administration," they did not perceive that they had any real power or authority, which may be due to the way schools are organized - with many formal and informal structures. They also believed that, by acting as liaisons, they did many tasks that teachers should have done.
<b>Role model</b>	Frequently, skilled teachers are recruited to the position of mid-level leader, and they see it as their job to be role models for their colleagues to demonstrate what skilled teachers do. When explaining why they work well as leaders, they refer to personality traits (a person who gets things done, gets people to collaborate, etc.). Several did not consider themselves primarily as leaders, but regarded the work they did as an important part of being a teacher.
<b>Coordinator</b>	Mid-level leaders were always keen to see things in a holistic context. Active participation in planning, implementation etc. helped them to see the big picture. They also saw themselves as key players in the development of professional learning communities. They were keen on looking ahead, and it was important to ensure that the department did not stagnate, but continued to evolve. The authority they had in their function was largely related to the credibility they had as teachers.
<b>Warehouse manager</b>	Mid-level school leaders' most important work task was to keep track of the school's equipment. If teachers are to do their job properly, all the equipment must be in order. Regular and necessary tasks include buying and replacing batteries, paper clips and staples and making sure that the equipment in the gym is in good shape. The role of the mid-level leader as a manager of the school's inventory, supplies/office equipment has been underreported in research, and can only be described as a knowledge gap.
<b>Lawyer</b>	Another function that mid-level leaders hold is that of "making the administration responsible" by asking the right questions and making school leaders aware of what is going on among the staff members. Timetable planning was a key work task that also permitted mid-level school leaders to directly influence the school's development work. They are also able to influence the curriculum and determine which teachers work together.
<b>Filter</b>	Mid-level school leaders received messages, interpreted these and influenced what the information was used for. Sometimes they have to filter information (decide what to say and how). They saw it as an important task to protect the subject area, the department, the students, the school.



The interviewees were unanimously in agreement that there were no specific requirements to education/background for the job and that no standards had been developed to practise the profession. One reason why they are recruited for the job is that they “stand out” among teachers. The training consists of short courses - which the researchers point out is “shamefully” little preparation for a leadership position.

Middle managers don't have merely one, but several jobs, and receive little recognition for the work they do. The lack of a formal job definition means they are also not given training, guidance and support. Because they are positioned between the school's leadership and the teachers, they relate to two worlds, but belong to neither of them, and their world is not clearly delineated<sup>83</sup>. The study shows that the mid-level school leader's work situation is complex and not fully understood. They are in a position to contribute materially to implementing policy - provided they have support and authority, but they can also oppose change because they want their colleagues to have a positive view of them.

### Summary 3.3

The studies presented under section 3.3 show that mid-level leaders' jobs are defined to a great extent by the headteacher's preferences and that mid-level leaders have entirely different responsibilities and work situations. They are leaders only in relation to the headteacher, who has the formal power and status and is the *real* leader, giving the mid-level function a more *personal* rather than professional character. Even though the headteacher has delegated duties, he or she can accept that teachers bypass the mid-level school leader and go right to the headteacher if they believe that the matter is important enough. This undermines the authority of the mid-level leaders and makes them highly dependent on the headteacher. Many mid-level leaders have a restricted position with low recognition and have to ask superiors about everything. Most mid-level leaders have teaching as part of their position and may be perceived more as teachers than leaders. This may be because they themselves maintain their teacher identity, but also because they are a leader *light* due to the headteacher's not quite “allowing” them to be a fully-fledged leader. Since they are neither expected to be leaders nor treated as leaders, they lack basic, necessary support in the organization. The job as a mid-level leader in schools is stressful, and there is rarely time for developmental work and self-realization. In many countries, the schools have long been centrally managed, which leads to a type of school management characterised by administrative procedures and bureaucracy. In such systems, teachers are often sceptical of top administrators who launch proposals for new practices that reveal their lack of understanding of day-to-day life in the classroom. Teachers also don't want additional leadership functions in schools or teacher assessment systems, because they find that school leaders don't have the skills needed to give them feedback on the job they do. Therefore, teachers also want practical help and support, but not intervention in their teaching. Many middle managers want to be educational leaders, and researchers point out that the headteacher and mid-level school leaders *together* can act as a renewing force in schools. The counterforces are identified as certain teacher cultures, teacher organizations,

mid-level leaders and headteachers. Unrealistic, lofty policy ideas pertaining to what might be possible to achieve in schools are unproductive - ideals about school development must be tested against the actual and practical opportunities available in the school organization.

### Implications for course design

- The course must emphasize the relationship between the headteacher and mid-level leaders
- Courses for mid-level school leaders must develop their professional competence, not merely generic leadership skills
- Courses should address how to cope with stressful workdays
- Mid-level leaders need training in cooperation (how to lead discussions, deal with disagreement, tackle tensions, accept others' perspectives and reach agreement in the group)

<sup>83</sup> Busher, H. (2005). Being a middle leader: Exploring professional identities. *School Leadership & Management: Formerly School Organisation*, 25, 137-153.

### 3.4 Mid -Level Leaders' Needs in terms of Training

This section comprises 10 articles (Abebe et al., 2010; Arar, 2014; Barnett, Shoho & Oleszewski, 2012; Gurley, Anast-May & Lee, 2015; NG & Chan, 2014; Nicolaidou & Petridou, 2011; Oleszewski, Shoho & Barnett, 2012; Pirola, 2015; Thorpe & Bennett-Powell, 2014 and Wilson & Xue, 2013), all of which, in various ways, have investigated the training needs that mid-level leaders in schools have. Some studies have investigated the leaders' own perceptions of the training they need, while others are evaluations of training programmes.

AUTHORS	COUNTRY	HAVE INVESTIGATED
<b>Abebe, Lindsay, Bonner &amp; Heck (2010)</b>	USA	How mid-level managers, after having completed a leadership development programme, perceive their training needs.
<b>Arar (2014)</b>	Israel	How mid-level leaders regard the relationship between mid-level school leaders and the headteacher as well as what opportunities they have for promotion
<b>Barnett, Shoho &amp; Oleszewski (2012)</b>	USA	How new and more experienced mid-level managers perceive their job situation
<b>Gurley, Anast-May &amp; Lee (2015)</b>	USA	A two-year leadership development programme developed in collaboration between school and university
<b>Ng &amp; Chan (2014)</b>	China	Mid-level leaders' perception of their training needs
<b>Nicolaidou &amp; Petridou (2011)</b>	Cyprus	Participants' perception of the quality of existing training programmes
<b>Oleszewski, Shoho &amp; Barnett (2012)</b>	USA	Have reviewed research on mid-level managers to ascertain how they are being prepared for the job of headteacher
<b>Pirola (2015)</b>	Italy	How the mid-level leadership function is attended to in Italian schools
<b>Thorpe &amp; Bennett-Powell (2014)</b>	England	How the upper secondary school mid-level managers perceive their learning needs after completing a training programme
<b>Wilson &amp; Xue (2013)</b>	China	Formal and informal learning situations

After asking mid-level leaders how they themselves assess their training needs, **Abebe, Lindsay, Bonner & Heck (2010)** find big differences in the group depending on gender, geography, how many years of professional experience they have as a mid-level leader, whether the school is in town or in the country, whether it is a lower secondary or an upper secondary school. The researchers conclude that the tasks that mid-level leaders perform prepare them only to a small extent for leading a school and conducting school development. Mid-level leaders have largely trivial administrative tasks such as schedule planning, observation of teachers' teaching, student behaviour, meetings with parents and purely technical issues involving the school building. The study concludes that training programmes for mid-level leaders must be flexible and take into account the differences within the group by starting with the *actual* need for knowledge - not the assumed need.

**Arar (2014)** conducted a survey of 27 mid-level leaders in Arab schools in Israel, where the education system is traditional and has a hierarchical administrative structure. In 2007, the *New Horizon* reform was launched. Arar wanted to find out how mid-level leaders perceive their role; what expectations they had for the headteacher; whether they consider their job as a career path and what personal characteristics they believe are needed to work on the job. Traditionally, the mid-level leader has been the school caretaker, with various day-to-day tasks determined by the headteacher. After the reform, they have been responsible for reform implementation, school development and innovation. This has created tensions between the mid-level leaders and teachers, but the mid-level leaders interviewed believed that the job had become more professionally interesting after the reform.

