

**An examination of the issues facing first time  
subject leaders during their first year of  
appointment in New Zealand secondary schools.**

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**A thesis submitted in partial fulfilment of the requirements for the  
degree of Master of Educational Leadership and Management**

**Unitec Institute of Technology, 2008**

## **ABSTRACT**

This research examines the issues faced by first time subject leaders as they endeavour to come to terms with the nature of the subject leader's roles. The subject leaders' role has undergone change in recent times, and is becoming increasingly complex. The tensions inherent in the role, and the support and development that they receive are explored.

A small scale qualitative study is used to examine the issues facing first time subject leaders in New Zealand secondary schools. Interviews with six first time subject leaders from two urban secondary schools in New Zealand provide in depth data. Questionnaires from senior leaders in each school together with supplied documentary evidence provide further evidence and enable triangulation to validate the findings.

The findings of this research indicate that the role of subject leader has not been clearly defined in the participating schools. This lack of clarity has caused problems for first time subject leaders in understanding and developing for the role. At the same time the subject leaders experienced tensions between the new role and their teaching, and between the role of leader and being a colleague. A major issue for first time subject leaders was the lack of structured support and development for the role. Lack of role clarity, poor planning and unstructured support are seen as barriers to accessing development for the role. A lack of time internally to provide development opportunities and limited provision by external providers were also identified as issues for first time subject leaders.

Conceptualising these findings in a theoretical model enables the underlying causes of the issues to be identified. This research indicates the need to provide greater clarity in the role definition of subject leader, and to ensure

more, and more effective professional development opportunities for subject leaders.

## **ACKNOWLEDGMENTS**

The completion of this thesis has been a large task made easier with the support of a number of people who deserve acknowledgement.

The secondary teachers study awards committee for granting a study award to enable me to complete my Master of Educational Leadership and Management degree.

The principals and subject leaders who were willing to give up some of their valuable time to participate in the research.

My family for their support and encouragement through the years of study to get to this point.

My supervisor, Dr. Jenny Collins, for the encouragement, guidance, expertise that has helped me shape the research, and for confidence in me that has kept me going.

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## Table of Contents

<b>Abstract</b> .....	<b>ii</b>
<b>Acknowledgments</b> .....	<b>iv</b>
Table of Contents.....	v
List of Tables.....	vii
List of Figures.....	vii
<b>Chapter One – Introduction</b> .....	<b>1</b>
Introduction.....	1
Rationale .....	2
Conceptualising the research.....	3
Scope of this research .....	8
Thesis organisation.....	9
<b>Chapter Two – Literature Review</b> .....	<b>11</b>
Introduction.....	11
Subject leaders .....	11
Subject leader’s role .....	13
Role tensions.....	17
Professional and leadership development .....	23
Facilitators of and barriers to development .....	29
Conclusion.....	29
<b>Chapter Three – Methodology</b> .....	<b>31</b>
Introduction.....	31
Ethical issues.....	42
Conclusion.....	43
<b>Chapter Four – Data Findings</b> .....	<b>44</b>
Introduction.....	44
Demographic data.....	44
Role of subject leaders .....	46
Role tensions.....	52
Coping strategies .....	59
Support.....	63
Development .....	70

A model of the issues facing first time subject leaders .....	81
Conclusion.....	82
<b>Chapter Five – Discussion of Findings .....</b>	<b>83</b>
Introduction.....	83
Role of subject leaders.....	83
Role tensions.....	85
Coping strategies .....	88
Support.....	90
Development .....	92
Conclusion.....	96
<b>Chapter Six – Conclusion .....</b>	<b>97</b>
Introduction.....	97
Tensions for first time subject leaders .....	97
Organisational factors and professional development.....	98
Personal factors and professional development .....	99
A model of the issues facing first time subject leaders .....	99
Implications of findings.....	101
Recommendations .....	104
Summary .....	106
<b>References.....</b>	<b>108</b>
<b>Appendices .....</b>	<b>115</b>
Appendix A: Interview Schedule .....	115
Appendix B: Questionnaire .....	118
Appendix C: Principal information sheet.....	120
Appendix D: Organisation consent letter.....	121
Appendix E: Subject leader information sheet.....	122
Appendix F: Subject leader consent form .....	123

e

**List of Tables**

Table 3.1: Data analysis codes .....36

Table 3.2: Methodological triangulation of data .....40

Table 4.1: Summary of Subject Leader participants  
 .....4

0

**List of Figures**

Figure 2.1: Mintzbergs' model of organisation structure. .... 1

Figure 4.1: Factors contributing to the lack of role clarity .....  
 40

Figure 4.2: Role tensions experienced by first time subject leaders.....  
 45

Figure 4.3: Factors influencing the support for first time subject leaders .....  
 56

Figure 4.4: Factors related to the professional development of first time  
 subject leaders .....  
 61

Figure 4.5: Factors contributing to the experiences of first time subject leaders  
 .....  
 71

Figure 6.1: Factors contributing to the experiences of first time subject leaders  
 .....  
 88



# CHAPTER ONE – INTRODUCTION

## **Introduction**

January 1999, my first day on the job as a subject leader, what was I supposed to do? Who should I ask? How will the staff or students respond? What does a head of faculty do? Too many questions, too few answers. I had been teaching for twelve years, I knew about that. But being a subject leader, a head of faculty with responsibility for some subjects I was not quite so confident about that was different. Over the years I have found my way into the role, grown to understand what was required, even found some professional development opportunities to help me on the way. But it hasn't always been easy, particularly at the start. Of course there were people willing to help and give advice, and others wanting to push their own agenda. I learnt as I went, but is there an easier way? Are the experiences of other first time subject leaders like mine?

In this chapter I set out the background for the research into the issues facing first time subject leaders. I provide the rationale for researching first time subject leaders building on from my own experience. The importance of this research is described with the links to other research and professional practice. I discuss the scope of the research problem with reference to the literature and this leads to a statement of my research aims and questions which shape this research. The context of the research is described, giving details of the characteristics of myself as the researcher and the participant schools and subject leaders. The chapter concludes with a description of the thesis organisation and an outline of the purpose of each chapter in the thesis.

## **Rationale**

The rationale for this research is that subject leaders often have difficulty adjusting to the new role. This was my experience when I was first appointed a subject leader ten years ago, and it is my perception that recently appointed subject leaders face similar challenges to my own experience. Literature on subject leaders also indicates some issues they face, this research will examine the extent to which first time subject leaders experience these issues.

The role of subject leader is complex and encompasses aspects of both leadership and management (Adey, 2000; Bennett, Newton, Wise, Woods, & Economou, 2003; Brown, Boyle, & Boyle, 2000; Fitzgerald, 2000). First time subject leaders often, like me, come to the role without prior experience of leadership or management and face significant issues adjusting to the role (Fletcher-Campbell, 2003).

I found the changing nature of the job, and increasing complexity of the job, meant I struggled with the demands of the job and was sometimes unsure of the job expectations (Fletcher-Campbell, 2003; O'Neill, 2000). Lack of awareness of what the subject leader's role is results in a mismatch between the reasons for individuals applying to be subject leader's positions and the expectations of the job. First time subject leaders expect to have a direct impact on teaching and learning and are not generally focussed on developing careers in leadership and management (Fletcher-Campbell, 2003). This lack of role clarity and mismatch of expectations leads to tensions for the subject leader.

Professional development is seen as important for people appointed to new positions (Rudman, 2002). The literature from England indicates that there is little evidence of provision of professional development for first time subject leaders related to their new role (Adey, 2000; Bennett et al., 2003; Hobbs,

2006) and I found little available to me in New Zealand. There is some New Zealand research into the professional development needs of subject leaders, however not specific to first time subject leaders (Fitzgerald, 2000). The limited research into the professional development of first time subject leaders in New Zealand means that this research will add to the literature and provide a useful basis for further research in the future (Fitzgerald, 2000; O'Neill, 2000).

Examining the issues faced by first time subject leader's in New Zealand secondary schools, including the clarity of understanding the role and the way support and development are accessed, will inform future practice and research. Thus the research has benefits both to the research community and practitioners in New Zealand secondary schools.

### **Conceptualising the research**

This research develops from my experience as a first time subject leader. A brief review of the literature indicated a gap in the research into first time subject leaders. Literature in the areas of subject leadership, professional and leadership development and human resource management provides useful background for my research. This literature is briefly introduced here to establish the nature of the research problem, and reviewed in depth in chapter two.

The literature on subject leaders in schools reflects both a change in the role of subject leaders in recent years and also an increasing understanding of the role (Adey, 2000; Brown, Boyle et al., 2000; Fitzgerald, 2004). This shows that the role is complex and that it encompasses aspects of both leadership and management (Bennett et al., 2003; Kerry, 2005). The role is also seen as a key role in improving teaching and learning in schools as the person remains

close to the classroom (Dinham, 2007; Harris, Busher, & Wise, 2003; Hobbs, 2006).

Traditionally subject leaders have, like me, been promoted from classroom teachers with little regard for any management or leadership training or experience (Fletcher-Campbell, 2003; Organisation for Economic Cooperation and Development, 2007). The teacher has been expected to learn the skills on the job. This has sometimes proved problematic as the teachers' perception of the role, and reasons for taking on the job, may be different from the schools expectations (Collier, Dinham, Brennan, Deece, & Mulford, 2002; Fletcher-Campbell, 2003).

It is now widely acknowledged that subject leaders have a leadership role (Hobbs, 2006; Organisation for Economic Cooperation and Development, 2007). This leadership is increasingly understood in a framework of distributed leadership with the subject leader having responsibility not only for leadership in their own area but also making a contribution to the whole school leadership and management (Harris, 2003; Organisation for Economic Cooperation and Development, 2007). This leadership role is often expressed as being in tension with the accountability and administrative demands of the management aspects of the role (Collier et al., 2002; O'Neill & Flecknoe, 2002). A further tension arises from balancing the demands of the subject leader role with that of being a classroom teacher (Glover & Miller, 1999). Finding ways to resolve these tensions is an issue for subject leaders; however it is not clear from research is how first time subject leaders understand these tensions (Aubrey-Hopkins & James, 2002; Collier et al., 2002; Kerry, 2005).

When I started as a subject leader there was no professional development offered for the role. In recent times there have been moves to provide professional development for subject leaders (Harris et al., 2003). However these have often been taken up by more experienced subject leaders seeking promotion rather than new subject leaders. Training for subject

leaders in England has focussed on the standards for subject leaders and has proved spasmodic (Adey, 2000; Hobbs, 2006). There is no similar provision for training around the *professional standards* for unit holders (NZ Post Primary Teachers' Organisation, 2007) in New Zealand although Fitzgerald (2000) has proposed a curriculum linked to the standard. Fitzgerald (2000) does recommend that there is a need for "a closer analysis of the professional leadership role of middle managers" (p. 74). In general subject leaders have accessed support through informal programmes provided by education advisory services or more recently courses offered by private educational consultants. Some subject leaders enrol in tertiary courses in educational leadership to seek support and development for the role.

