



The Two Towers: The Quest for Appraisal and Leadership Development of Middle Leaders Online

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Abstract

This paper sets out to examine the role of middle leaders and their quest for effective appraisal and leadership development online—the two towers. Research that focuses on the role of middle leaders, in terms of their appraisal and leadership development, suggests there is a crisis in the ‘middle’. Currently, middle leaders do not have access to a specific national programme that focuses on leading from the middle. Moreover, they are not supported by those who are able to assess the gap in their leadership needs and provide the appropriate development. A lack of effective appraisal of middle leaders, and significantly deficient leadership development, suggest the need for an immediate call to action. Consequently, this paper explores the need for an online middle leadership programme that provides accessibility for these leaders in the unique contexts of their organisations, schools, and kura.

Keywords: middle leadership; online professional learning; middle leaders; leadership development; performance appraisal

Introduction

The role of school middle leaders continues to increase in both scope and workload. Middle leaders are responsible for the pedagogical leadership that impacts on student learning, yet they often feel unprepared for this complex role. When combined, appraisal and leadership development have the potential to equip leaders to carry out their role more effectively. Research conducted by Bassett (2012) and Robson (2012) highlighted that neither appraisal nor leadership development were being used to evaluate middle leaders’ ability or to develop their practice, yet middle leaders are expected to appraise and develop their own teams. This paper presents the need for an online middle leadership programme that is accessible to these leaders in the unique contexts of their organisations, schools, and kura.

Appraisal is intended to provide accountability and development for leaders (Cardno, 2012), with the end goal of improving student outcomes. In referring to teachers, the latest OECD (2016) report states: “[effective] appraisal . . . will deliver best results if it is linked to professional development . . . based on a culture of professional inquiry . . . to improve practice” (Schleicher, 2016, p. 56). This proves challenging when appraisal is ineffective or, worse still, not happening at all. Missed opportunities for ongoing professional conversations and leadership development, alongside the conflicting purposes of appraisal, result in the perception that appraising middle leaders is an undervalued and ineffective practice (Cardno & Robson, 2016). To ensure that appraisal is meaningful and empowers middle leaders, it should be embedded in the culture of the school, have a clear purpose, and provide coherence between policy, process, and the practice itself (Cardno & Piggot-Irvine, 1997). While middle leaders conduct appraisals of their own

teams, principals need to ensure that those leading in the middle also receive appraisal and leadership development.

Leadership development is a specialised form of professional development focusing on building the capacity of leaders (Cardno, 2012). Leadership development can take the form of training, education, or support and should be context specific (Bush, 2008). Although the role of middle leaders has expanded (Fitzgerald, 2009), there is still a lack of leadership development to equip them with the required skills. Due to the challenges and complexity of middle leadership, it is imperative that middle leaders are provided with leadership development to enable them to effectively perform their role. Bassett (2016) asserts that the “middle leader’s role demands a set of leadership and management skills which requires specialised knowledge and training” (p. 106); hence the need for the provision of a specific middle leadership programme.

The role of middle leaders

In the more than two decades since the introduction of educational reforms that led to self-managed schools in Aotearoa New Zealand (Wylie, 2012), there has been significant expansion of the role of senior educational leaders (Cardno, 2012). Principals have become chief executive officers with direct responsibility for managing their schools, and are also accountable for the quality of teaching and learning (Brundrett, Fitzgerald, & Sommefeldt, 2006). A survey of secondary principals confirms that their workload has not eased (Wylie, 2013). Consequently, responsibilities and leadership tasks that were once considered the domain of senior leaders have been distributed or delegated to those at other levels of the school hierarchy (Adey, 2000; Fitzgerald & Gunter, 2006). As a result, the middle leader’s role has evolved from that of subject specialist to having responsibility for monitoring and evaluation, contributing to wider school policy, evaluating teaching programmes, developing organisational relationships, ensuring quality assurance, and liaising with senior management (Bennett, Woods, Wise, & Newton, 2007; Fitzgerald, 2000; Glover, Miller, Gambling, Gough, & Johnson, 1999).