The interviews show that unclear job definition and complex tasks make it difficult for a mid-level leader to develop - both as a leader and a professional. The mid-level leaders are concerned about their authority and expect the headteacher to support them - particularly if teachers bypass them and to directly to the principal when they are dissatisfied with something. When asked what qualifications they think a mid-level school leader should have, they replied that academic authority is important to gain respect among teachers. Good mid-level leaders are good project managers; they can organize, establish and maintain collegial relationships; they can listen and talk, know the law and regulations and appear trustworthy and have integrity. Mid-level leaders need guidance at work and expect the headteacher to be available, attentive, empathetic, supportive and inclusive. In particular, they emphasize that the headteacher must include them in strategic assessment work.

Most of all, they would like to work independently with fixed tasks, such as mentoring teachers, various projects and assessment of teachers' teaching.

**Barnett, Shoho & Oleszewski (2012)** conducted a study over a period of three years that included 103 mid-level leaders in lower and upper secondary schools in Texas. Interviews were conducted to reveal what mid-level leaders perceived as the biggest challenges in the job; what they were best and worst prepared for and what needs to be in place to enable them to do a good job. Data was analysed to reveal differences and similarities between 37 mid-level leaders who had brief job experience and 66 who had been in the job for more than three years. The researchers found no major difference between the groups, and conclude that workload and task management can explain the challenges that mid-level leaders face. Traditionally, the most important task of the mid-level leaders has been to lessen the burden on the headteacher, and tasks have mostly been delegated to them ad hoc. Many mid-level leaders would rather be involved with academic tasks than keep track of students, yet few mid-level personnel actually do academic work. Some researchers wonder if this might be due to a lack of necessary knowledge and expertise, and suggest that participate in courses and programmes of continuing education for teachers. Other researchers point out that mid-level school leaders should spend more time in the classroom and audit teaching – so they can more easily have conversations with teachers about what they have observed. A third suggestion is that mid-level school leaders get mentors who can help them develop their skills as pedagogical leaders.

JOB CHALLENGES CITED BY BOTH NOVICES AND MORE EXPERIENCED MID-LEVEL LEADERS
Workload and how to allocate sufficient time
Matters involving pupils
Questions from parents
Questions from teachers and other staff members
Issues pertaining to teaching
Expectations they have for themselves and others
Expectations from others

The worst problem for everyone, both new and more experienced mid-level school leaders, was the workload and allocating sufficient time. The next challenge was conflicts involving students; discipline and attendance in particular were perceived as difficult to deal with. They often felt that they had to make decisions based on a weak factual basis. Disgruntled parents were also frequently mentioned as a wear-and-tear factor, as well as teachers' reluctance to change their teaching. Experienced mid-level school leaders reported somewhat more frequently than new leaders certain challenges related to teaching tasks. These were matters associated with assessment, the use of data and analysis, implementation of programs and overview of teaching in the school.

New mid-level leaders felt well prepared to work with people, establish relationships, guide teachers, and take care of students. Few felt they were well prepared for legal issues, data analysis and problem solving, but believed that they mastered special education and testing, had the necessary leadership skills and could communicate with students and parents. They felt ill-prepared to deal with conflicts and work with people, but said there were many job demands they didn't really understand (especially related to teaching) and they needed organizational understanding and leadership skills if they were to be able to do the job properly.

Although some mid-level school leaders said they enjoyed working with teacher assessment and observing teachers' teaching, many did not feel prepared for such tasks. One third (32%) of the new mid-level school leaders and 21% of the more experienced were not prepared for such tasks. This is a somewhat disturbing finding, in light of the strong expectation that this is the area the mid-level leaders can contribute the most. Concerning the question of what it takes to do a good job, three qualities were identified:

- 1) emotional intelligence;
- 2) flexibility;
- 3) positive relationship with other people.

Mid-level leaders highlighted the importance of having an open mind, being adaptable, treating people equally and fairly. When asked what they considered to be important professional qualities, they answered leadership skills, communication skills, relationship skills and organizational knowledge.

One inconsistency was detected in the material. While 38% of the new mid-level school leaders and 21% of the more experienced stated they were not well enough prepared for tasks related to teaching, these were not mentioned by new (5%) and experienced (8%) as important competencies preparing them to lead pedagogical work. Instead, they emphasized generic competencies such as leadership, relationship and communication skills along with organizational understanding. In the survey, they expressed little concern about assessment, implementation and professional issues such as teaching and data analysis. At the same time, these topics were mentioned as areas they did not know enough about. The researchers ask whether it is unclear to them that they are responsible for contributing towards enhanced learning outcomes in school. The study confirms previous studies showing that mid-level school leaders spend a lot of time and energy on administrative tasks, and that these detract from professional tasks. The high consensus in the responses of new and experienced mid-level leaders may also indicate that being a mid-level leader does not change much over time.

**Gurley, Anast-May & Lee (2015)** present a two-year training programme for mid-level leaders, developed in collaboration between a university and a school district in the USA. Because several headteachers were approaching retirement age, the course was designed to motivate mid-level leaders to apply for the position as headteacher. The programme consisted of monthly half-day sessions with emphasis placed on educational development work, personal management skills, teaching methods, data analysis, strategic resource utilization and work in networks. The programme was designed to support mid-level leaders who had shown interest in professional development aimed at strengthening their leadership skills and teaching them how to contribute to processes for professional development. After two years, 33 participants had completed the programme. Twelve participants dropped out for various reasons; eight were offered headteacher positions while they were taking the course. Six participants plus six of the eight who were given headteacher positions were interviewed, along with leaders at the level of the district and the programme. The study was aimed at revealing whether participants developed better leadership skills, whether they became better qualified for headteacher positions and if the programme met their expectations. Across gender and age, participants reported that what they had benefited most from during the course were the informal network meetings and collegial discussions that provided insights and ideas that they could use in their own practice. Collegial cooperation and being able to talk with or become aware of resource persons was highlighted as an important benefit from the course. The participants report a generally improved understanding of roles and believe that the programme has provided them with a better overview of the school organization, enhanced their leadership skills and self-esteem and improved their ability to collaborate and to conduct networking.

**Ng & Chan (2014)** believe that school leaders are disillusioned, that there may be problems arising as a result of failing job motivation and recruitment. On this background, they looked more closely at what is expected of mid-level leaders and what their training needs are. The study was conducted in Hong Kong; data were collected via questionnaire (N=106) and interview of six mid-level leaders (two line managers, two academic leaders and two with other leadership functions) who participated in the programme and possessed extensive experience. The researchers found that most mid-level leaders stated they liked their job, but were unhappy with the opportunities for promotion. At the same time, they did not want to become a headteacher. Over 30 per cent of the survey's respondents said that parental cooperation was difficult, and more than 50 per cent indicated that the job requirements they encountered were confusing. In the interview, this was exemplified as follows: *"we can't make decisions and have little leeway to do anything beyond what the headteacher demands. Nevertheless we are criticized by colleagues and parents"*(p. 876). A total of 34.9% reported that parental cooperation was difficult. In the interviews, the mid-level leaders described themselves as relationship builders and a bridge between the teachers and the headteacher. They believed that an important part of their job was to help the headteacher implement reform initiatives. One informant said that this might be difficult because *"most teachers don't like being bothered - they already have enough to do"* (p. 880). Closer analysis of the answers shows that they had

not been aware of the difference between management, governance and implementation. The researchers therefore recommend that training programmes build on a thorough needs analysis and that they are targeted.

**Nicolaidou & Petridou (2011)** have examined new school leaders' views on a training programme they implemented in Cyprus. Data were collected via questionnaires and interviews.

PARTICIPANTS (N=257)	TYPE OF SCHOOL	PROGRAMME TOPIC
171 mid-level managers	Upper secondary school	<ul style="list-style-type: none"> <li>Educational leadership</li> <li>Assessment and evaluation</li> <li>Discipline and health issues</li> <li>General pedagogy</li> </ul>
35 headteachers	Upper secondary school	
51 headteachers	Primary School and Lower Secondary School	

The category discipline and health issues was perceived as the most useful. This could be because new school leaders, especially mid-level school leaders, often have to deal with student behaviour problems. Here's how one of them describes their work: *"It's a myth that mid-level leaders have a say on policy issues. We only have administrative tasks, such as recording absences and skipping school, writing reprimands etc. This takes so much time and attention that there is neither time nor energy left to try out what we learn in the programme"* (p. 730). The participants also commented that the programme was heavy on theory: *"We didn't get to use examples from our schools; nor did we get a case to comment on - not even a hypothetical scenario. You can't have leadership training without practical exercises. I had expected that we would design and test out a plan for school development, as an ongoing project"* (p. 731).