Programmes for the professional development of first time principals have been around for some time both in New Zealand and overseas. There are no such professional development programmes for first time subject leaders in New Zealand (Organisation for Economic Cooperation and Development, 2007). There have been moves towards such programmes in England for subject leaders but progress has been slow. In New Zealand first time subject leaders have joined in the informal programmes provided by education advisory services often with long standing subject leaders and not focussed on their specific needs. I remember sitting in such sessions with experienced subject leaders talking above my head.

Professional development has been an important part of a teachers' job for a long time. The research on effective professional development suggests a need for development that relates to practice and allows time for reflection (Piggot-Irvine, 2006; Timperley, Wilson, Barrar, & Fung, 2007). O'Neill (2000) has argued that the role of a subject leader is both complex and situated and so professional development must be individualised. This means that effective professional development has at least some on site component and is ongoing rather than one off. First time subject leader's being new to the role

require professional development (Rudman, 2002), the professional development provided should be guided by the research on effective professional development.

A first appointment to a subject leadership position is often the first time an individual is required to act in a management and leadership role. I had some ideas about what these might involve, but putting these into practice made me realise how little I really knew. It is also from the ranks of middle managers that the future senior leaders and principals of schools will be recruited (Organisation for Economic Cooperation and Development, 2007). For both individuals' career plans and for school succession planning this is an important step (Gill, 2006; Margerison, 1991). As part of a planned process subject leaders need not only to be inducted into their roles, but also into the wider theories of leadership and management (Harris et al., 2003; Woodall & Winstanley, 1998). To provide professional development for first time subject leaders in schools as part of leadership and management development would need schools to view the process as part of a bigger picture (Cardno, 2005).

Gill (2006) identifies barriers to and facilitators of leadership and management development, both relating to the individual and the organisation. Overcoming organisational barriers such as culture and time requires planning for the process. Key individual barriers are lack of self confidence and stress these can be particularly true for those new to an unfamiliar role where the organisational and individual expectations are different. This is the situation facing first time subject leaders who are entering jobs that have much greater complexity than they may have encountered before, and where their own and the schools' expectations may be different (Bennett et al., 2003; Fletcher-Campbell, 2003). Facilitators of leadership and management development are identified as coaching, role models and professional qualifications.

Human resource literature identifies that both formal and informal relationships and processes at work in an organisation impact the provision of support (Rudman, 2002). How a person accesses support for their job also has both formal and informal aspects and these both need to be considered when analysing the issues facing first time subject leaders. The formal part relates to familiarisation with job requirements and organisation policy and procedures (Lashway, 2003; Rudman, 2002). The informal aspect is developed through the relationships and power structures operating within the organisation (Aubrey-Hopkins & James, 2002). My experience was that informal support was willingly given however there was little formal support for the role of subject leader. There can also be gaps between what the school says it requires from the job and what is actually expected in practice. This can prove confusing for first time subject leaders, particularly those appointed externally, as they try to determine what their role is and how they can meet expectations, both their own and the schools'.

The literature has confirmed some of my experiences as a first time subject leader, but still some questions remain. The role of subject leader is a complex and changing role, it has both leadership and management components which creates tensions for the subject leader. There is some research from England into meeting the needs of first time subject leaders (Adey, 2000; Bennett et al., 2003; Hobbs, 2006). There has been research into issues facing subject leaders in New Zealand but there is a gap in the literature on the issues specific to first time subject leaders. This research will help fill this identified gap in research while being informed by the literature from the related areas that has been identified above. While helping to fill the gap in the literature around the issues facing first time subject leaders the research will also provide evidence to support further research in this area.

Since the research is informed by the literature, but fills a gap within the literature an examination of the issues facing first time subject leaders in their

first year of appointment in New Zealand secondary schools is considered a research problem.

### *Research Aim*

To examine the issues facing first time subject leaders in secondary schools during their first year of appointment.

### *Research Questions*

What issues do first time subject leaders experience in their role as a manager of people and resources?

What organisational factors are identified by subject leaders as facilitators of or barriers to the professional development of first time subject leaders?

What personal factors are identified by subject leaders as facilitators of or barriers to the professional development of first time subject leaders?

### **Scope of this research**

Reflecting on the literature review in chapter two and the research questions above led to a qualitative methodology being chosen for this research, as described in chapter three. Qualitative research is usually highly contextual and the context needs to be understood in order to make meaning from the findings. The research methodology, context of the research and the size of this study all put limits on the scope of the research.

As this research is contributing to a master's level thesis it is a small scale study. Only a relatively small number of participants are used in the study, although care has been taken to ensure sufficient data has been collected.

Data for this research was collected from six subject leaders at two large, multicultural, urban secondary schools in a major New Zealand city. The two schools have different curriculum structures; one structured around departments the other around larger faculty groups. Three first time subject leaders from each school participated in the research. Interviews were conducted with each subject leader to find out about their experiences during their first year in the role. Each school also completed a questionnaire and supplied documentary evidence of the subject leader's role and development. The findings from the research are presented in chapter four.

## **Thesis organisation**

The thesis is organised in six chapters.

Chapter One is an introduction to the thesis.

Chapter Two reviews the international and New Zealand literature relevant to the issues facing first time subject leaders in New Zealand secondary schools. This includes understanding the role of subject leaders and how this has changed over time. The difficulties and tensions experienced by subject leaders are discussed and the features of effective professional, leadership and management development are reviewed.

Chapter Three describes the processes used to conduct the research. A brief review of the history of educational research places this research within the qualitative, interpretive tradition. The chapter then describes the qualitative research methodology and research methods. The way the data are analysed to identify the issues facing first time subject leaders is overviewed. The relevant ethical principles are also outlined.

Chapter Four provides an overview of the findings of the research. Data have been coded and described. The chapter illustrates the themes with

quotations from the interviews, questionnaires and documents analysed to show where there is substantial agreement between participants, or where the participants are split in distinct groups. The main themes relate to the subject leader's role and the tensions within that role, strategies used to cope with the demands and tensions, the support available to first time subject leaders and the development of first time subject leaders.

Chapter Five analyses the findings from chapter four with reference back to the literature reviewed in chapter two. Following the themes identified in the findings this chapter considers where the findings of this research are supported by findings from other research, and where this research has identified issues that are not identified elsewhere, or seem to be different to the findings of previous research. This discussion enables the issues facing first time subject leaders in New Zealand secondary schools to be understood within the larger educational research context.

Chapter Six draws conclusions based on the research aim. The implications of this research are discussed and recommendations for further research and practice are made.

## CHAPTER TWO – LITERATURE REVIEW

### **Introduction**

This chapter reviews recent literature relevant to the issues facing first time subject leaders in New Zealand secondary schools. Firstly the term and changing nature of subject leader is explained within the context of New Zealand secondary schools. The increasing complexity of the role and the tensions that this creates for first time subject leaders are examined, particularly as they relate to the leadership and management aspects of the role. The relationship between the school organisational structure and ideas around school restructuring are examined to show the impact that these issues have for subject leaders and their development. In order to inform discussion of the support and development available to first time subject leaders issues around professional and leadership development are examined including the availability of development for subject leaders and what makes development effective.

### **Subject leaders**

The role of subject leader has evolved from, and continues to evolve from, the traditional head of department (HoD) in secondary schools (Fitzgerald, 2000; Kerry, 2005). Changes to the New Zealand schooling sector introduced as part of the education reforms of *Tomorrow's Schools* (Parliament of New Zealand, 1988) in the late 1980s and early 1990s saw greater local administration of education (O'Neill, 2000). The role of the HoD as an administrator of a centrally controlled curriculum changed as they took on more responsibility for developing the curriculum within their own subject area as well as other responsibilities (Fitzgerald, 2000). The curriculum changes

that took place through the 1990s and the rollout of the National Certificate of Educational Achievement (NCEA) a decade later put still more responsibility for curriculum and assessment in the hands of the HoD (O'Neill & Flecknoe, 2002). Many schools took the opportunity to reorganise smaller departments into learning area or faculty groups under a head of faculty (HoF) or head of learning area (HoLA) sometimes giving this group wider school responsibility for coordinating issues such as reporting (Fitzgerald, 2000). The term subject leader has been used in the literature to reflect both the changing nature of the role traditionally designated HoD and to cover the increasing range of titles given to those with responsibility for particular subject or curriculum areas (Aubrey-Hopkins & James, 2002; Glover & Miller, 1999).

As well as being instructional leaders subject leaders are also part of the management structure of the school. Schools are by nature hierarchical organisations although there have been some attempts to introduce flatter organisational structures (Kerry, 2005). O'Neill (2000) argues that educational reforms have increased the managerial and hierarchical nature of schools. Within the organisation subject leaders are found in the middle of the hierarchy, and have been termed middle managers (Busher & Harris, 1999; Fitzgerald, 2004). The position of the subject leader within the hierarchy and the organisation of the school reflect issues of power and authority that need to be considered in looking at the subject leader's work (Brown, Boyle et al., 2000; James & Aubrey-Hopkins, 2003; Kerry, 2005; O'Neill, 2000). As a recognition of their role in the school management hierarchy subject leaders in New Zealand usually receive a payment of between one and four management units, currently NZ\$3800 per annum for each unit, and a time allowance of between one and four hours per week for carrying out their responsibilities (NZ Post Primary Teachers' Organisation, 2007). The work of the subject leader needs to be understood in this context.

## *Recruitment*

Subject leaders are primarily recruited from among the ranks of classroom teachers and often this is their first role with management and leadership responsibility (Fletcher-Campbell, 2003). It also needs to be noted that the subject leader usually retains a significant teaching workload and the subject leadership responsibilities are on top of this workload (Dinham, 2007; Glover & Miller, 1999). There are no formal training requirements either before or after appointment to the position of subject leader in New Zealand (Organisation for Economic Cooperation and Development, 2007). The appointment process relies on the identification of appropriate skills in potential applicants (Fletcher-Campbell, 2003). There is also some evidence that people who are seen as potential subject leaders are shoulder tapped for the role, and it has been suggested that schools could be more purposeful in identifying potential subject leaders in schools (Rhodes, Brundrett, & Nevill, 2008).

The picture that emerges is one of subject leaders who occupy a significant place within the school structure, but whose recruitment is more ad hoc than strategic. This suggests that the first time subject leaders, who are the focus of this research, come into a role with significant expectations of them, but little training or preparation for the role.

## **Subject leader's role**

It has already been seen that the role of subject leader has undergone significant change over the past two decades. This change brought with it increasing complexity to the role of subject leader (Adey, 2000; Brown, Boyle et al., 2000; Fitzgerald, 2000). Although there has been some research into the subject leader's role "the secondary HoD has been under-researched, when

compared with others such as principals and classroom teachers” (Dinham, 2007, p. 64). Notwithstanding this there is plenty evidence about what the role involves and the tensions and difficulties experienced by subject leaders (Collier et al., 2002; Glover & Miller, 1999; Hobbs, 2006; Kerry, 2005; O’Neill, 2000; O’Neill & Flecknoe, 2002; Wise & Bush, 1999). The current research will add to the body of literature related to subject leadership.