In Aotearoa New Zealand, middle leaders are identified by a variety of terms such as Head of Department, Head of Faculty, middle manager (Bennett et al., 2007; Busher, 2005) and, more recently, middle leader (Blandford, 2006; Fitzgerald, 2009). Middle leaders receive a time allowance and financial management units as remuneration. This recognition is based on the school size and the set of responsibilities (Fitzgerald, Youngs, & Grootenboer, 2003). Busher and Harris (1999) assert that middle leaders are the “interface between the whole school domain and that of the classroom” (p. 6). This means the role of middle leaders in the school structure is unique; they are not solely teachers, yet they are not part of the senior leadership hierarchy (Fitzgerald, 2000).

The Ministry of Education (2012) outlines an extensive range of tasks that middle leaders are expected to carry out. These include leading pedagogical change; ensuring that teaching staff understand their role in implementing the school’s vision and policies; providing culturally responsive leadership; working to establish reciprocal relationships implicit in the Treaty of Waitangi; working with students’ families, whānau, hapū, iwi, and caregivers to share information and solve problems; providing a safe and orderly school environment; managing and appraising teachers; mentoring and coaching other leaders; leading and participating in professional development; building professional, trusting relationships; resolving conflicts; and promoting innovation. This exhaustive list highlights the increasing expectations put upon middle leaders and confirms the view of Dinham (2007), who contends that the role of middle leader is complex, intensive, and challenging.

These additional leadership tasks, for which middle leaders are now responsible, also create significant challenges. One of the most significant is that of carrying out their role in the time

allocated to them. Despite the allocation of extra non-contact time to undertake leadership functions, middle leaders often claim this time is not sufficient to perform their role effectively (Wise & Bennett, 2003). The Post Primary Teachers Association (PPTA) (2015) states middle leaders are left “without enough time and energy to do an excellent job as both a leader and classroom teacher”. This echoes earlier research by Fitzgerald (2009) who found middle leaders were overburdened with compliance tasks to such an extent that the role dominated their time.

Another significant challenge for middle leaders is evaluating their colleagues’ performance (Bennett et al., 2007). Appraisal of teachers is intended to benefit both the individual and the organisation by affirming that performance expectations are being met, and by identifying areas of development for improvement (Cardno & Piggot-Irvine, 1997). Paradoxically, although they have responsibility for appraisal (Fitzgerald et al., 2003) their “extra management responsibility [means] they are less likely to have sufficient time to effectively enact their school’s appraisal process” (p. 102). In fact, Fitzgerald and Gunter (2008) observe that while middle leaders lead others, they are still positioned below the senior leaders, and they question whether power has been equally distributed.

The increased responsibilities of middle leaders make it necessary for them to gain new knowledge and skills to effectively carry out their role. Despite acknowledgement that effective leadership requires specific professional development (Cardno, 2012), many middle leaders perceive themselves to be ill-equipped and under-prepared to meet the challenges of their role (Dinham, 2007). Similarly, when middle leaders move into their new leadership roles they may experience uncertainty (Fitzgerald, 2009). Bush (2008) contends that “being qualified for the very different job of classroom teacher is no longer appropriate” (p. 29). He asserts there is a moral obligation to develop those who move from the role of teacher into leadership positions. The broader concern is that the training and development of school leaders continues to be inadequate, and is focused at a system level to the detriment of providing individual leadership development (Lovett, Dempster, & Fluckiger, 2015). In Aotearoa New Zealand, leadership development has been aimed at principals and those aspiring to be principals (Brundrett et al., 2006; Bush, 2010), whereas leadership development for middle leaders has not been forthcoming at a national level (Chetty, 2007). In turn, the onus is on senior leaders of organisations, schools, and kura to provide adequate leadership development to equip their middle leaders to effectively carry out their complex role. Therefore, the purpose of this paper is to explore the notion of a specific online middle leadership programme that would enable middle leaders across Aotearoa New Zealand to meet these challenges and undertake their roles effectively.

The practice under scrutiny: The two towers of appraisal and leadership development

This paper draws on two separate qualitative research studies (Robson, 2012; Bassett, 2012) that examined appraisal of middle leaders and leadership development of middle leaders respectively. As experienced secondary-school middle leaders, these researchers had received neither effective appraisal nor leadership development. The lack of research was the impetus for conducting this research to examine middle leaders’ experience (or lack of experience) of appraisal and leadership development. Middle leadership has the potential to significantly affect student learning outcomes and yet, without leadership training and preparation, and without personal appraisal, the multifaceted role is fraught with challenges.