The category of educational leadership was perceived as being of medium importance among mid-level leaders, while there were different perceptions among the headteachers in lower and upper secondary schools on the assessment and evaluation category – a discrepancy which may reflect different assessment practices in school teams. The mid-level leaders rated the general pedagogy category as very important, while it was less important for the headteachers. A total of 80% of participants believed that the programme helped develop good school leaders. Almost half believed that such training programs should include mentoring because it is very important that new principals and mid-level leaders can rely on experienced colleagues with whom they can discuss school-related things in a friendly and informal manner. They also believed that training programmes should last at least one year (65%) and 42% think they should lead to a qualification equivalent to a master’s degree. The researchers conclude that better harmony is needed between the programme’s content and the participants’ learning needs and that practitioners must therefore be involved in the preparation of leadership programmes.

In a literature review<sup>84</sup> **Oleszewski, Shoho & Barnett (2012)** present research on how mid-level leaders are prepared for the job, the offers they get pertaining to professional development, what their roles and responsibilities are and how they are socially incorporated into the job. One main impression is that mid-level leaders attend to important functions in school management, but that they lack a clear job description and often have tasks delegated to them on a day-to-day basis, making them an underutilized resource in schools and not preparing them for the job of headteacher. If the position of mid-level school leader is to serve as a career path, the work that mid-level leaders do must in fact support competence development. In the articles reviewed, mid-level school leaders normally have the following three main tasks:

- Pupil follow-up
- Academic tasks related to teaching
- Personal tasks

There are indications in the research that mid-level school leaders do not feel well enough prepared for the job, that they do not have the necessary managerial skills and do not feel qualified to take over in the headteacher’s absence. They are prepared to a small extent for the position, and get little systematic competence enhancement. It also appears that many headteachers do not regard the mid-level school leaders as future headteachers. When mid-level school leaders are asked, they state that they need expertise in assessing teachers’ work, personnel issues, didactics, law, finance and budgeting, handling emergency situations and accidents etc. There are many local programmes, and they contain topics such as guidance, relationships, regular feedback on the job that the course participants do, what it is like to work in a system with increasing responsibility for professional development. Having a mentor is considered the most important measure to support mid-level leaders’ competence enhancement.

84. The researchers have reviewed articles, book chapters and theses published during the period 1970-2011

The literature review shows that social incorporation into the position of mid-level school leader is characterized by chance. While some mid-level leaders hold purely administrative positions, others work mostly with professional/academic issues. Because mid-level leaders largely have their duties assigned by the headteacher, the position of mid-level school leader can be described as a *mosaic of shared responsibility*. Through their job, they learn what is expected of them and how to conduct themselves. It appears that being a mid-level school leader and being a teacher are two completely different things. Many mid-level leaders find that they gradually distance themselves from teachers and lose their identity as a teacher. While some encounter “practice shock”, others find the transition easier. Some people find that they “must” distance themselves from teachers because they are expected to be *street level bureaucrats*<sup>85</sup>: first-line representatives for the management in implementing education policy.

WHAT MID-LEVEL LEADERS SPEND THEIR TIME ON	
Pupil follow-up	Enforcing good conduct, making sure rules are respected
Personal tasks	Planning, organising meetings, recruiting substitute personnel etc.
Academic tasks	Dialogue partner with teachers concerning teaching and assessment

Uncertainty related to unclear job description makes mid-level leaders frustrated; They feel overworked and find it difficult to prioritize. Many say that they would like to have spent more time working to support teachers’ teaching, but few do this, and only when they are specifically asked to do so or personally ask for professional duties themselves. Mid-level leaders who spent most time on professional work reported a more positive workday because they felt that what they were doing had an impact on the development of the school.

**Pirola (2015)** describes changes in the Italian education system after the Lisbon Treaty, under which autonomous schools have replaced a centrally controlled, bureaucratic system. Autonomous schools are expected to be flexible, open and accessible, having responsibility themselves for their performance. Unlike many other countries, Italy does not have a tradition of mid-level leaders on the school staff. In autonomous schools, however, someone must execute necessary leadership functions, and teachers have been given new duties in addition to their traditional core tasks. Teachers with additional functions are considered important resources in most schools. The tasks may be a) administrative, b) student follow-up, c) related to the teaching or d) project coordination. However, teachers who accept such additional tasks have no formal specialization, and do the work in addition to their own teaching. Teachers with additional functions can act as mid-level school leaders or persons with academic responsibility. Because there is little to gain – financially and career-wise – from taking on additional tasks, teachers are most likely motivated by personal-professional development. According to Pirola (2015), the Italian education system has not developed a system for

85. Lipsky, M. (1971). Street-level bureaucracy and the analysis of urban reform. *Urban Affairs Quarterly*, 6(4), 391-409.

specialization and competence enhancement. The school is not organized as a professional community in which everyone works together to achieve pedagogical goals, but consists of two groups that coexist: administration and teachers. The fact that experience alone is recognized as a qualifying factor weakens and humbles the profession rather than strengthening it.

**Thorpe & Bennett-Powell (2014)** report on a project in England, in which 33 mid-level school leaders answered an online survey. 60% of respondents were women and 40% men, and they were in the age range of 30-40. Participants in the study often had very vague assessments of their own training needs and answered non-specifically to the questions. The needs that were recurrent in the survey were team management, how to allocate sufficient time, better understanding of how things are connected and how they could take responsibility for the work of others. The most interesting and paradoxical finding in the survey was that respondents believed that they needed more training in the areas that they had previously reported they knew most about and mastered best, especially how they could help increase students' learning outcomes and improve teachers' teaching.

In a literature review, **Wilson & Xue (2013)** find three related paradigms that complement and nuance each other in the research on training of school leaders. They can be listed as follows:

BASIS IN THEORY	VIEW ON LEARNING	IMPLICATIONS FOR PRACTICE
<b>Situated learning</b>	Action (practice) and learning are invariably linked	Learning takes place through social interaction, concrete experience, observation and reflection on what has been observed, and active experimentation. Cooperation in the practice community makes it possible to agree on good solutions to problems that the professional group must continually deal with.
<b>Expansive learning</b>	Learning is considered <i>expanding</i> cognition, not a linear development.	This notion of learning places the learner in the centre; it is based on autonomy and self-determination and is adapted to individual needs and interests. It's about ascertaining how, as a professional community, one is to deal with common problems. Individual learning integrates with learning in the organization
<b>Critical reflection</b>	Learning takes place through critical reflection about investigative activities.	School leaders must develop critical thinking by reflecting on their own actions and the political and institutional context in which they serve as leaders. In this way they can become better leaders. This assumes a system of professional learning in which one identifies and questions baseless assumptions, understands how to overcome obstacles and develops strategies for organizational development.

Little research done on leadership development programmes and scant evaluation of programmes developed and tested means that the knowledge base for developing new programmes is weak. The programme for school leaders has long contained information on legislation and the intent of reforms so as to ensure the good implementation of reforms. The programmes have been administered from the top down and have not taken into account that school leaders need to develop skills in problem solving and critical thinking. Today, however, we need school leaders who are visionary strategists, who have the courage and ability to transform the system and mobilize all relevant actors in a concerted effort to help teachers become self-reliant. Wilson & Xue (2013) interviewed ten school leaders in various types of schools; among these were six mid-level school leaders. The data were analysed in the categories of formal and informal training opportunities. All the informants had participated in courses where theory occupied a large portion of the programme. While some found it difficult to see how theory could be beneficial in practice, others thought they had benefited greatly from reading books and articles.

Everyone liked that the programmes took school-based practices as their point of departure, and three activities were particularly positive: school visits; the fact that experienced and successful school leaders were invited to give lectures and the opportunity to work case-based and to practise problem solving. Some believed that it might have been helpful to visit elite schools with a good reputation and very good results, while others found that these schools only showcased a façade. The informants were concerned that it was so very difficult to implement the latest education reforms due to the poor connection between curriculum reform and an obsolete exam system. Participants believed that the programme placed too little emphasis on the school's educational work since problems of this kind were not addressed. The interviews revealed major differences between schools in terms of both finance and competence and showed that the participants had different training needs.

Many were of the opinion that there was too little time for workplace learning, and that the programme had many opportunities that were not adequately exploited. They prefer to participate in professional networks, collaborate on case tasks and have the opportunity to experiment in their daily practice. Many found the courses too tightly controlled; they regretted not having opportunities to reflect critically and felt that their own needs and priorities were marginalized.