The subject leader has both management and leadership responsibilities. Unit holders, such as subject leaders, in New Zealand are expected to meet the dimensions of the *Professional Standards* for unit holders (NZ Post Primary Teachers’ Organisation, 2007). These are resource management, staff and student management and professional leadership. The *professional standards* are a generic document that describes the requirements of unit holders, it is not specific to subject leaders and does not necessarily capture the reality of the subject leader’s work although it does reflect the dual management and leadership aspects of the role (Fitzgerald, 2000). Caldwell and Spinks (1998, cited in Fitzgerald, 2000, p. 72) identify six key tasks as “1. Goal Setting, 2. Policy Making, 3. Curriculum Planning, 4. Resource Provision, 5. Implementation of Learning Programmes, 6. Evaluation.” These categories are again generic but begin to unpack the complexity of the role of subject leader. Fitzgerald (2000) was able to match these with the dimensions of the *professional standards*, the match indicated “the professional leadership dimension of a middle manager’s role is critical in terms of their contribution to the school” (Fitzgerald, 2000, p. 73).

In analysing observations of subject leader’s at work on one day in English schools, Glover and Miller (1999) grouped the activities in to five categories, strategy and planning, teaching and learning, staff, resources and administration. While these categories capture the work on one day they reflect broadly the same range of activities as cited in Fitzgerald (2000). Glover and Miller (1999) found that by far the most time was spent on staff

related activities, followed by teaching and learning, strategy and planning, resources and least time on administration, although they do add a caveat that some coding might not reflect that some activities have a dual role. Further the categories here were decided by the observer not by the subject leader. In other research in Australia, Collier et al. (2002) found that administrative requirements were identified as the most prominent aspect of workload identified by subject leaders, this was followed by teaching and student management issues.

While it is clear that there are both management and leadership aspects to the role of subject leader it is not always easy to classify any one aspect as leadership or management (Fitzgerald, 2000; Glover & Miller, 1999). Management tasks are often seen as administrative including aspects such as resource management, budgeting and record keeping these could relate to resource management dimension of the *professional standards* for unit holders (Fitzgerald, 2000). Other management tasks involve interactions with staff or students such as dealing with student discipline, monitoring implementation of policy and organising or attending meetings. These activities seem to link to the staff and student management dimension of the *professional standards*. Subject leaders recognise the importance of these aspects of the job in maintaining the function of the subject area (Collier et al., 2002). However subject leaders often express frustration both at the amount of time spent on these tasks and the way management tasks place an immediate demand on their time (Brown, Rutherford, & Boyle, 2000; Collier et al., 2002).

Leadership has been increasingly acknowledged as a key part of the subject leader's role. Indeed the nomenclature attached to the role of middle leader, instructional leader, teacher leader or subject leader as opposed to the term middle manager reflects this change in emphasis (Dinham, 2007). Leadership in schools has traditionally been thought of as the domain of the

principal. The key emphasis of the leadership dimension of the subject leader's role is improvement or change; this is the transformational aspect of leadership (Busher & Harris, 1999). Leadership is seen as reflecting the professional side of the subject leader's role as opposed to the managerial aspects. The *professional standards* for unit holders calls this dimension professional leadership (NZ Post Primary Teachers' Organisation, 2007). Leadership aspects of the subject leader's role include planning and implementing curriculum change for improved learning, working with staff to improve pedagogical practice and working cooperatively with whole school strategic planning and implementing this within their own subject area (Fitzgerald, 2000; Glover & Miller, 1999). The evidence from research indicates that this is an area of the job that subject leaders find satisfying (Collier et al., 2002; Hobbs, 2006). The evidence is also that leadership aspects are the part of the role that subject leaders struggle with most. The difficulties arise for two main reasons; one is the lack of time for reflective planning and meeting with colleagues to work on issues for improvement (Collier et al., 2002; Glover & Miller, 1999). The research literature shows that the leadership aspects of the job are time consuming and these aspects have been added on rather than replaced other aspects of the subject leader role (Glover & Miller, 1999; O'Neill & Flecknoe, 2002), this is further discussed in the section on role size. The other is the lack of appropriate skills or professional development for this aspect of the role (Adey, 2000; Hobbs, 2006), which is an issue looked at later in this chapter.

Subject leaders are seen as having a pivotal role in improving student learning outcomes (Brown, Rutherford et al., 2000; Dinham, 2007). The importance of the subject leader is apparent as the differences in effectiveness between subject areas within a school are similar to those between schools (Harris, 2001). The increasing awareness of the subject leader's importance in school improvement has seen the further delegation, or distribution, of leadership responsibility and growth in the subject leader's

role without recognition in terms of time (Hobbs, 2006). Many subject leaders consider their curriculum strength to be one reason that they were appointed to the position (Dinham, 2007), however it also appears that their own teaching suffers through the demands of the role (Collier et al., 2002; Glover & Miller, 1999). This pressure on their own teaching and the demands that draw away from spending time with staff on subject issues are identified as a concern by subject leaders (Collier et al., 2002; Hobbs, 2006). It has been noted however that some subject leaders are reluctant to interfere with the professional practice of colleagues, even if they perceive their performance to be poor (Bennett et al., 2003), and even when they do attempt to intervene the outcome is not always successful (Aubrey-Hopkins & James, 2002). This has been highlighted as an area of concern by experienced subject leaders and so could be an issue also for first time subject leaders which will be explored in this research.

## **Role tensions**

The subject leader's role is large, complex and changing, with little time allowance for the role. This leads to tensions within the role for subject leaders between being a subject leader and a classroom teacher and a colleague.

Subject leaders are primarily drawn from the ranks of teachers. They retain a significant teaching load and see their recognition as effective teachers as a major factor in their appointment (Glover, Miller, Gambling, Gough, & Johnson, 1999). Subject leaders gain authority and credibility with their colleagues by being seen as good classroom practitioners and role models (James & Aubrey-Hopkins, 2003). When taking on the role subject leaders are keen to use the role to influence others to achieve better classroom practice and better outcomes for students. The role is seen by many as primarily being a teacher leading teachers (Fletcher-Campbell, 2003). A significant tension

for subject leaders is the degree to which the subject leadership role impacts on their teaching performance. However some subject leaders do not think extra non teaching time is the answer because “the current teaching load ... kept them rooted in the classroom” (Hobbs, 2006, p. 19). This is in contrast with the Collier et al. (2002) finding that many subject leaders felt there was a need to reduce their teaching load to cope with the demands of the role. The second source of tension is the time that is taken from preparation and marking for the subject leaders own classrooms in order to meet the role requirements (Collier et al., 2002). There is clearly a tension between being a teacher and a subject leader.

Another aspect of the tensions felt by subject leaders is between being a professional colleague and having a monitoring and accountability role (O'Neill, 2000). Subject leaders express the desire to work positively with colleagues to improve performance. At the same time education reforms have introduced accountability systems to schools, performance appraisal and the consequent reporting is often delegated to subject leaders (Fitzgerald & Gunter, 2006). The tension is felt as the subject leader tries to act as mentor or coach at the same time as being seen to be reporting on teacher performance.

While some subject leaders have managed to adapt to the dual role many express difficulty, particularly when it comes to underperforming staff (Collier et al., 2002). While the roles of development and accountability seem to be in tension they are not irreconcilable (Brown & Rutherford, 1999). The confidence that is gained through professional collegiality can be used to help work through the issues raised by accountability. It has been cautioned however that the accountability systems linked with collegiality might be used as a way of controlling staff (Bennett et al., 2003; Fitzgerald & Gunter, 2006).

For subject leaders, particularly first time subject leaders, who come to the role with no leadership development there is a real tension between acting collegially and being the subject leader.

Some research that has examined the actual work subject leaders do has found that there is real tension between the managerial and professional leadership aspects of the role (Collier et al., 2002; Fitzgerald, 2004; Glover & Miller, 1999; O'Neill & Flecknoe, 2002). The need to achieve the immediate day to day tasks that maintain the subject area takes up much of the subject leader's time (Glover & Miller, 1999). Ensuring that teachers are in a room with a scheme and resources and class, that appropriate records are kept and maintained, dealing with the interruptions due to student behaviour, parent concerns and so on all take time (Glover & Miller, 1999). While these tasks are important and need to be done there is then little time left for the professional leadership aspects of being a subject leader (Collier et al., 2002; Hobbs, 2006; Kerry, 2005) as will be examined in the context of this research. Research indicates that these professional leadership aspects are important for achieving improvement in outcomes for students (Dinham, 2007; Harris, 2008) and that subject leaders value opportunities that they do get to exercise this leadership. They see the opportunities for strategic planning, mentoring teachers and professional dialogue around issues of curriculum, assessment and pedagogy as both a vital part of their job and an aspect that they most enjoy (Collier et al., 2002; Glover & Miller, 1999; Hobbs, 2006). Many subject leaders also value the opportunity to contribute to whole school planning and working with the whole school values and vision in their own subject area (Bennett et al., 2003). This tension between the valuable and important work of leadership and the time spent dealing with the immediate demands of day to day work in the subject area is recognised as a concern for subject leaders (Kerry, 2005; O'Neill & Flecknoe, 2002). This tension seems not only to be function of the subject leader role but also of the organisational structure and culture of the school.

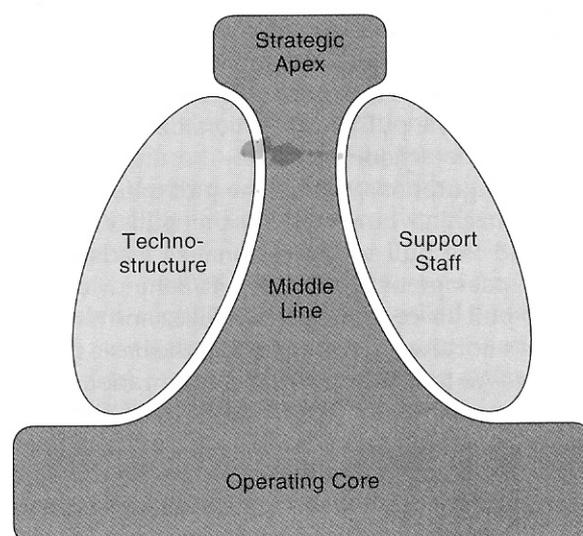
There is evidence that subject leaders are delegating tasks and responsibilities to other members of the subject area (Wise & Bush, 1999). However some are reticent to over delegate to teachers who already have enough to do and who should be focussed on teaching and learning. This ability to spread the load is also contextual as in larger subject areas there are more staff to spread the work around (Glover & Miller, 1999). While delegation appears to have a positive impact on department effectiveness it is unclear what the limits are before a burden is created on other staff (Dinham, 2007). Delegation, as distribution of tasks, can be reframed as distributed leadership as noted by Robinson (2008) or can be linked to the idea of succession planning and staff development (Mayrowetz, 2008). Delegation can have benefits for the subject leader and the staff, but can also contribute to tensions between the subject leader and colleagues.