Appraisal of middle leaders

Appraisal’s dual purpose of accountability and development has the potential to mutually benefit individuals and educational organisations. In Robson’s (2012) small-scale qualitative study in three large secondary schools, in which there were at least 15 teachers across three schools who

held designated middle leader positions, 26 respondents completed an online questionnaire containing both open and closed questions, and five middle leaders participated in semi-structured interviews. Each school's personnel policy and appraisal process were analysed concurrently, to capture as much reality as possible. By employing triangulation and multiple methods of gathering data, the accuracy of the study was strengthened "to shore up the internal validity" (Merriam, 2009). Using an interpretive approach, the open-ended questions and interview data were coded thematically in broad categories that were already established from recurring themes in the literature on appraisal and leadership development. The findings of the research exposed that middle leaders perceive they are not effectively appraised by their senior leaders. There was a notable absence of evidence of appraisal practice that specifically targeted improving the practice of middle leaders. In addition, analysis of each school's documentation highlighted a lack of specific mention of appraisal for middle leaders, or who should appraise them. Many middle leaders felt frustrated at the lack of personal appraisal, particularly as they had to prioritise their time to conduct meaningful appraisals with their own staff. For the majority of middle leaders interviewed, appraisal was merely a compliance exercise, if it happened at all. This frustration was expressed by two of the middle leaders interviewed.

One stated that appraisal was:

to check that I am doing the job ... a tick-box exercise, with little obvious appraisal of me as a leader.

The other felt their appraisal as a middle leader was not viewed as important:

The importance seems to be from middle management down, not middle management up.

Rather than addressing both purposes of appraisal, a tick-box, compliance approach has resulted in the practice being perceived as undervalued and ineffective. This research emphasises the need for principals to develop and implement appraisal policy and practice that specifically targets middle leaders. Building a school culture of improvement where professional conversations are formalised, alongside provision for middle leadership development, will lead middle leaders to feeling valued, developed, and empowered.

Leadership development of middle leaders

Bassett's (2012) research set out to examine middle leadership development practices in five secondary schools by examining the perspectives of eight members of the boards of trustees, senior leaders, and middle leaders. For the purpose of this study, middle leaders were defined as subject heads, heads of departments, and heads of faculties. Because only one research instrument was used, the sample needed to be large enough to provide valid data. A qualitative online questionnaire was sent to 145 school leaders, and 60 questionnaires were returned (eight from boards of trustees' members, 15 from senior leaders and 37 from middle leaders), providing an overall response rate of 41 percent. Respondents were asked their views about the role and challenges of middle leadership in their schools, and the purpose and provision of middle leadership development. Findings reveal middle leaders are expected to perform an extensive range of leadership functions, including leading the curriculum, developing staff in their teams, and implementing school-wide goals. Furthermore, most respondents at all levels emphasised the goal of improving student results. However, nearly half of the middle leaders in this study did not feel supported or adequately trained to carry out their role.

Their frustration was expressed in comments such as:

There is an expectation that you know how to do it all and are able to cope regardless of training.

It seems expected that you know what you are doing and often terms like ‘sink or swim’ and ‘trial by fire’ are used when talking about going into leadership roles.

Despite middle leaders’ perceptions that they were not well supported, most respondents had participated in some form of leadership development in their current school. This contradiction of perspectives may be explained by the way leadership development is conceptualised in schools. The majority of respondents in this study expressed the need for specific, contextualised, and supported middle leadership development to enable middle leaders to face the challenges of their role. It’s possible that the leadership development received by these middle leaders did not fit their definition of leadership development and, consequently, they felt they had not been developed. This clearly highlights the need for a specific leadership development programme that is contextualised and relevant to each middle leader.

In the absence of a national middle leadership programme, the responsibility falls to senior leaders to implement formal, planned leadership development for middle leaders to ensure they have the capability and capacity to undertake their complex role. Evidence suggests this is not happening in many schools. Therefore, the quest for a leadership programme that is specifically designed for middle leaders is urgent. An online programme would provide accessibility and ubiquity.

The quest for appraisal and leadership development of middle leaders online

Although the Robson (2012) and Bassett (2012) studies were conducted in 2012, the perception of a crisis in the middle remains. The OECD report (Schleicher, 2011), recent Education Review Office reports (2014), and the PPTA (2015) working paper reiterates the need for robust school improvement measures that include appraisal and effective leadership development. The continuing lack of leadership development programmes that specifically target middle leaders creates a sense of urgency for equipping middle leaders with the skills they need to enact the ever-increasing demands of their leadership roles. An online middle leadership programme could locate effective leadership development in the practice of meaningful appraisal, to ensure middle leaders are valued and empowered to carry out their role.