### Summary 3.4

The studies investigating the training needs of the mid-level leaders corroborate the impression of a professional group that daily perform an endless number of necessary practical work tasks. The researchers ask if this is good resource utilization and whether mid-level leaders should instead spend their time on tasks that can promote development and innovation in schools. In several articles, the researchers point out that many mid-level leaders are uncertain, suggesting that this may be due to vague job descriptions. At the same time, this uncertainty may be due to the fact that they do not have a clearly defined area of responsibility, or that they do not have the necessary expertise to fully perform the entire range of tasks that they are expected to achieve. Some studies revealed interesting inconsistencies in mid-level school leaders' answers regarding what areas they need training in. For example, they may state that they lack competence and need training in areas that they previously, in the same survey, had claimed to master well. They may also say that they are unhappy with the opportunities for promotion, but at the same time state that they do not want to become a headteacher. Experience has high status and is considered very important but at the same time, studies reveal great similarities between new and more experienced mid-level leaders, suggesting that there is no significant *cumulative* development of experience, knowledge and expertise with the passage of years. There is also a tension in the material between professional knowledge on the one hand and the need to develop generic skills on the other. Many mid-level leaders find that they need generic skills (management, communication, relationship building, conflict management, etc.) and organizational understanding because they expected to act as a link between different actors in the school - to "oil the machinery", so to speak. A recurrent finding is that mid-level leaders rely heavily on the headteacher, from whom they expect (but do not always receive) support, and that they want a mentor that they can ask when they are unsure. The pattern that emerges, therefore, is that the job of mid-level school leader is more personal than professional, and that experience is the main source of knowledge in the development of their professional competence.

### Implications for course design

- The courses must take into account that mid-level leaders are not a homogeneous group. They have many different work situations and different needs
- The research does not find that new mid-level leaders have training needs that differ from those of leaders who are more experienced
- Courses should be rooted in the workplace
- The courses must challenge participants as to whether experience alone is a good enough source of knowledge if they are to contribute more in the school's educational work and lead the teaching profession

### Summary Chapter 3

The research that is reviewed leaves an impression that mid-level school leaders are a diverse group with different needs. At the same time, the studies show striking similarity and many common traits - both within the group and across national borders and types of schools. The similarities stem from the fact that the headteacher is normally who decides the work tasks that the mid-level leader is to perform, and that during a normal, the mid-level staff attend to very many of the practical work tasks. Because the job is not defined with clear responsibilities on the school's organizational charts (as is the case, for example, at universities and colleges where there are vice rectors for teaching, research, innovation etc.), the job is also not delimited. Therefore, the tasks that mid-level leaders actually do may vary even from day to day. A common feature of the tasks is that they are practical and technical/ administrative in nature, and to a very limited extent related to the school's professional work. Another interesting feature is that mid-level school leaders' training needs do not appear to be affected the number of years they have been in the position. Many of the articles included conclude that rethinking is needed pertaining to the position of mid-level leaders, and it is understood that the distributed perspective on leadership may have enhanced the understanding of the school as an organization, although it does not contribute substantially towards solving specific problems in school. Perhaps this is because the distributed perspective lacks a theory of action. Studies that have examined professional learning communities say much about what *should be done* to enable collaboration and professional development. However, the advice they provide takes little account of structures and forms of organization in schools and may therefore be difficult to implement on the basis of permanent change. The learning communities described are also more characterized by dialogue and conversation with the goal of confirmation than by critical, scrutinizing professional learning. To a strikingly great extent, *experience* seems to be the mid-level leaders' most important knowledge base. Very many studies find that the mid-level leaders themselves report that they benefit most from a mentor who is a more experienced leader that is able to provide advice and tips, corroboration and nuances as well as act as a discussion partner in a confidential and informal atmosphere. The studies give the impression that these are systemic patterns in schools.

**Implications for course development.** The studies show that the development programme for school leaders must have a generic part that takes up a) personal and b) structural topics. In the part that is a) *personal*, it is a matter of increasing participants' self-awareness, allowing them to practice relationship skills such as taking the other person's perspective, understanding how to deal with loyalty conflicts and what characterizes good conflict management etc. The part that addresses b) *structural* topics deals with, among other things, what it means to work in and lead an organization; what it means to participate and contribute in a management team, the relationship of responsibility between management and employees, reporting and line responsibilities, budgeting and finance and the relationship between the organization and its surroundings.

In addition to the generic part, there is a need for a section specific to the area of expertise that the middle manager will cover. In the education sector, it is partly a question of being able to interpret and understand the implications for the school of national and international policy design, the relationship between policy and profession, the relationship between central intentions and local adaptation options. All school leaders must also know the laws, regulations and system of agreements, curricula and guidelines. They need to know recent research in education, have a plan for how research is to be used in the school, know what is contained in data about the school, how performance data should be interpreted and the information is used to develop learning processes so that school practices become self-renewing.

Leadership development programmes for mid-level school leaders must, *firstly*, help mid-level leaders to prioritize tasks and show them which pitfalls they must avoid when managing their time. Matters relating to time allocation are affiliated with role clarification and job expectations (what things are more important than others). New mid-level leaders can learn from more experienced leaders how to cope with the pressure caused by ongoing incidents involving students and adults in the organization. *Secondly*, the programmes must help mid-level leaders assess and - through role-playing and job training - develop their personal skills, self-awareness, emotional intelligence and the ability to manage conflicts. *Thirdly*, the programme for mid-level leaders must strengthen their knowledge and competence so that they are able to serve as pedagogical leaders.

Leadership development programmes should be developed and conducted in close dialogue with schools in a region, often through cooperation between the school and universities, where candidates can try their hand at real tasks in natural contexts. The programmes need to address actual problems in schools and help participants understand the practical implications of the intent in reforms. Binding networks must be established before, during and after the group gatherings. Participants must always come prepared for the gatherings and leave each gathering with a new task that builds cumulatively on previous tasks.

## 4.0 Synthesis

In a systematic knowledge review, the synthesis is an analytical process in which the aggregate amount of data from all the included articles is assembled in such a way that it generates *new* knowledge. This systematic review has been conducted to identify what the research says about the work tasks that mid-level school leaders have and the training needs they have. Because the studies unequivocally state that mid-level leaders normally perform practical and fairly trivial tasks, it has been easy to answer the first part of the research question. However, for the second part of the research question - what their training needs are - the studies do not provide a clear-cut answer. This is partly because mid-level leaders' tasks are determined by the individual headteacher and may vary from day to day and school to school, and partly because researchers encounter discrepancies between what the data actually reveal and what they believe mid-level leaders *should have done*.

Research on school management consistently concludes that the hallmark of skilled school leaders is that they have a vision for the school and know how to balance educational and administrative tasks. In the effort to achieve a vision, they prioritize teaching and learning quality and develop learning communities. However, the presentation in Chapter 3 of the included studies shows that mid-level school leaders hardly have time to "balance professional and administrative tasks" because their working days are filled with a wide range of purely operational tasks and everyday support functions that could as well have been done by a janitor, assistants or technical-administrative staff.

Based on the analysed studies, the Knowledge Centre for Education also recommended that courses for mid-level school leaders must help them balance professional and administrative tasks and consequently contain a little bit of everything. However, this will not help solve the main problem, which is that mid-level leaders mainly spend their working hours on necessary work that are difficult to classify as management tasks. If these remain the mid-level leaders' tasks, then courses may be filled with tips on practical solutions and technical methods, and if so, then the question is whether they need courses at all, or whether experienced headteachers and mid-level leaders can train new employees themselves.

If, however, as the researchers argue, and which is also in line with a national ambition to strengthen the teaching profession that was announced already in the Report to the Storting no. 11 (2008-2009) *The teacher – role and education*<sup>86</sup> confirmed by an expert committee that submitted a recommendation for the teacher's role in 2016<sup>87</sup>, and highlighted in the Knowledge Department's National Teacher Education Strategy<sup>88</sup> the mid-level leaders instead contribute to the school's professional development work, then the courses must have a different profile.

86. <https://www.regjeringen.no/no/dokumenter/stmeld-nr-11-2008-2009-/id544920/>

87. <https://www.regjeringen.no/contentassets/17f6ce332c47437c8935d7ccc0a72769/rapport-om-laererroellen.pdf>

88. [https://www.regjeringen.no/contentassets/d0c1da-83bce94e2da21d5f631bbae817/kd\\_nasjonal-strategi-for-larerutdanningene\\_net.pdf](https://www.regjeringen.no/contentassets/d0c1da-83bce94e2da21d5f631bbae817/kd_nasjonal-strategi-for-larerutdanningene_net.pdf)



The choice that must be taken in the synthesis chapter is therefore whether the analysis should proceed based on the actual work situation of the leaders, as described in the studies, or the work situation researchers believe they *should* have.