O'Neill and Flecknoe (2002) suggest that given the size and complexity of the role schools should foster a culture of failure stating "that failure is an inherent feature of the subject leader's ... post. So much is required, in addition to teaching, that priorities have to be decided" (O'Neill & Flecknoe, 2002, p.28). The suggestion is that planning what tasks to leave out is a positive indicator for the subject leader's performance. By contrast in a study in Australia, across a range of school contexts, it has been found that "considering the known pressures and contradictions of the role of the secondary HoD, the HoDs leading successful departments ... have been able to deal with these and even use them to their advantage" (Dinham, 2007, p.77). There were eight characteristics identified with successful HoDs: Personal qualities, professional capacity as teachers, active in promoting their department, planning, collaboration and team building, value professional learning, build a culture of success and focus on students and their learning. The research here suggests that successful HoDs are able to utilise and motivate staff so that time is used wisely and not wasted. This report however does not indicate how much time was typically spent on the subject leadership role or

the impact on the subject leaders themselves. This research also focussed on a small number of subject leaders deemed to be effective and so does not indicate how the majority of subject leaders cope with the tensions and demands of the role. In an investigation at one school in England, Hobbs (2006) found that heads of faculty identified themselves more as managers than leaders suggesting that the leadership aspects of the role were being overlooked in the everyday business of the school day, this despite their expressed desire to take on more of a leadership role, this is similar to research with HoDs in Australian schools (Collier et al., 2002). While there is little evidence of this direct nature for New Zealand schools there are suggestions that similar issues are likely (Feist, 2007; O'Neill, 2000).

Not only are there tensions within the role of subject leader but the subject leader works within a larger school organisation which adds further to the complexity and tensions for subject leaders (Busher & Harris, 1999; O'Neill & Flecknoe, 2002). The effectiveness of subject leaders is linked to the support that they receive within the school structure. Subject leaders are more supported in some structures than others, and schools are able to restructure in ways that improve support and effectiveness of subject leaders in achieving learning outcomes for students (Brown, Boyle et al., 2000; Glover et al., 1999; Harris, 2008).

Within the hierarchical school structure subject leaders are in the middle and so have to mediate between the demands from leadership above and members of the subject area below (Gabel, 2002; Glover & Miller, 1999). Evidence from literature suggests that the school organisational structure has



an impact on the effectiveness of the subject leader (Brown, Boyle et al., 2000; Harris, 2008). Further the subject leader has responsibility for structuring their own area of the school (Busher & Harris, 1999). How the subject area is structured may be affected by several factors, but is an important part of situating the subject leader within the wider school organisation.

Schools are complex organisations but a conceptual framework developed by Mintzberg can be used to understand school structure (Hoy & Miskel, 2005). In Mintzberg's model there are five key parts of an organisation, strategic apex (Board of trustees/ senior leadership), Middle line (subject leaders/ other middle leaders), Operating Core (Teachers and students), Techno-structure (administrative support) and support staff as shown in Figure 2.1. These parts are controlled through coordinating mechanisms. Hoy and Miskel (2005) suggest that subject leaders also work within the techno-structure, this is consistent with the dual management and leadership role

**Figure 2.1: Mintzbergs' model of organisation structure.**

Source: Mintzberg (1979) cited in Hoy and Miskel (2005, p. 107)

identified for subject leaders (Glover et al., 1999).

Glover et al. (1999) looked at the role of subject leaders in the whole school context. The research identified that in general schools which maintained a traditional structure had subject leaders engaged mostly in administrative and management type activities whereas those that had restructured tended to have subject leaders who were more engaged in leadership activities and contributing to whole school development. This effect was enhanced in schools which specifically examined the subject leaders role and took this into account during restructuring (Glover et al., 1999). Brown et al. (2000) identified three school types and found that schools needed to engage in shared management, with subject leaders having an important

part to play in whole school decision making and collaboration concluding "Schools can no longer rely on hierarchical and autocratic forms of management." (Brown, Boyle et al., 2000, p. 45). The degree to which shared management happens depends on the school structure. More recently this idea of shared management has evolved into the concept of distributed leadership, with subject leaders seen as having a shared role in the leadership of the school (Harris, 2008; Robinson, 2008). It is also becoming apparent that school structure, as well as having an impact on shared management, also has an influence on the effectiveness of distributed leadership (Harris, 2008).

### **Professional and leadership development**

There are a number of studies that have looked at identifying the professional development requirements of subject leaders (Adey, 2000; Bennett et al., 2003; Kirkham, 2005), other studies have looked at ways of delivering professional development of subject leaders (Fitzgerald, 2000; Harding, 1990; Harris et al., 2003; Simkins, Coldwell, Caillau, Finlayson, & Morgan, 2006). The nature of the subject leaders role as having both leadership and management dimensions means that there is a need to consider leadership and management development issues (Cardno, 2005). There is also literature that points to elements that make for effective professional development (Piggot-Irvine, 2006; Timperley et al., 2007), including mentoring and coaching (Robertson, 2005).

Research has highlighted for some time the lack of professional development provided both pre- and post- appointment for subject leaders (Adey, 2000; Harding, 1990). Recent initiatives in England have helped to address this to some extent (Kirkham, 2005; Naylor, Gkolia, & Brundrett, 2006), however there is still a gap in providing for subject leader development in New Zealand

(Organisation for Economic Cooperation and Development, 2007). The most pressing professional development needs for subject leaders identified in the research relate to leading improvements in teaching and learning (Adey, 2000; Bennett et al., 2003), long term planning and prioritising objectives (Adey, 2000; Brown, Boyle, & Boyle, 2002) and contributing to whole school planning and implementing school wide initiatives in their own area (Adey, 2000; Bennett et al., 2003; Brown et al., 2002). These professional development needs reflect the nature of the role as a leadership role and the lack of pre-appointment development for the role. This issue helps shape the context for this research. Fitzgerald (2000) identifies professional leadership as key area subject leader development in New Zealand. Knowing the professional development needs is one thing, delivering professional development to meet those needs is another. In both England and New Zealand standards have been developed for subject leaders, although those in New Zealand are more generic for those with any kind middle management responsibility (Fitzgerald, 2000). It has been suggested in both countries that these standards could form the basis for professional development for subject leaders (Adey, 2000; Fitzgerald, 2000).

Harris et al. (2003) have investigated a programme linking with a tertiary educational provider to link theory and practice which also leads to a qualification. On a wider scale in England, the National College for School Leadership programme, Leading from the Middle (LftM) has adopted a coaching model to help improve practice (Simkins et al., 2006). There is evidence of positive impacts from both approaches (Harris et al., 2003; Naylor et al., 2006; Simkins et al., 2006). However given the relative lack of prior professional development for subject leaders it might be expected that any professional development initiative would show positive effects. The small amount of comparative evidence means it is not possible to determine the relative effectiveness of these approaches (Bennett et al., 2003).

Mentoring and coaching are seen to be important aspects of both effective professional development and leadership development (Robertson, 2005). Mentoring and coaching are also widely referred to as useful approaches for supporting the development of new school leaders (Hobson, 2003; Simkins et al., 2006). Of importance is that these approaches situate the learning within the school culture and context (Lashway, 2003; Robertson, 2005). The role of mentoring and coaching approaches as a way of providing support and development for first time subject leaders will be examined in this research. While much of the literature on leadership and management development refers to mentoring the more recent literature refers to coaching approaches (Simkins et al., 2006). Mentoring is seen as a broader process than coaching, with mentoring covering issues not only specific to the tasks but also a support and socialisation dimension (Hobson, 2003). Coaching is a newer concept in the literature and lacks a clear definition (Simkins et al., 2006) although there is a general agreement that it is more specifically task focussed. While Hobson (2003) refers to mentoring and coaching in the title the discussion refers to mentors and mentees, reflecting the prevalence of these terms.

It seems that mentoring has been almost exclusively used as a method of supporting first time leaders however Lashway (2003) warns that "mentors may become too controlling" (p. 3). Robertson (2005) describes a coaching model which is mutually beneficial and so could help overcome this concern. Much research also points to the importance of getting a good match of mentor and mentee (Hobson, 2003; Robertson, 2005), the probability being that without a good match the mentoring relationship will break down and gains will be limited. Additionally the pool of potential mentors within a school is limited as the mentor needs to have both the skills and time for the task (Bloom, Danilovich, & Fogel, 2005; Simkins et al., 2006). A further concern with using a mentoring programme as the sole means of development for first time subject leaders is that the role of a subject leader is complex and mentoring might not be the best approach for learning all aspects of the job

(Bolam, 2002). Coaching and mentoring programmes often include a period of training in the skills required (Robertson, 2005). Any development programme for subject leaders needs to be multi-faceted to reflect the many dimensions of the subject leaders role (Jones & O'Sullivan, 1997; Robinson, Eddy, & Irving, 2006). Robinson et al. (2006) also point to the diversity of participants in a first time principals programme as being an important reason for including multiple approaches and flexibility, it is likely that there could be similar diversity in first time subject leaders and no easy one size fits all solution can be provided. Mentoring can however be used to help the transfer of learning from other components into practice.

Notwithstanding the above points, there is much to be said for using a mentoring or coaching approach as a significant part of an professional and leadership programme (Robertson, 2005; Simkins et al., 2006). Successful mentoring benefits mentees as they develop in the new role more quickly, feel more sure of their role, feel reduced stress and feel that they are supported and valued in the new role (Hobson, 2003). Not all mentoring and coaching programmes achieve this, Simkins et al. (2006) point out that in one coaching programme most coaches met with coachees "fewer than the minimum number of meetings expected" (p. 327) and time has been highlighted as an issue for both mentor and mentee (Hobson, 2003; Robertson, 2005). While mentoring seems well researched in regards to its' role in professional development "some mentors... have questioned the appropriateness of coaching as means of inducting and training new headteachers" (Hobson, 2003, p. 22), although this may be related to lack of training of mentors, or to an unclear definition of coaching. Mentoring or coaching should not be seen as the only way of doing professional and leadership development for first time subject leaders, but are however powerful methods for making links between content, practice and culture (Robertson, 2005; Rudman, 2002; Simkins et al., 2006) as will be examined in the context of the current research.

The general professional development literature identifies some key ideas that impact effectiveness as focussing on the big picture, integrating the aspects of a programme, making links to teaching and learning and sustainability (Timperley et al., 2007), Piggot-Irvine (2006) adds that effective programmes incorporate principles of adult learning.