For a leadership development programme to be successful (whether it be online, in-school, or with a tertiary provider), it must be underpinned by key principles. Significant Aotearoa New Zealand research (Timperley, Wilson, Barrar, & Fung, 2007), identified seven effective contexts for promoting professional development. These are: an extended period of time to engage in learning opportunities; access to external expertise to provide support and challenge; engagement with learning opportunities; a challenge to prevailing discourses in order to surface underlying assumptions; an opportunity to participate in a professional community of practice; informed by, and consistent with current research findings; and active support from school leaders. The conception of an online middle leadership programme takes heed of this research, and acknowledges the potential challenges of working in an online environment.

Regardless of how much time and effort goes into planning and creating a programme, Martin (2009) suggests that there can be challenges in gaining interest and tapping into the participants’ intrinsic motivation. He suggests that the lack of face-to-face contact, teacher presence, and technical support are partly to blame for this, alongside the learners’ lack of experience in an online learning environment, and their ability to be self-regulating. On the other hand, Nichols (2016) found that learners are capable of, and willing to, engage in an online learning environment with no significant negative effect on their learning. However, in terms of benefits, an online programme provides ubiquity, connectedness, and flexibility, regardless of geographical location, size of organisation, and so forth. Such a programme has the potential to

address the challenge of lack of time identified by middle leaders because it could enable leaders to participate anytime, anywhere, in their own context.

When crafting an online learning experience, the capability of the participant and the role of the facilitator both need to be considered. To ensure a high quality programme which is responsive and empowers its leaders, it is essential to have an awareness of how to develop and nurture social presence, engagement, and retention online. Gedera, Williams, and Wright (2015) assert that “motivation can be a prerequisite for learner engagement. . . . Student motivation and engagement are closely related elements of student learning that can have an impact on learning outcomes” (p. 14). A professional inquiry presented at the Distance Education of New Zealand (DEANZ)¹ Conference by McLaren, Robson, and Whiting (2016), explored the steps taken by facilitators to engage with both the learning design team and the participants. These steps involved ongoing technical support; building meaningful relationships; and evaluating activity logs to ensure participants were connected, involved and working collaboratively to foster an engaging, vibrant learning culture. As a result, retention rates and completion numbers were higher than for the equivalent course from the previous year. Consideration of these factors in both the design and facilitation of an online middle leadership programme would therefore contribute to empowering middle leader participants to be engaged and supported.

An online programme

We propose an online middle leadership programme of four modules, providing participants with adequate time to engage in a series of iterative learning cycles in which they examine their own assumptions about leadership. The modules will explore four key areas: Self, Team, Organisation, and Community.

1. **Self** will focus on participants’ leadership roles and their perspectives of leadership, how they relate to others, their place in their organisation, and how their views compare with current leadership research.
2. **Team** will encourage participants to critically examine their roles as leaders of their teams, and consider the part they play in creating a positive culture for teaching, learning and leading effectively.
3. **Organisation** will examine the wider organisational issues in which middle leaders contribute. Participants will explore middle leadership through a strategic lens so they can step back from their immediate context to consider the bigger picture.
4. **Community** encourages participants to evaluate their place in the larger professional community of school leaders.

According to Bush (2010) there is an “increasing recognition of the importance of culture and context in designing leadership development programmes” (p. 115). By undertaking the four modules as outlined, middle leaders will be equipped to explore not only their own context and culture, but that of their school and their wider learning community.

The four modules: Self, Team, Organisation, and Community will be designed to support the professional learning of each participant by being responsive, inclusive and contextually relevant. A combination of interactive webinars, provocations, online discussion forums, and curated resources will challenge middle leaders and provide them with a supportive middle leadership development programme. Middle leaders may also wish to undertake individual mentoring. In an online environment, participants will have access to a field of expert facilitators and lecturers, and have authentic opportunities to forge connections with communities of leaders across Aotearoa New Zealand.

¹ DEANZ is now the Flexible Learning Association of New Zealand. The name change was ratified at this conference in 2016.

A learning framework

Drawing on Van Velsor and McCauley's (2004) model of leadership development, a learning framework has been adopted.