On this background, the following framework was developed for synthesis work:

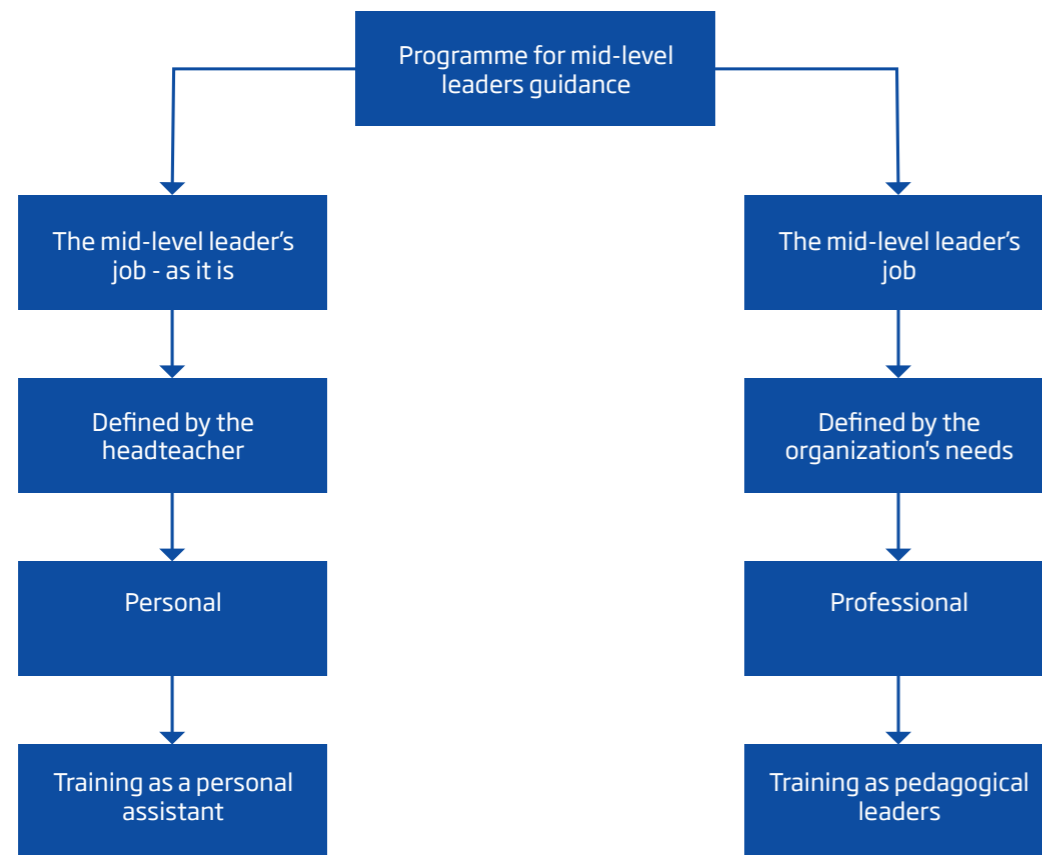


Figure 2. Two types of job content

In the event of a restructuring of the mid-level leader's task portfolio, as researchers recommend, the sector must *first* solve the problem of who will perform all the trivial tasks that school management (principals and mid-level leaders) do today and are found on the left side of the figure. It seems unlikely that anyone can manage both a large amount of practical tasks, ongoing contact with teachers, pupils and parents, attend to their own teaching, report to the headteacher and at the same time take responsibility for development and renewal in the school. It should be ascertained whether other professions work in this way, and it is questionable whether it is responsible professional practice to allow this to continue.

There is no disagreement in the research that leadership programmes must contain generic leadership skills. The challenge, however, is how *the professional part* of the programme should be organized. To shed light on this issue, therefore, we provide a summary overview of some central characteristics of professions, as a necessary introduction to the next phase of the synthesis.

## Characteristics of Professions

The research on professions is extensive and characterized by various discussions of delimitations and concepts, about developments and about the suitability of the term profession. When it comes to characteristics of professions, however, there is a general consensus that the occupational groups called professions have<sup>89</sup>:

- a) Lengthy education and a *certification* scheme ensuring that unskilled people cannot exercise the profession and that those who do not work according to accepted practice of the profession may be excluded from the profession.
- b) A common *knowledge* base from research and experience constitutes a foundation for the profession's exercise of discretion. The professional collective takes responsibility for renewing and maintaining the knowledge base. It is agreed that certain knowledge is valid knowledge, and the profession itself develops standards for good professional practice.
- c) Adherence to a *community mandate*, that is, the profession helps people and provides the services the community needs.
- d) A *collective* working form with *joint responsibility* for the quality of the profession's work. Agreement that professions have complex and heterogeneous work tasks that are best solved jointly and *in accordance* with *professional ethical guidelines*.

Since there is no guarantee that locally produced knowledge is correct and useful, professional knowledge is required to be produced in a form that can be visualized and shared with other members of the profession so that it can be examined critically. It is common to assume that the professional knowledge base consists of knowledge from two main sources, research and recognized good practice that the profession, with the aid of discretion and ethical assessments, can adapt to the needs of students, clients and users<sup>90</sup>. A prerequisite for professional cooperation is that knowledge is public and in a form that enables it to be communicated in the professional community.

In the case of courses for mid-level school leaders, points b), c) and d) will be relevant to examine more closely. However, although point c) is highly relevant for the design of programmes for mid-level leaders, this topic is not highlighted in the included articles. The analysis therefore goes into what characterises the mid-level leaders' knowledge base (b) and how they work with knowledge (d).

89. Hiebert, J., Gallimore, R., & Stigler, J. W. (2002). A knowledge base for the teaching profession: What would it look like and how can we get one? *Educational researcher*, 31(5), 3-15.

Molander, A. & Terum, L. I. (Ed.) (2008). *Profesjonsstudier* (Professional Studies). Oslo: Universitetsforlaget.

Darling-Hammond, L. (2013). *Getting Teacher Evaluation Right: What really matters for effectiveness and improvement*. Teachers College Press.

Brante, T. (2013). The Professional landscape: The historical development of professions in Sweden. *Professions and professionalism*, 3(2). Simons, P. R. J., & Ruijters, M. C. (2014). The real professional is a learning professional. In *International Handbook of Research in Professional and Practice-based Learning* (pp. 955-985). Springer Netherlands.

90. Young, M., & Muller, J. (2014). From the sociology of professions to the sociology of professional knowledge. *Knowledge, expertise and the professions*, Routledge, 3-17.

## 4.1 The Mid-Level Leaders' Knowledge Base

All the included articles conclude that the mid-level school leaders, instead of doing what they do, should engage in the school's educational development work, such as taking part in teachers' professional learning, observing teachers' teaching, giving them feedback on how to improve it, helping them implement reform initiatives, etc. If this is to work as intended, the mid-level leaders need a meta-perspective of the teachers' work, knowledge *about* the work, not only practical knowledge about how specific tasks should be performed in a purely technical and practical manner, but also why the tasks should be done specifically in this or that way, what alternative approaches exist and how they can be adapted to different contexts.

Therefore, it is interesting to look into what characterizes the middle leaders' knowledge base - what knowledge they are based on in the exercise of their profession? As part of the synthesis work, the articles were uploaded in Nvivo 11 and data was extracted using the keywords *experience* and *research*, which are key sources of knowledge in the professional knowledge base. The analysis revealed that in many as 27 of the articles, *experience* was referred to as an important source of knowledge for mid-level leaders, while the word *research* was mentioned in only five of the 34 articles - but then not as a supplementary source of knowledge. The word *research* was used in other contexts such as someone conducting research on the programmes or that courses and programmes should be based on both experience and research. After an in-depth analysis of the data extracts, four categories of experiential knowledge were identified. These are presented here.

### 4.1.1 The importance of experiential knowledge

The 27 articles that deal with experience as a knowledge source refer to experience in different ways, and four categories can be identified in the material: 1) Lengthy experience 2) Practical experience; 3) Shared experience and 4) Lack of experience.

#### 1) Lengthy experience

In several of the articles, the importance of *lengthy* experience is highlighted. The researchers observe that when informants in their studies talk about promotion to leadership positions in schools, focus is mainly on the number of years of experience rather than other qualifications. Although mid-level school leaders are a heterogeneous group and the studies show major differences in terms of requirements for a mid-level leader (age and number of years of experience), there is a general perception that experience in the school is not only important, but an absolutely necessary prerequisite to be able to serve as a mid-level school leader. Some researchers ask whether candidates who become mid-level school leaders with under five years of teaching experience actually have good enough qualifications to function as educational leaders. Interestingly enough, when it comes to pedagogical leadership tasks, it is pointed out that the shorter the teaching experience the mid-level leader has, the less time

they spend on pedagogical leadership tasks. At the same time, the researchers also find that mid-level school leaders with several years of experience tend to engage in day-to-day tasks, while those with fewer years of experience have a greater interest in leadership tasks related to the school's pedagogical work.