A focus on the 'big picture' seems to be at odds with the standards based approaches which seem to split the development into discrete units (Duignan, 2004; Fitzgerald, 2004; Robertson, 2005) however there is a need to meet immediate needs for those who are first time in a role (Lashway, 2003; Rudman, 2002). At the same time evidence suggests that learning is effective when there is time for reflection (Bennett et al., 2003; Robertson, 2005) there is balance between meeting immediate needs and developing deeper strategies for problem solving (Lashway, 2003; Robinson et al., 2006). While dealing with immediate challenges there is also the possibility of extending this into deeper learning which links with practice (Piggot-Irvine, 2006; Robertson, 2005; Timperley et al., 2007). There is a tension here when recognising that a major issue for subject leaders is finding time (Brown et al., 2002). There is a need to make links between the components of professional development and the big picture explicit.

Incorporating a range of activities is not in itself necessary for effective learning although diverse opportunities are recognised as important (Kochan, Bredeson, & Riehl, 2002; Piggot-Irvine, 2006). The activities have to be linked to the content (Timperley et al., 2007) but also need to reflect the organisational culture (Piggot-Irvine, 2006). In linking activities to content there is a need to help ensure that learning is transferred into practice. This can be achieved by ensuring that the learning activities are embedded in and content arises from, or is linked to, practice (Piggot-Irvine, 2006; Robertson, 2005). There is also a need for a supportive environment (Kochan et al., 2002; Piggot-Irvine, 2006; Timperley et al., 2007) including participation in a learning community,

either within or outside the school (Bennett et al., 2003; Piggot-Irvine, 2006; Timperley et al., 2007) and use of a mentor or coach to support learning (Kochan et al., 2002; Robertson, 2005). There is also evidence that having some degree of external input assists professional development and learning (Bennett et al., 2003; Robertson, 2005; Timperley et al., 2007) especially where there is a research focus. However this may be going beyond the needs of first time subject leaders. It has been shown that opportunities to use learning soon after the learning occurs are important, and this needs to be integrated into a professional development programme so that the timing of programme components links to the needs (Belling, James, & Ladkin, 2004). A further aspect of effectiveness is having a built in evaluation of the programme (Piggot-Irvine, 2006). Other issues that are important include allowing time to learn (Robertson, 2005; Timperley et al., 2007) and setting goals that are challenging (Piggot-Irvine, 2006; Robertson, 2005). Professional development for first time subject leaders would seem to need to provide a range of activities, but these need to be closely linked to practice and provide time for the first time subject leader to reflect on their practice.

Clearly the roles of subject leaders are ones requiring management and leadership knowledge and skills (Hobbs, 2006; Organisation for Economic Cooperation and Development, 2007). Development for these roles will then need to reflect ideas of management and leadership development. Leadership and management development requires more than just surface training for the job (Gill, 2006) but consideration of some deeper issues (Harris et al., 2003; Woodall & Winstanley, 1998) this is especially true with a change to consideration of leadership as well as management (Gill, 2006). Given that subject leaders have this dual role these principles of leadership development will apply to subject leaders' development.

## **Facilitators of and barriers to development**

Key organisational barriers to leadership development are culture and time. These barriers can be dealt with in the design of the programme (Gill, 2006). In reporting the components of successful leadership development coaching, role models and professional qualifications are seen as important, these approaches are supported by Harris et al. (2003). The importance of some form of higher level academic study linked to practice is seen as important in developing not only job skills but a deeper understanding and reflective ability of leadership (Gill, 2006; Harris et al., 2003) and the ability to theorise and conceptualise problems in finding solutions (Robertson, 2005). Harris et al. (2003) describe a model of cooperation between local education authorities and tertiary institutes which provide Masters Qualifications but also link to practice. While leadership development is seen as an ongoing process (Margerison, 1991) development programmes for subject leaders need not reflect the entire range of leadership development but need to be situated within this continuum.

## **Conclusion**

This chapter has reviewed the literature relevant to the issues facing first time subject leaders. The complex and changing nature of the subject leader's role is seen as producing role tensions. The role is situated with the context of the school organisation and culture and these have an impact on the role tensions and the ability of subject leaders to adapt to the role. Professional development and support are seen as critical areas in developing the leadership and management capability of first time subject leaders. Each of these themes is picked up as part of this research. The literature relevant to each of these areas has been explored in some depth. The review of

literature contributes to methodology for this research which is discussed in the next chapter.

## CHAPTER THREE – METHODOLOGY

### **Introduction**

This chapter outlines the methodological background to the research. A consideration of educational research traditions leads to the situating of this research as an interpretive, qualitative study. The research methods most appropriate for the collection of data for this research are outlined. Steps that have been taken to ensure the reliability and validity of the research are described, including processes of triangulation and an established audit trail. The ethical considerations are outlined.

### *Qualitative research paradigms*

Educational research which has a history going back to the 1800s (de Landsheere, 1997). The purpose of educational research was to produce generalised theories of education (Cohen, Manion, & Morrison, 2007). This early research falls into a positivist research paradigm which sees truth as an objective reality to be discovered (Husen, 1997). During the 1900's there was increasing interest in the social factors affecting education driven by the philosophical approaches of researchers (de Landsheere, 1997). The advent of the computer age brought the ability to process large amounts of data. This has resulted in positivist research being identified with quantitative methods, although this need not be exclusively so (Cohen et al., 2007; de Landsheere, 1997).

Paradigms are not easily overturned. The first approach of the research community is to add to the complexity of the paradigm that has worked well, rather than move to a new and untested paradigm (Kuhn, 1970), however through the 1960s and 1970s the complexity and contextual nature of

educational settings was being recognised (de Landsheere, 1997). The acknowledgement that people have agency and make their own choices and that researchers are not outside objective observers meant that positivist paradigms assumptions about objective choice were challenged (Cohen et al., 2007; de Landsheere, 1997). The need to acknowledge the range of factors that influence research led to the growth of methodologies based on an interpretive paradigm that considers the context of the research (Cohen et al., 2007). A key feature of interpretive research is that it seeks to understand situations rather than to try and produce generalisations, for this reason research within this tradition is qualitative (de Landsheere, 1997). Interpretive methodologies have been criticised for not providing generalisations and so for not offering much of general value, while positive methodologies have been criticised for ignoring context and focussing too heavily on the measurable rather than seeking understanding of situations (Cohen et al., 2007).

Recent trends in educational research have sought to view interpretive and positivist research as complementary rather than dichotomous, each having something of value to add to create a complete picture within the research (Husen, 1997). A concern for educational researchers was the gap between research and practice, and the apparently low regard for, and uptake of, research findings by practitioners (Robinson, 1998). This has seen an increasing trend in educational research towards practitioner research in which current educational practitioners carry out research that enables them to understand and make changes within their own practice (Robinson & Lai, 2006). As stated in the introduction chapter the researcher is a practitioner and so this research falls into a practitioner research tradition.

## *Methodology*

With these considerations it is necessary to use a methodology that will bring together the aspects required to provide a balance between the breadth and depth of data. The methodology in this research is qualitative and inductive (Cohen et al., 2007). As a small scale qualitative study data has been collected from six subject leader participants giving the research data some depth (Yin, 1994). At the same time there will be the breadth of data from two schools. From this approach it will be possible to compare and contrast the data for individual schools from multiple participants and also begin make generalisations from the between school comparisons of data (Cohen et al., 2007; Yin, 1994). A qualitative methodology allows the researcher to draw on a wide range of methods to understand complex issues and phenomena (Cohen et al., 2007). Qualitative methods also allow for the examination of peoples interpretations of the issues. This means that a qualitative methodology will enable the issues facing first time subject leaders to be explored in some depth; this is consistent with aim of this research.

## *Research methods*

Qualitative research involves collecting data from multiple sources. This data can be used for triangulation to help ensure the validity of the findings. It can also be examined for contradictions that might explain the problematic experiences of first time subject leaders. The methods need to be appropriate for the purpose of the research. This research examines the issues facing first time subject leaders, and the support and development they receive. Three sources of data were used to provide the evidence needed for the research.

The first data source was interviews. Subject leaders were interviewed, using semi-structured interviews to gain an understanding of the issues that they have faced, and their opinions of the support and development they have receive.

The use of semi- structured interviews, using an interview guide approach, with the subject leaders enabled in depth data collection during the interviews (Cohen et al., 2007). These interviews allowed the role of the subject leader to be examined in the school context, and issues facing and development experiences of the subject leader to be understood. The semi-structured interview approach was appropriate as the interview could be kept focussed on the main research questions, but ideas that come out of primary questions can be explored in more depth (Cohen et al., 2007). Also as there is limited literature available on the issues facing first time subject leaders using a semi-structured interview method allowed flexibility for the interview to be shaped to each schools circumstance. The need for some structure however was important as this facilitated the analysis when making comparisons between the two schools and identifying common themes (Cohen et al., 2007). Care was taken to ensure that all the relevant topics were covered.

The interview schedule was in two parts, see appendix A. The first part covers relevant demographic questions, asking how long the subject leader had been in the role, the curriculum structure in the school, the department size and complexity in terms of number of staff and courses offered and the time and payment received for the position. Typically these demographic questions are closed questions, however the question asking about school structure is more open as there are a range of ways in which schools might be organised. This question was not well understood by the subject leaders and needed more prompting than anticipated. The answers to these

questions provide relevant context for analysing the questions specifically related to the issues facing first time subject leaders. This context has been described in chapter one.

The second part of the interview schedule asked questions relating to the issues the participant faced during their first year as subject leader. A statement from the interviewer reminded participants of this as some had been in the role for up to three years. The questions in this part of the interview were framed more as statements requesting a response as this was seen to create a more conversational tone for the interview and invite greater reflection. Also responding to statement did not create the suggestion of a right or expected answer and so should have led to more reliable data collection. Prompts were used to invite participants to expand on responses although care was taken not to direct the participants but rather to hear and understand what they were saying (Silverman, 2001).

Once the accuracy of the transcripts was verified, by participant checking of the transcripts, each transcript was read through several times to get a feel for the general thread of the discussion and the main overall ideas that seem to emerge. The transcripts were then be coded to identify the themes and issues. Care was taken with coding so that it allowed for the categorisation of information when drawing out the themes (Cohen et al., 2007; de Vaus, 2002; Merriam, 1998). For this reason the researcher read through the data once to identify the broad categories of data relating to the research questions (Krueger & Casey, 2000). Once these major groups had been established then the data was coded in sub categories to identify the main themes behind each of the major groups of data (Cohen et al., 2007). This careful coding and sorting of data enabled information relating to each of the research questions to be extracted and analysed from the interview transcripts (Krueger & Casey, 2000). The codes and sub codes used are shown in Table 3.1 and have been used to structure the data analysis.

As the interview data provided both the greatest quantity and depth of data, and also since this data related most closely to the experiences of subject leaders, the codes developed from this data were used to code the questionnaires and documents.

**Table 3.1: Data analysis codes**

Codes	Sub Codes
Role	Leadership / Management Tasks Clarity Size Learning
Tensions	Colleagues Teaching Leadership v management (L v M) Family
Coping	Delegation Seeking Support (SS) Time Management (TM) Task Management
Support	Senior Leadership Structure HOD Internal External Other Support
Development	Formal / Planned Mentoring Internal Development (ID) External Development (ED) Outcomes
Facilitators /Barriers	School / Organisation Personal

The second data source was documentary analysis. Subject leader job descriptions and school professional development policies were collected for documentary analysis to help develop an understanding of the subject

leader's role, and look for structure in the provision of professional development.