This comprises three elements:

1. Assessment—the analysis of data to identify gaps between capacity and performance.
2. Challenge—the range of experiences leaders engage with that take them out of their comfort zone and encourage them to question their own practice.
3. Support—the people who provide reassurance, coping strategies, and an attentive ear to leaders undergoing difficult experiences.

These three elements provide a suitable framework in which to locate middle leadership activities.

In each module participants will undertake an assessment of their current capabilities to identify gaps in their knowledge and practice.

The challenges will be part of an ongoing, rigorous, and robust middle leader inquiry. The purpose of inquiry is not to prove, but to *improve*, practice, and this will be no exception. As Timperley, Kaser, and Halbert (2014) state: “innovation floats on a sea of inquiry . . . and curiosity is a driver of change” (p. 3). In this context, participants are encouraged to inquire (with curiosity) into their own leadership practice, with a view to challenging their existing skill set, assumptions and capabilities. Sinnema and Robinson (2007) assert that an inquiry-based, reflective appraisal approach has a positive effect on teaching, leading, and learning.

Figure 1 conceptualises a model of middle leader inquiry. It situates an iterative cycle of middle leadership learning within a balanced strategic approach of appraisal and leadership development—the two towers—ultimately for improvement.

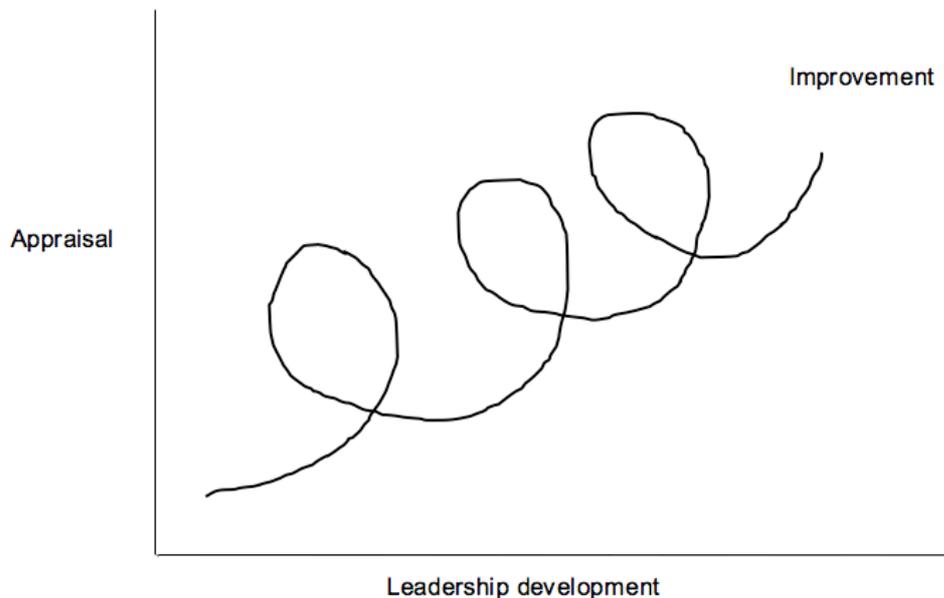


Figure 1 Middle leader inquiry model

By using a collaborative spiral of middle leader inquiry, participants will be empowered to improve their leadership practice by building on their learning, and so ultimately affecting teaching, leading, and learning outcomes. Consequently, by focusing on the two towers of appraisal and leadership development, the online middle leadership programme aims to build middle leadership capability and capacity in schools, kura, and across communities of learning.

Conclusion

Middle leaders believe that, while their role is rewarding, it is both multifaceted and demanding. A balanced approach to middle leadership appraisal and development will ensure that, at the crux of the matter, there are improved student outcomes for all. The practice of leading from the middle is currently perceived as undervalued, undeveloped, and unprepared. Middle leaders need to seek opportunities to ensure they are both held accountable and professionally developed. The proposed online middle leadership programme is the answer. Until a national policy is implemented, the onus is on school leaders to realise the value of those leading in the middle. By providing an online middle leadership programme that is accessible, ongoing, contextually relevant, and inclusive, middle leaders across Aotearoa New Zealand will be equipped with the knowledge, dispositions, and skills to inquire into their own practice, while being held accountable and, ultimately, developed specifically as a middle leader (Robson & Bassett, 2017).

The quest is there for the taking.

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