#### 2) Practical experience

Practical experience is described and understood slightly differently in the studies analysed, but across them, there is a consensus that practical experience is very important for the work of the leaders. In 15 of the 34 included articles, practical experience is attributed importance, such as job experience, teaching experience, experience from school more generally, experience from participation in learning, professional and practice communities, internship or training context. When the researchers analyse their findings, they also find that the informants emphasize the importance of experience and personal qualities for job performance. They think that experience can be developed and strengthened and that skills are developed through experience. They are concerned about how they can use their past experience in their job as a mid-level school leader and point out that leading pupils is different than leading colleagues.

#### 3) Shared experience

Many studies have looked at how mid-level leaders can enhance their competence through *sharing* experience. For example, participation in a practice community can help individual participants learn from the experiences of others and thus increase their understanding. Discussing issues in practice communities provides moral support and can inspire new ideas, contribute towards finding solutions to their own and others' common problems, and to become aware of resource people who can contribute valuable ideas and support for their work.

Various guidance practices such as mentoring, coaching and shadowing are referred to as useful and positive leadership development activities and are thought to be both able to prepare the mid-level leaders at work and support them on the job. Mentoring, for example, can help enhance mid-level school leaders' competence as pedagogical leaders by acting as a bridge between theory and the practical job situation. Shadowing, close observation of the practices of others, is also recommended in the research. While the academic part of a training programme presents theory, the experience in schools, along with experienced headteachers, yields credibility and relevance. It is argued that the mid-level school leaders, through observation and reflective dialogue, can link their past experiences to what they have learned in the course. Many claims are made in the research pertaining to what one can achieve by sharing experiences, but no empirical examples of this actually working as intended are offered.

#### 4) Lack of experience

The articles also find that mid-level leaders *lack* experience in key areas such as being able to lead development and innovation work; to provide teachers with learning-enhancing feedback on teaching and pedagogical practice; special education; planning processes; activities that occur outside of teaching such as assessment of data sources, use of data and data analysis; professional teaching knowledge and pedagogical leadership. It also appears that brief experience can negatively affect the mid-level leaders' sense of security in the job; likewise, mid-level leaders with little teaching experience feel that they do not have the confidence, expertise or experience needed to work as a pedagogical leader.

In summary, this review shows a strong belief in experience as a source of knowledge, a conviction that lengthy experience is important in order to do a good job and that one learns best by sharing experience. At the same time, the analysis shows that the mid-level leaders feel that they *lack* knowledge and expertise that is essential if they are to be able to function as professional leaders and carry out tasks related to the school's development work. Interestingly, their interest in pedagogical leadership tasks diminishes over time. None of the articles questions the strong confidence in experience among mid-level leaders or explicitly addresses the need to supplement experience with multiple sources of knowledge. Several of the studies mention the need for a mentor, and the researchers point out that mid-level leaders feel secure when they have an experienced mentor with whom they can discuss in informal surroundings. The synthesis shows unequivocally that experience is considered not only a more valuable source of knowledge than research, but as the only relevant source of knowledge. There is no information in the studies on how experience accumulates and (aside from the number of years in the job) on what distinguishes a more experienced midlevel school leader from a less experienced one.

The studies show that most mid-level school leaders and headteachers are recruited from the<sup>91</sup> practice field and that they consequently have the same knowledge as the teachers they lead<sup>92</sup>. To reveal what the studies say about working methods in schools, the next part of the synthesis is based on the framework presented in Figure 2, *Two types of job content*, where the binary poles personally and professionally were identified.

91. Elmore, R. F. (2000). Building a New Structure for School Leadership. Albert Shanker Institute. <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.103.7688&rep=rep1&type=pdf>

92. Lortie, D. (1987). Built In Tendencies Toward Stabilizing the Principal's Role. *Journal of Research and Development in Education* 22(1) 80-89.

#### 4.1.2 Personal - Professional

The studies show that the mid-level leaders' work situation is *personal* in the sense that it is the headteacher who defines their work duties and delegates authority to them. Some researchers find that the headteacher may tend to delegate and control, and still take back delegated authority back by allowing teachers to bypass the mid-level leader and go directly to the headteacher when they deem the matter important enough. Thus, the mid-level leader's authority also becomes person-related and not position-related. In addition, the mid-level leaders' knowledge is developed through personal conversations with more experienced colleagues. This pattern, which appears in the analysis of data, is described in Table 1 below:

PERSONAL JOB SITUATION	PROFESSIONAL JOB SITUATION
<ul style="list-style-type: none"> <li>Work tasks delegated ad hoc, by the headteacher</li> <li>Mid-level school leaders are leaders only in relation to the headteacher</li> </ul>	<ul style="list-style-type: none"> <li>The job is about following the standards and work processes that the profession has developed, concurs with and continuously renews and improves</li> </ul>
PERSONAL AUTHORITY	PROFESSIONAL AUTHORITY
<ul style="list-style-type: none"> <li>Authority is something the headteacher gives and takes</li> </ul>	<ul style="list-style-type: none"> <li>Authority comes with education, qualification, specialization and collective, continual improvement</li> </ul>
PERSONAL KNOWLEDGE	PROFESSIONAL KNOWLEDGE RELATIONS
<ul style="list-style-type: none"> <li>Knowledge comes from your own and colleagues' experience</li> </ul>	<ul style="list-style-type: none"> <li>Common knowledge base assessed and validated in the professional community</li> </ul>
PERSONAL KNOWLEDGE RELATIONS	PROFESSIONAL KNOWLEDGE RELATIONS
<ul style="list-style-type: none"> <li>A more experienced colleague who acts as a mentor is the preferred source of knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Professional knowledge has two key sources: Research and recognized good practice</li> </ul>
PERSONAL LEARNING COMMUNITY	PROFESSIONAL LEARNING COMMUNITY
<ul style="list-style-type: none"> <li>Knowledge is exchanged (between mentor and mid-level leaders) through conversations in secure and informal surroundings</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge is developed, presented, criticized and improved in the professional community</li> </ul>

Table 4. The relationship between a personal job situation and a professional job situation

## 5.0 Closing, Conclusions and Knowledge Gaps

The synthesis has shown that mid-level school leaders value experience above knowledge gained from research. Studies that have examined the work situation of mid-level school leaders and their training needs do not refer to research as a relevant source of knowledge for professional practice. Nor is the use of research mentioned as a competence that mid-level leaders should develop.

The consistent image that research portrays is that experience has greater credibility as a source of knowledge than research. Mid-level school leaders say they learn more from sharing experiences than studying theory that lacks meaning: "Listening to other people's experiences, how they've experienced things, was very useful, better than theory, because when you hear about the actual experiences, then you understand things better" (Bouchamma & Michaud 2011, p. 410). After attending courses, participants are known to say that they were taught theory in the courses, but that being able to observe experienced leaders in schools provided credibility and relevance and that the "experts" (researchers and other external actors) should visit schools so they can understand the situation in reality.

The synthesis has shown that when experience is the only source of knowledge for the mid-level school leaders' professional practices, the mid-level leaders' knowledge also becomes *personal*. The knowledge is not available to the community, embodied in the experience of the individual professional. Because this knowledge is not made visible in a shared format, it cannot be assessed and discussed by professionals collectively. The synthesis also reveals that experience is often linked with *confirmation* and that mid-level school leaders are not used to dealing with research as a source of knowledge that can challenge and generate new questions.

The systematic review of knowledge has shown that there are resources in the school that are currently being poorly utilized and that could be used to strengthen the profession and to improve and develop the school. Finally, it should be noted that three factors shown by the knowledge summary have an impact on the usefulness of courses for mid-level school leaders. These are the headteacher, the mid-level leadership function and the structure and organisation of the school.