Each school was asked to supply copies of their subject leader job descriptions and professional development policies. Both schools provided job descriptions and one school supplied a professional development policy, the other school did not have a professional development policy. Both job descriptions were very closely aligned to the professional standard for unit holders, which meant that there was not much differentiation in these. The small amount of data available from documents relating to the first time subject leaders role and development is a problem for analysis, but significant in its own right.

Documentary analysis has been used to analyse the job descriptions and professional development policy (Cohen et al., 2007). The codes used in analysing the interview data were also used to interpret the documents and provide some understanding of how the schools see the role and development needs of first time subject leaders (Fitzgerald, 2007). The small sample of documents available meant that there was limited documentary evidence to draw on, especially as the two job descriptions were almost identical, however the research was able to use documentary analysis for triangulation of other data analysis. Documents often represent the views of a small group of individuals and are written for a specific audience, the data therefore needs validation (Cohen et al., 2007). Comparing evidence from the documents with the data collected from interviews with the subject leaders and the questionnaire data meant that some useful interpretations could be made. This has contributed to the analysis of data as a whole and provided some evidence to help understand the issues facing first time subject leaders.

The third data source was questionnaires completed by senior leaders to find out what they perceived to be the issues for first time subject leaders in their school, and how the school helped to support and develop their first time subject leaders.

Senior leaders at each school were asked to complete a brief qualitative questionnaire about the experiences of first time subject leaders at their school, see appendix B. The questions were asked to reflect those on the interview schedule so that comparison could be made between what the school thought were the issues facing their first time subject leaders and the experiences of the subject leaders. The questionnaire also sought to find out what support and development opportunities schools were providing for subject leaders and what they thought were some of the factors influencing the effectiveness of these strategies. This allowed further comparison with the subject leader's answers from the interviews. As only two schools participated in the research there were only two questionnaires to analyse. These supplemented the information provided by the documents.

Once coded and sorted the data was ready for analysis. Not all the issues identified had evidence from the questionnaires or documents due to the small amount evidence available from these sources. The interview data from the subject leaders was first compared to identify the common issues. By analysing the data across all subject leaders the common themes were identified rather than issues specific to an individual, although it has been noted when an individual's response to an issue was significantly different to the others. This has allowed the common concerns to be identified so that the conclusions drawn are likely to inform practice in other schools (Cohen et al., 2007; Cresswell, 2007; Yin, 1994). Once the interview data was analysed then the documentary evidence and questionnaires were compared to look for supporting, or contradictory evidence that might help explain or inform the issues raised by the subject leaders.

### *Participant selection*

In considering the selection of participants there were a number of issues considered. The research needed to obtain information from more than one school in order to ensure sufficient depth to the data obtained, and some means of participant validation or triangulation. This means that the number of schools selected needs to be small (Cohen et al., 2007; Cresswell, 2007). Time constraints on the research also place limits on the number of schools and subject leaders from which data can be collected.

In order to obtain the data for this research twelve schools were approached, using convenience sampling of schools close to the researchers' home, to participate in the research (Cohen et al., 2007). Some schools indicated that they did not have any recently appointed subject leaders; some indicated that other commitments prevented participation and some did not respond. Three large, multicultural urban schools indicated a willingness to participate and signed consent forms permitting access to the school. Two of these schools were selected to participate in the research. One school was structured around faculties and the other with a smaller department structure.

The literature does not indicate that issues faced by subject leaders depend on the location, size or cultural mix of the school for this reason the sample of schools is considered appropriate. The size of subject area does seem to have an impact on the subject leader's role and so is likely to impact the issues facing first time subject leaders, the selected participants cover both large faculties and small departments in order to reflect this. School structure has also been shown to have an effect on the issues facing subject leaders. The two schools selected have different curriculum structures and so will enable these issues to be examined.

Three recently appointed subject leaders from each school participated in the research. Subject leaders were selected on the basis of having been in the job for less than three years, such subject leaders are new enough to the position to be able to recall issues from their first year as subject leaders. Also these subject leaders have been appointed since the introduction of NCEA in 2002, the last major national change in curriculum and assessment in secondary schools. They have taught and been promoted within the current decentralised educational setting. This means the issues faced by these subject leaders are not dominated by a major educational initiative, but are the general issues faced by first time subject leaders.

### *Validity and triangulation*

Ensuring that the research findings report accurately the situation being researched is an important concern of qualitative researchers (Cohen et al., 2007). There are no ready statistical measures of validity so the validity has to be tested by ensuring the authenticity of both the data collection and data analysis (Merriam, 1998). Triangulation is an important method of ensuring validity in qualitative research (Yin, 1994). In this research triangulation was achieved in a number of ways.

Methodological triangulation: I used multiple sources of data to collect evidence. In this research I used interviews with subject leaders, questionnaires from senior leaders and documentary sources from schools. This triangulation is shown in Table 3.2. Note the theme coping does not have any evidence for triangulation, but was considered to be strong enough as a theme from the interviews to be worth including.

**Table 3.2: Methodological triangulation of data**

<i>Data source</i> <i>Issue/Theme</i>	<b>Interviews</b>	<b>Documentary Analysis</b>	<b>Questionnaires</b>
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<b>Role of Subject leader</b>	✓	✓	✓
<b>Tensions</b>	✓	✓	✓
<b>Coping</b>	✓	x	x
<b>Support</b>	✓	x	✓
<b>Development</b>	✓	✓	✓
<b>Facilitators/Barriers</b>	✓	x	✓

Peer triangulation: I had another person with appropriate knowledge was asked to check the interpretation of the data and comment on the codes and themes that I had identified.

Participant triangulation: I included participants from two different sites in the research to overcome the chance that organisational culture might affect my data.

Data source triangulation: the use of multiple participants allowed issues common across multiple interviews, documents or questionnaires to be highlighted.

### *Reliability*

Reliability in scientific research refers to the ability for a study to be replicated. As this is a small scale qualitative study it reports on a situation which by its nature cannot be replicated (Stake, 1995). In this research the question of reliability is whether another research following the same methods would come up with similar conclusions (Cohen et al., 2007). Reliability in qualitative research means that the conclusions from the research can be regarded as having some more general application (Merriam, 1998).

Reliability has been assured in this research by establishing a clear audit trail and stating the researcher's position (Merriam, 1998). This means that the processes and protocols of research have been clearly reported, including

the methods of selecting participants, protocols for data collection and the data analysis techniques used.

## **Ethical issues**

Any research is bound by ethical concerns; the basic concern has been that the research should cause no harm to participants (Cohen et al., 2007; Wilkinson, 2001). Even more the research should, where possible, provide some benefit to those taking part. Sometimes research can have unforeseen consequences, and in general every step has been taken to avoid these, and ensure that any potential harm has been avoided (Cohen et al., 2007; Wellington, 2000).

Both the school and subject leader consent forms contained statements concerning the protection of confidentiality and privacy of data. Confidentiality has been maintained by ensuring that there are no identifiers on any forms or transcripts that can link the data with an individual, except the informed consent agreement which have been kept locked away. Where schools are used their identity within any report has been disguised by assigning a School A or School B label. Individual subject leaders (SL) have not been identified within any reports, where quotes are used the codes SL1-SL6 have been used (Cohen et al., 2007). Privacy has been guaranteed by ensuring that all data is kept in a secure place and that access is limited to those who have been disclosed as having access (Cohen et al., 2007). Overall the research design is such that it minimises harm to participants while still achieving the research aims.

## **Conclusion**

This chapter has introduced the methodology of this research as a small scale qualitative study. The use of interviews, documentary analysis and questionnaire as data collection methods have been discussed, together with the process for data analysis. Methods of triangulation to ensure the validity of the data have been given. The next chapter introduced the findings of this research, including issues to related to the role and the first time subject leaders understanding and development for the role and the support that they were able to access.

## CHAPTER FOUR – DATA FINDINGS

### **Introduction**

The data collected from the interviews, documents and questionnaires are presented in this chapter. A thematic presentation of the data is used to show the issues that were identified by subject leaders to be of importance. Demographic interview data is presented first to provide information about the participant schools and subject leaders. The data relevant to each of the main themes are then presented. The inter-relatedness of the issues identified from the findings is presented in a theoretical model.

### **Demographic data**

The data from the first section of the interviews were combined to provide background information on the participant schools and subject leaders.

School A is organised on a faculty structure with a faculty leader appointed to oversee the work within a group of departments. Each faculty leader is associated with a member of senior leadership team to whom they report. The faculty leaders and department heads are both considered to be subject leaders.

School B is organised on a department structure with each subject having its own subject leader. In smaller subject areas one leader may be responsible for more than one subject area. One of the senior managers has designated responsibility for curriculum and all subject leaders report to this one senior manager on curriculum matters.

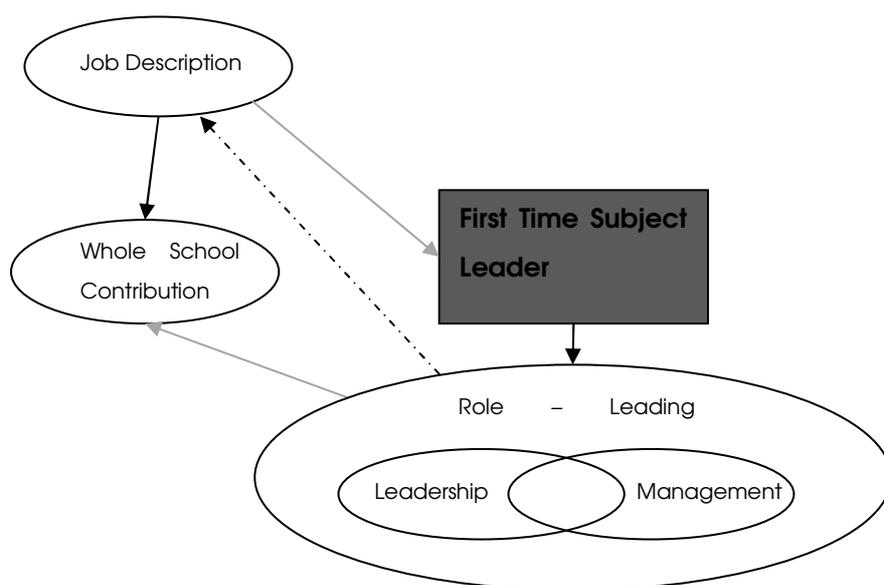
Three subject leaders from each school were interviewed, a total of six subject leaders. The curriculum areas for which they are responsible are all different, and varied from small departments to large faculties. For the purposes of the research the subject leaders were asked about the size and structure of their subject area, and how much payment they received, and time allowance was given for the job of subject leader. The payment is listed as a number of Management Units, each unit currently equating to a payment of \$3800 per annum. All the participants are in their first position as subject leader, although some had been assistants in a learning area previously. Four of the subject leader's were appointed internally and two, SL2 and SL4, were external appointments. This information is summarised in Table 4.1.