### Headteachers

The portrayal of the headteacher in the articles is interesting. Several studies point out that teachers regard the headteacher as the school's *real* leader, and it appears that mid-level school leaders, teachers and headteachers agree on this. Some find that the headteacher both delegates and controls. If they feel that the matter is serious enough, teachers may bypass the mid-level school leader and go directly to the headteacher. This becomes a problem if the headteacher allows this to happen. From the perspective of the mid-level leaders, one almost gets the impression that the headteacher is perceived as a kind of CEO and that the mid-level

school leaders serve as a protective administrative layer between the top position and all the disruptions in the school. Several informants pointed out that it is difficult to be accepted as a school leader. Teachers want leadership, but they don't want to be led - and they challenge authority. They want freedom to design their work situation as they wish, but at the same time they want help and support in performing their duties.

It is unclear what leeway mid-level leaders have to act on their own - they are only leaders relative to the headteacher. Therefore, many mid-level leaders have to ask about *everything*. They struggle to find their proper place, and their possibilities to influence work in the school are dependent on the headteacher's leadership strategy and the way the headteacher designs their job. Headteachers also do not regard the mid-level leaders as future headteachers. In sum, all of these aspects undermine the authority of the middle leaders.

It appears that courses for mid-level school leaders must place the relationship between the headteacher and the mid-level school leaders high on the agenda. The research shows that when the headteacher and the mid-level school leaders work together well, they are able to make a great, concerted effort to improve the school. The prerequisites, however, are that the mid-level leaders must have the wholehearted support of the headteacher, the job tasks of the position are defined in the school's organizational chart and the headteacher has a carefully considered plan for what the mid-level school leaders are to do.

### Mid - Level School Leaders

Researchers point out that mid-level leaders have a work situation neither builds competence nor prepares them for the position of headteacher; researchers recommend taking a new look at the reasons for having mid-level school leaders. Mid-level school leaders want and are expected to help improve school teaching and learning, but they are unsure whether they have the preconditions to do so and rarely have time because of their many other tasks. Abrahamsen (2017) quotes one informant who said that he sometimes thinks of himself as a teacher who is assumed to be a leader, i.e. *really* a teacher, or a teacher *more than* leader.

Teaching appears to be a day-to-day activity with a weak knowledge base. Many headteachers and mid-level school leaders lack the necessary expertise to be able to provide teachers with good feedback that promotes learning about their teaching. However, if mid-level school leaders are to be responsible for providing feedback on teachers' work, headteachers must also possess this expertise. It is difficult to imagine anything else than that the teaching profession and teaching profession's leaders share the same knowledge base, which they actively use as a common frame of reference.

While several studies have examined how learning communities can support participants' professional learning, fewer studies have scrutinized how the teaching profession and school leaders can be *challenged* so that the school as an organization can develop an infrastructure

for sustainable learning. In Report to the Storting no. 30 (2003-2004) *Culture for Learning*, it is recommended that schools develop into learning organizations<sup>93</sup>. However, the learning communities described in the included studies bear more of a resemblance to discussion forums that confirm the status quo than to venues for critical, investigative development work.

## Structure and Organization

Educational institutions have traditionally had a flat structure and are described as loosely connected<sup>94</sup>. More specifically put, there has historically been little contact between administrative leaders, who have mainly managed the work of the school, and the teachers, who have mainly taught. Some researchers also believe that hierarchical, bureaucratic structures in schools can make it difficult to successfully develop<sup>95</sup>.

Several studies point out that mid-level leaders' work tasks depend on the individual headteacher, which can explain the wide variation in mid-level leaders' duties. Some headteachers regard leadership as distributed practices in schools and will encourage mid-level school leaders to act as pedagogical leaders, while other headteachers view leadership as top-down administration and governance - which may mean that they want help in maintaining peace and order in the ranks. While the researchers conclude that mid-level school leaders should be more involved in the school's educational development work rather than performing all the daily, trivial tasks, no one has asked whether the headteacher thinks it is acceptable to bind the mid-level school leaders' time to trivial tasks. It may appear odd that the headteachers do not have greater academic aspirations for the schools they administer, but perhaps many headteachers perceive themselves as mid-level school leaders and implementers of the incessant flow of new political initiatives.

In the political discourse about schools, as it is expressed in policy documents and media reports, almost all attention is now on *teachers'* efforts, which may have diverted attention from school leadership. It becomes a question of whether responsibility for the school's development is *perceived* as unclear because it is distributed among several stakeholders inside and outside the organization. Elmore<sup>96</sup> points out that the school, the church and the military are institutions that recruit leaders strictly from their own ranks. This is not necessarily negative, but when the school, unlike most professions, lacks both a system of certification and a common knowledge base, the consequence is that the organization's leaders possess and know the same knowledge as the staff. If we compare this to the main finding in the systematic knowledge review, which is that *experience* is the central source of the mid-level leader's knowledge, the school's knowledge base appears to be more *personal* than professional.

In all the articles, researchers discuss the big differences in mid-level leader's tasks and argue that this type of position must be better defined and more clearly described so that it becomes a more attractive job with good career opportunities. Specifically, Oleszewski et al. (2012) suggest that a model of shared leadership (team) be introduced in which mid-level leader's are deputy headteachers having defined responsibilities, similar to the organizational structure of universities and colleges. In such a model, it will be easier to define the mid-level leader's responsibilities and sphere of activity and will enable a formulation of expectations for professional self-renewal.

Although schools have undergone major changes in recent decades, they still have a relatively flat organizational structure with a large range of areas for leaders to control and often too few staff members in administrative and technical positions. In such a situation, when «someone» has to take care of the daily operations, it is obviously easy to assign this to the mid-level school leaders.

## A research-like working method in the schools

The paper *The future school* of the Ludvigsen committee<sup>97</sup> highlights four competencies that are required when school content is to be renewed. In addition to subject-specific competence, the pupils need expertise in learning, communicating, interacting, participating, exploring and creating. If students are to develop such skills, the school's principles of working must be exploratory in nature<sup>98</sup>. It is not research on professions alone that calls for investigative, *research-like* working principles when one wants to improve results and renew practices. Similar recommendations can be found in the research on learning organisations, where organizations are considered learning systems<sup>99</sup> and employees are committed to strengthening knowledge and cooperation in the organization while taking into account expectations and demands from the organization's surroundings.

Having reviewing decades of research on organizational learning and learning organisations, Yeo (2005) finds<sup>100</sup> that this research, in short, is about how to increase the organization's ability to *learn to learn*, meaning to adopt and adapt new knowledge to existing knowledge (gathering, storing, and disseminating knowledge), developing action-related knowledge to bring about change, growth and renewal, strengthening teamwork and collaboration and developing culture. Such principles are recognizable from professional research, where concepts such as a knowledge base, professional community and community mandate are used to describe similar ways of working.

93. <https://www.regjeringen.no/no/dokumenter/stmeldnr-030-2003-2004-/id404433/>

94. Weick, K. E. (1976). Educational organizations as loosely coupled systems. *Administrative science quarterly*, 1-19.

95. Mehta, J. (2013). From bureaucracy to profession: Remaking the educational sector for the twenty-first century. *Harvard Educational Review*, 83(3), 463-488.

96. Elmore, R. F. (2000). Building a New Structure for School Leadership. Albert Shanker Institute. <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.103.7688&rep=rep1&type=pdf>

97. <https://www.regjeringen.no/no/dokumenter/nou-2015-8/id2417001/sec2>

98. Schön, D. (1983). *The Reflective Practitioner*. New York, NY: Harper & Collins.

99. Nevis, E. C., DiBella, A. J., & Gould, J. M. (2000). Understanding organizations as learning systems. In *Knowledge, Groupware and the Internet* (pp. 43-63).

100. Yeo, R. K. (2005). Revisiting the roots of learning organization: A synthesis of the learning organization literature. *The Learning Organization*, 12(4), 368-382.

In 1978, Argyris and Schön<sup>101</sup> developed a theory of single-circuit and dual-circuit learning, with related theories-in-use at level 1 and Level 2. Learning in individual circuits is routine in nature and occurs with the help of a level 1 theory-in-use. At this level, the results of an action are evaluated, and if necessary, adjusted. However, the evaluation entails no profound consequences, and work continues to be performed in the same manner. Single-circuit learning is essential in daily working life. Everyone needs a certain amount of routine procedure and predictability to get work done. If, on the other hand, we want to *change* routines and ways of working, dual circuit learning is needed, which is suitable when the goal is to critically examine entrenched patterns of action with a view to changing them. Dual circuit learning assumes level 2 usage theory, which challenges norms and assumptions among members of the organization. The working methods are characterized by individuals taking advantage of the strengths of other members of the organization along with soliciting external perspectives on the work being done. Routine work is challenged; processes are assessed and new investigative activities are initiated. The researchers believe that such systematic investigative, learner, research-like working principles can renew the culture of an organization.

Figure 3 attempts to summarize the professional perspective with perspectives from organizational learning. By starting with Argyris and Schön's concepts of single and dual circuit learning, it becomes apparent that when experience is the only source of knowledge, the result is single circuit learning. Once again, it is necessary to emphasize that experience is both absolutely necessary and good.

The problem arises when experience is the only source of knowledge and when schools lack a system by which to consolidate experience knowledge, assess it and agree on what is good and less good experience-based knowledge. If entrenched working methods are to be challenged, one must therefore work investigatively, or in a research-like manner, which requires dual-circuit learning, as the figure illustrates.

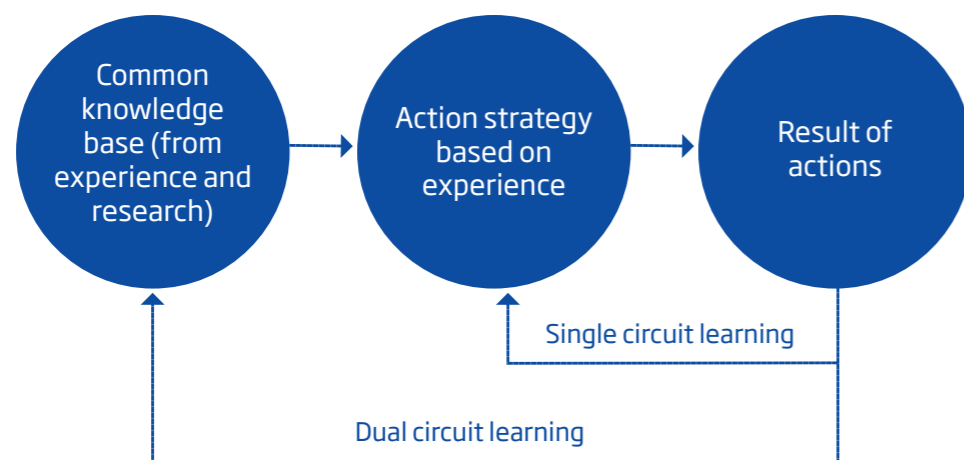


Figure 3. Learning in single and double circuitry (inspired by Argyris and Schön, 1978)<sup>102</sup>

101 & 102. Argyris, C., & Schon, D. (1978). Organizational learning: A theory of action approach. Reading, MA: Addison Wesley.

When considering Figure 2 Two types of job content in conjunction with Figure 3 Learning in single and double circuits, a pattern emerges. As the research describes the mid-level school leader's job, it is characterized by routine problem solving according to the principles of single circuit learning. Mid-level school leaders work to maintain existing rules, structures and systems in schools, and they base their choice of action on experience as a source of knowledge. On the other hand, if mid-level school leaders are to work as pedagogical leaders, as the research says they should, they will have to engage in dual-circuit learning, which is oriented precisely towards challenging routine work, evaluating work processes and initiating new investigative activities. It is a matter of work tasks of a different nature that can help them to develop a meta perspective on teachers' practices. In a learning organization, the choice of action will be considered in the professional community and supported by knowledge from experience and research, i.e. knowledge generated inside and outside the organization. Active use of knowledge from multiple sources contributes towards creating new perspectives and other questions, which in turn can lead to new and better practices.

Since policy documents have long recommended that schools should work according to learning principles, and there is at the same time an expressed desire to strengthen the teaching profession, it can therefore be recommended that mid-level school leaders, preferably with support in specific case tasks from their own school, learn how to apply such basic principles to professional learning and organizational learning as part of courses.

### Programme Content

In summary, the articles provide the following advice to designers of leadership development programmes or courses for mid-level school leaders:

#### The courses need to address structural issues

- It is necessary to rethink the organization and management of the school
- The course must emphasize the relationship between the headteacher and mid-level leaders

#### Practical advice for course design

- The courses must take into account that mid-level leaders are not a homogenous group. They have many different work situations and different needs
- The research does not find that new mid-level leaders have training needs that differ from those of leaders who are more experienced
- Courses should be rooted in the workplace
- Participants should bring case assignments from their own school/institution that they can practice in constructed learning communities during the course

- The course must provide binding network activities between participants, before, during and after the course
- The courses must have a built-in structure that ensures participants ongoing feedback in the form of guidance activities from experienced headteachers or leadership coaches

### Courses must develop participants' generic competencies

- Mid-level leaders need practice in providing and receiving feedback
- Mid-level school leaders must train in team management and collective leadership forms
- The courses must provide mid-level leaders with varied opportunities to become aware of how to proceed when talking to teachers about their teaching
- Participants must have ample opportunity to discuss matters/issues related to both having a formal leadership position and at the same time attending to development tasks.
- Courses should address how the participants can cope with stressful workdays
- Mid-level leaders need training in cooperation (how to lead discussions, deal with disagreement, tackle tensions, accept others' perspectives and reach agreement in the group)

### Courses must develop participants' professional competencies

- Course programmes must be designed to help mid-level leaders understand how to balance technical tasks with the development part of the job
- A task between course days might be that participants spend a day shadowing principals in the municipality/region. Results from the observations can be presented and discussed during the course
- The courses must challenge participants as to whether experience alone is a good enough source of knowledge if they are to contribute more in the school's educational work and lead the teaching profession'

## 5.1 Knowledge Gaps

The following knowledge gaps have been identified in research about the work situation and training needs of mid-level school leaders:

- More empirical studies are needed to examine whether the school is organized in ways that enable employees satisfy objectives
- Studies are needed to examine what leading schools actually involves, studies that connect the governance of schools with activities in schools and problems in schools
- Studies are needed that compare the education sector's organization with the ways other large social institutions are structured, organized and managed
- More studies are needed to compare teachers with other professional groups
- Studies are needed to examine how the teaching profession and school leaders can be *challenged* so that the school as an organization can develop an infrastructure for sustainable learning

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## Appendix 1 Search Strings

### **Search String ProQuest - 02 November 2016 (Education Collection, ASSIA, IBSS, Education Database, ERIC, Psycinfo)**

(TI,AB(«assistant head\*» OR «assistant principal» OR «co-ordinator\*» OR «department head\*» OR «department manag\*» OR «deputy head\*» OR «deputy principal» OR «inspector» OR «middle leader\*» OR «middle manag\*» OR «middle tier» OR «phase leader\*» OR «subject leader\*» OR «team leader\*»)) AND (TI,AB(«school\*» OR «education\*»))

**Topic search** ProQuest (Education Collection, Psycinfo, IBSS, ASSIS) Date of search (TI, AB ("Professional Learning communit \*" OR PLC OR team OR manag \* OR motivation OR "learning outcome \*")) AND (PUB ("Educational Administration Quarterly" or "Journal of Educational Research" OR "International Journal of Leadership in Education" or "School Effectiveness AND School Improvement" or "Educational Researcher" OR "Management in Education")) Communit \* of Practice

## Appendix 2 Sample data Extracts From Articles and Coding in Nvivo

AUTHORS	DATA EXTRACTS FROM THE ARTICLES	CODING IN NVIVO
Paranasic & Riveros (2015)	There was no common age or years of experience that those interviewed became department head. Within the issue of age and experience, however, there was significant difference as to what the department heads perceived was necessary to take on the role of a department head—and some department heads perceived these to be impediments to them doing their jobs. Not surprisingly, considering there are no policy guidelines, there was no accepted or common idea of how many years of experience should be necessary to be a department head. Tellingly, those who believed they had acquired the job at a younger age, or with fewer years of teaching experience, perceived this to be the cause of some difficulties when they first came into the role. When asked whether she felt she was ready at a younger age for the role of department head, Emily, who actually became a department head in her first year of teaching, thanks to a series of unusual events, reflected: Yes, I did [feel I was ready for the role], because I was so cocky. When you are younger, you think you can handle anything and I felt fully comfortable. I think my principal at the time, he was uncomfortable that I was at the table, because I think he thought I was too young to be there and I hadn't earned my stripes.	Lengthy experience
Barnett et al. (2012)	Often, their lack of experience dealing with master scheduling, teacher appraisal, extracurricular activities, special education, assessment, and data analysis affected their confidence in dealing with individual teachers and schoolwide improvement efforts. Their sense of inadequacy in understanding curriculum and improving instructional practices are evident in their comment: The area that I was least prepared for was that of the curriculum. In attaining my master's degree we were required to take a Curriculum and Instruction course; however, many districts adopt different curriculums and set a variety of scope and sequences for them. Being an instructional leader requires us to have a clear understanding of what our district expectations are. (Experienced assistant principal #53)	Lack of experience

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