**Table 4.1: Summary of Subject Leader participants**

	Length of time as a subject leader (years)	Number of staff in the subject area- excluding subject leader	Number of other staff with subject responsibilities	Number of subjects/ courses responsible for	Number of management units	Time allowance (hours/week)	Internal/ external appointment
SL1	1.5	20 (including part time)	3	16	4	4	Internal
SL2	3	8.5	1	8	3	3	External
SL3	0.5	1 teacher, 7 itinerants	0	8 (but 5 of these are in combined classes)	2	2	Internal
SL4	0.3	1.5	0	9	2	2	External
SL5	2	4 full time 3 part time	1	8	2	4	Internal
SL6	0.75	15 (including part time)	3	10	4	3	Internal

## Role of subject leaders

One of the main issues that emerged from the findings is that of role clarity. The main components related to the role clarity were the lack of a clear job description, unclear expectations on how the role related to whole school planning and the poor communication of role expectations. The relationships between these issues are summarised in Figure 4.1. The lack of clarity is represented by the gray and broken arrows in the diagram.



**Figure 4.1: Factors contributing to the lack of role clarity**

Subject leader's responses to questions about their understanding of the role raise issues of the clarity of understanding of the role, both in what is expected of a subject leader and how much is expected of them. This issue is confirmed by the analysis of the questionnaires and documentary analysis. The questionnaire asked about the subject leaders understanding of the role when they were first appointed and after one year in the role, or current understanding if less than one year in the role. These findings are reported below.

### *Initial understanding*

All the subject leaders interviewed had some understanding of the role prior to taking up the position. They indicated they knew the role had both aspects of leadership and management, although the balance between the two aspects expressed was quite varied. The range from one leader who emphasised management aspects of the role

*SL4 "a subject leader is just making sure all the paperwork is tidy, any managerial...issues get dealt with quite quickly."*

To one who had more of a leadership emphasis

*SL6 "my understanding of it would be to lead a team of teachers... into the era of the new curriculum."*

All the subject leaders stated their understanding of the role in terms of achieving learning outcomes for students within their subject area. None of the subject leaders suggested contributing to school-wide leadership and management was part of their role, shown by the dotted arrow in Figure 4.1, although job descriptions clearly indicated that this was part of the role this, "make constructive contributions... to the management of the school". One subject leader indicated that they saw the role as having an aspect of promoting or advocating for the subject within the school, another subject leader indicated that they regarded co-curricular activity as an important aspect of the role, although this may be more indicative of the subject area, music, rather than the role. Two subject leaders explicitly said that their initial understanding of the role was vague.

*SL1 "Rather hazy...at the end of my first year I had some training... but up until then it was a little bit hazy."*

Five of the subject leaders said they started by carrying on the subject area in the same manner that the previous subject leader had, although one

indicated they made significant changes to the direction of the subject area from the start.

*SL4 "before I came up I was a bit worried... about all the programmes that they were running and changed them all"*

### *Changing understanding*

All the subject leaders indicated that their understanding of the role changed during their first year in the role. They all found that the role was bigger than they had anticipated. Most stated that there were aspects of the subject leader role that they were not aware of when they took up the position.

*SL3 "it's kind of getting into all those little subsections in there, like responsibility for NZQA stuff that...I hadn't thought about much before."*

One subject leader thought that their initial view of the role was about right in terms of balance between leadership and management, but that the role size was larger than anticipated. This was partly attributed to becoming aware of the wider context.

*SL1 "I became much clearer of the over picture, the big picture... I needed to."*

The most common issues that subject leaders had not anticipated were interactions with senior management for administrative requirements, compliance with external agencies for assessment and staff management issues. The unexpectedly large size of the role caused stress for some first time subject leaders.

*SL4 "I got quite grumpy when I first came in because people kept dumping bits of paper on my desk..."*

*SL3 "I certainly felt like I was drowning... because there seemed to be so much coming at me and I didn't know what to do. "*

The job descriptions also highlight the wide range of issues for which subject leaders are responsible. Some of these areas include resource management including budgeting, staff and student management including performance management and monitoring teacher - student relationships, professional leadership, including accounting for the changing social and cultural factors affecting the school and fostering relationships with the community. Both schools indicated role size as an issue stating that "time management" and the "sheer number of things that they were expected to do in a day!" were issues experienced by first time subject leaders.

Subject leaders who had previously had a role as an assistant subject leader in general had a better idea of what the job entailed because they had worked more closely with a subject leader before. They also expressed some surprise at the size of the role this will be discussed further in chapter five.

*SL6 "the role is so, I believe quite big and diverse... one of the challenges is wondering if I'm doing the right job."*

Subject leaders who were totally new to the role suggested that they had a good understanding of what they thought the role would be. They also expressed the biggest difference between what they expected and what they experienced. The lack of role clarity and stress that results for first time subject leader's impacted on their effectiveness and contributed to some of the tensions noted later in this chapter. Subject leaders changing understanding of the role will be discussed in the next chapter.

### *Factors influencing role clarity*

Role clarity was a problem because of the unclear links between the job description, expected tasks in the role and role size. Some of these issues are contextual, for example the leaders of the smaller departments were more likely to emphasise issues related to the management aspects of the role and the leaders of larger subject areas were more likely to place emphasis on issues related to the leadership aspects of the role. In smaller departments the leader had more day to day contact with individual teachers within the department and was able to exercise the leadership functions in a less formal way.

*SL2 "it's a fairly small department...we tend to stay down there all day... you get to know each other well."*

However in smaller subject areas there were fewer people to spread the management load around as discussed in the section of this chapter on coping strategies.

One reason for the changing understanding of the role was a lack of clarity in the job description for three subject leaders, this is represented by the gray arrow in Figure 4.1.

*SL2 "there's no handbook as such... a little bit of a job description, but, you know, a little loose."*

School A subject leader's job description was the generic *professional standards* for unit holders and included aspects specific to Guidance Counsellors. School B's job description was based on the standards but had adapted the language so that "area of responsibility" was changed to "department", however the task descriptions were still very general, for example "Represent the department in various forums as required" and "Be up to date with education developments and changes, particularly as they affect the department." The job descriptions thus had a general sweep of

the role responsibilities. They did not provide clarity about the role in a way that would enable a first time subject leader to understand the role, as illustrated by the gray arrow linking the job description to the first time subject leader in the model. This important finding is discussed in chapter five.

Role size is clearly related to role clarity as the lack of clear boundaries led to the view that more tasks are being imposed on subject leaders. One questionnaire indicated that “unrealistic/ unclear expectations” was an issue for first time subject leaders. The time needed to do the job was a recurring issue for all the subject leaders interviewed. First time subject leaders found the role larger than anticipated and many spoke of being among the first staff to arrive in the morning and the last to leave in the evening. Needing to take work home was common, while one subject had tried to avoid too much impact on family life by working through morning tea and lunch breaks. Five of the subject leaders suggested that the time allowance for the job was too little for all that is expected, although one also suggested that if more time were given it might produce short term relief but ultimately just more work.

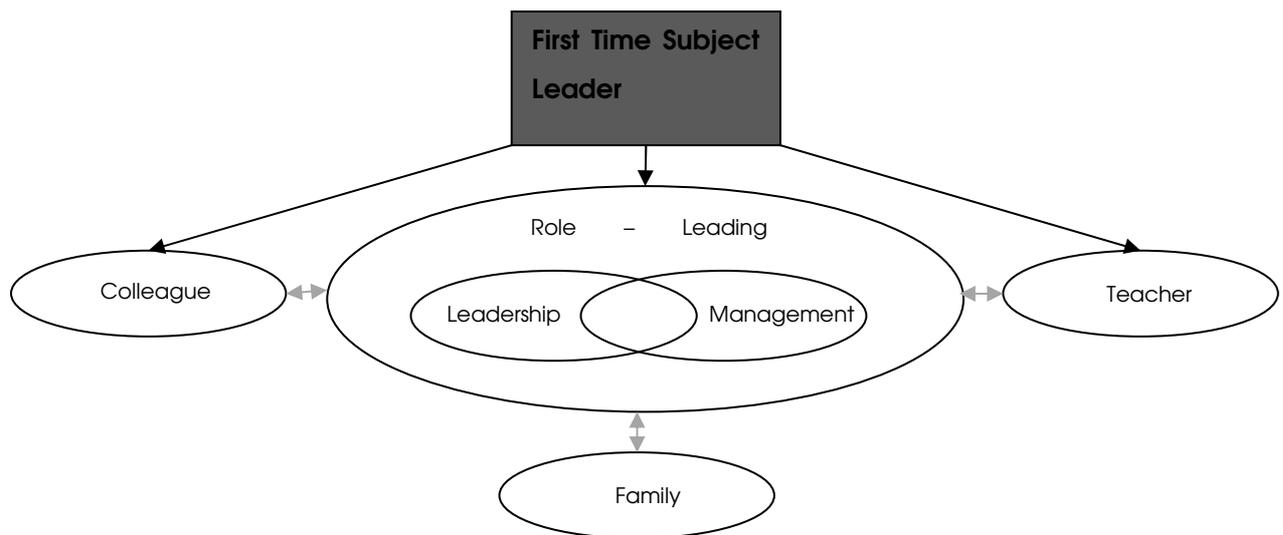
*SL6 “as I say time is something if you give us more we’re just going to find, or senior leaders are just going to find more for us to do in that time.”*

Another time related issue for first time subject leaders was the inability to plan and manage time due to interruptions and other urgent demands. Common interruptions were student discipline issues and senior leaders wanting information. These issues of role size and time issues confirm what was found from the questionnaires, “sheer number of things they were expected to do in a day”, and impacted the first time subject leader’s ability to understand and do the job.

The analysis above shows that one of the overriding issues for the first time subject leaders in this study is lack of clarity about the role. The generic nature of the job descriptions suggests that the schools in this research have not thought about unpacking the detail of the role. The associated uncoordinated demands, particular from the senior leadership of the school further contribute to this lack of clarity, as does the role size which seems to have unclear boundaries. This has implications for time management and understanding the size of the role. Figure 4.1 has illustrated the aspects of this issue which will be discussed further in chapter five.

### **Role tensions**

Tensions between the role of subject leader and other aspects of the subjects leaders work within the school were raised as an issue of concern. The main tension expressed by all subject leaders in the interviews was that between the role of subject leader and being a colleague. This tension was most evident from the leaders of larger subject areas and was backed up by evidence from the questionnaires. Some of the factors that contributed to this tension were age, internal appointment and having an unsuccessful applicant in the department. Another tension expressed was between the role of subject leader and still being a classroom teacher. Subject leaders who have families indicated that was also a source of tension for them. None of the subject leaders identified a tension between leadership and management as the literature in chapter two might have suggested. These tensions are illustrated in Figure 4.2. Leadership and management are inside the role as they were not seen to be in tension, the gray arrows to colleague, teacher and family indicate the tension found with these issues.



**Figure 4.2: Role tensions experienced by first time subject leaders**

Subject leaders expressed tensions between the role of subject leader and those of colleague and teacher, as shown by the gray arrows in Figure 4.2. They did not see a tension between management and leadership, but saw these as complementary aspects within role, thus they are included inside the role in Figure 4.2. Subject leaders were also conscious of the impact the role has on their families.

### *Colleague v subject leader*

First time subject leaders stated they found a tension adapting to the role of subject leader while being a colleague to the staff they were leading. The analysis of the questionnaires was supported by subject leaders in respect to this tension between being a colleague and a leader. This tension had an impact on how first time subject leaders related to their colleagues and staff. Subject leaders identified a number of factors contributing to this tension. Senior leaders were aware of a tension between first time subject leaders in their role and colleagues. This tension was expressed in a number of ways by senior leaders. One was as an issue of credibility related to the age and experience of the leader, "credibility issues (especially if younger than some

staff)". "Changing relationships especially if worked previously in the school" was another cause of tension between subject leaders and colleagues identified from the questionnaires.

A younger subject leader indicating that his age may have contributed to this tension, while an older subject leader indicated age was a factor in limiting this tension.

*SL5 "apart from one of the staff I'm 10 or 15 years older than them so... I think that's helped."*

The issues of age and experience were linked, however these subject leaders clearly indicated age was the factor they considered important.

Some internally appointed subject leaders indicated the changing relationship with other department members was a tension for them as they sought to establish themselves in the role. This was especially true where friendships had developed, but the subject leader now recognised the need to keep friendship and professional issues separate.

*SL1 "I had friendships that I had built up over many years that I had to... deal with."*

However this tension was not only experienced by internal appointees, those appointed externally also suggested that the way they relate to colleagues has changed, and they had to be more conscious of these relationships.

*SL2 "'I find it quite sometimes difficult in the department, people might be slagging a teacher off and it's like I can't join in...If I wasn't in my role you know I'd probably be joining in."*

This tension was confirmed by the evidence from the questionnaires. "Tensions from staff who resent them getting the job" was identified in one questionnaire. This was reflected in responses from two subject leaders,

especially where there have been other internal applicants. This was backed up by subject leaders who found themselves in this position.

*SL2 "there was... an internal applicant for the job so the relationship was a bit frosty to start off with."*

A reluctance to impose on staff was another aspect of this tension for first time subject leaders, this was not evident from the questionnaires.

*SL4 "I feel like a terrible nagger... I know other people are busy and you sometimes feel quite dreadful for asking people to do things."*

This awareness of the busyness of others was also apparent for subject leaders in larger departments where there were other management unit holders.

*SL6 "but then my assistants are only paid one management unit each and only given one extra hour so I have to be mindful of the jobs that they do and the jobs I impose on them."*

This illustrates an aspect of the tension between seeing the role as improving staff as teachers and protecting them from impositions.

This tension between leading improvement and protecting was also apparent when subject leaders talked about being role models for their colleagues. Subject leaders suggested they were role models both in their teaching and in their work attitudes. This role modelling was seen as possibly having both positive and negative impacts on staff. One subject leader spoke of working hard and "they see how hard you're working and step up" (SL3), while another subject leader was concerned that "if you're killing yourself in the job they'll start trying to match up." (SL1)

The tension between being a leader and a colleague is significant because it affects the relationships within the department, and thus impacts on how teachers work, and how students learn. This tension is discussed further in the

next chapter. Subject leaders are focussed on their role as leaders of learning, as indicated in the section on role clarity and tensions that impact that are of concern to subject leaders.

### *Teacher v subject leader*

Subject leaders also maintain a substantial teaching load and this was another source of tension for first time subject leaders. While neither the job descriptions nor the questionnaires anticipated a tension, four of the subject leaders indicated that there is a tension between the subject leader role and that of being a classroom teacher. This tension was well expressed by one subject leader who said:

*SL1 "I think that's the hardest thing to go from thinking about what your students need to what all the students in the department need."*

This again emphasises the subject leader's focus on outcomes for students. The main impact was in terms of time for preparation and marking. None of the subject leaders indicated that interruptions to classes were an issue for them. One subject leader expressed the view that being a subject leader improved their classroom teaching while another described protecting their classroom teaching from the intrusion of the subject leader's role.

*SL5 "I spend extra time just trying to better myself... I'm a lot more prepared than I have been in the past."*

*SL6 "When I leave my office and go to teach a class I'm going there as a teacher."*

The other four subject leaders all indicated that the role had an impact on their preparation and marking which negatively impacted their own students, although one added that while the students lost out in some ways they

gained in others as a result of the subject leader having the big picture of how the learning fits together.

*SL1 "they gain because I can see the bigger picture that the ordinary teacher doesn't see... but they suffer in terms of marking... preparation."*

The fact that the job descriptions for the role of subject leader did not include the teaching responsibilities means that they are not a complete job description for the person. This suggests that schools regard the role of subject leader and the teaching aspect of the role as separate and not impacting each other.

Although this was only a small part of the data, it was one which the subject leaders spoke of with passion. While the subject leaders saw this as an important tension there was no indication from the more open questions in the questionnaires or documentary analysis that schools saw a real tension here. The discussion chapter explores this tension some more. Compromise in terms of student learning was hard for first time subject leaders to come to terms with, and one which they were willing to work hard to avoid as is indicated in the section on coping strategies.

### *Management v leadership*

The literature reviewed in chapter two identified a tension between leadership and management aspects of the subject leader's role. Although this was not indicated as tension by the subject leaders and only one questionnaire indicated a tension here this lack of tension is worth highlighting. The rubric at the top of one job description said the tasks are "in respect of their leadership responsibilities" which seems to situate the management responsibilities within the overall leadership role. When asked

about the possible tension between management and leadership aspects of the role none of the subject leaders saw this as a tension. They regarded management and leadership as complementary aspects of the role.

*SL2 "I wouldn't say tensions... just a balancing act."*

*SL1 "I think leadership is keeping your eye on the big picture... not getting caught up with all the little things, and yet the little things are important, if you ignore them the big picture stuff doesn't happen."*

The mix of management and leadership responsibilities was seen as tension on one school questionnaire which saw the balance of being "time managers-being 'leader's" as an issue for first time subject leaders.

However in discussing issues they did express concern at the difficulty of coping with the amount of paperwork, the immediate demands and not necessarily having sufficient time to keep the big picture and vision in mind. This was expressed more as a role size problem rather than a tension within the role. The difficulties here were also linked to the lack of role clarity which will be considered in the discussion chapter. The relationship between management and leadership is shown in Figure 4.2 with both clearly understood as being within the rather large role of subject leader. The discussion in chapter five relates this finding back to the literature.

### *Family v subject leader*

Another tension identified, and worthy of mention was that between being a member of a family and being a subject leader. One subject leader had put off applying for subject leaders roles until the children were older to avoid the conflict. Another subject leader who had children after taking up the role had left the subject area in maintenance mode for period while putting family first.

*SL2 "but with young family I'm the last one in the department here at ten past eight... and I'm up the drive by four... in six months it will get better."*

A third subject leader had made temporary childcare arrangements while a major project was on but had continued these arrangements in order to be able cope with the demands of the subject leader role. Notwithstanding these arrangements subject leaders still indicated taking work home impacted on family life.

Being a subject leader and a colleague, and also being a teacher and a subject leader were clearly indicated as role tensions for first time subject leaders. The first of these tensions was supported from the questionnaires from schools. While some of the subject leaders were indicating they have strategies to cope with these tensions these strategies were not used by all subject leaders. These tensions are discussed in the next chapter while the following sections looks at how first time subject leaders try to cope with the issues of role clarity and the tensions in the role.

## **Coping strategies**

Finding ways to cope with the demands and tensions within the subject leader's role were another issue apparent in analysis of the interview data. First time subject leaders described a small range of strategies they used to help them cope with the role and the tensions within the role. They also indicated that they were aware of the need to develop more strategies. There was no evidence from the documentary analysis and the questionnaire analysis indicating how first time subject leaders cope with the role. The nature of coping strategies means that they contribute to the links between issues in the model, particularly those shown in figure 4.2.

The main coping strategies identified by first time subject leaders were delegation, time management, or putting in extra time, and non completion of some tasks.

Delegating work to other staff was indicated by a number of subject leaders as a way of coping with the role size, while two of the subject leaders also thought that delegating helped build the skills of others and was part of their development.

*SL5 "I was talking to a year two teacher who's... surprised at the amount I allow a year two teacher, or any teacher, I'll say let's get together and put together the social studies units for example"*

One of these subject leaders clearly had a view that they were developing future leaders and not just working with a team of teachers.

*SL1 "I see my role as trying to encourage the other leaders to take, you know grow as opposed to being the person to make things happen."*

Another issue for those that delegated work was worrying about the quality of the work, and monitoring the work being an extra task. Being able to trust that work will be done was important for subject leaders, but building up the trust, and systems to achieve this were also important.

*SL2 "so I had set everything up, systems in place and everyone knows their roles and most things actually get done... I've got confidence that I can just go to the box and I know all the work's there."*

Setting these strategies took time and energy however

*SL1 "At first it was like everybody wanted to come and consult me about things, now they're running with them and come and tell me... still not terribly successful with some people."*

In a smaller department one subject leader indicated that the department size meant that there was little scope to delegate tasks saying:

*SL3 "I mean there's only two of us... we're a small department makes it hard."*

Another subject leader was also conscious of the problem of over delegating and putting too much of a burden on already busy teachers.

*SL6 "I still feel time management is an area I need to work on as well as delegating... the tasks I impose on them have to be relative I suppose."*

While delegation was seen as an appropriate way of sharing the burden of the role there were clearly tensions within this related to how the activities were framed and how much delegation was appropriate. This is shown with the tension between the role and colleagues in **Error! Reference source not found.**4.2.

Managing time was an important aspect of coping with the role size. Two subject leaders said they specifically allocated time away from the job, and this was important in coping with the size of the job and keeping their life in balance.

*SL1 "other times I take time out for myself... I'm not going to let myself be killed by this job"*

And when asked whether this was easy or not

*SL1 "No, very hard, but I'm conscious that you're a better person if you do, I think you're a better leader too."*

Another subject leader commented

*SL6 "I go to the gym and I plan that into my day... the time is set aside... and I need to make sure I'm there."*

No other subject leaders spoke of taking time out for themselves. Working harder, or longer, to cope with job was indicated with subject leaders saying that they.

*SL3 "I put more time into it"*

*SL4 "Just work long hours."*

Although they do suggest trying to put a limit on the hours worked

*SL4 "I took advice... she said just work from 8 to 5 each day, but sometimes that turns to 8 to 6 or 8 to 7, it hasn't gone 8 to 8 yet but that's because I'm working at home and working at weekends."*

Time management issues were clearly related to role size and are shown by the size of the role in **Error! Reference source not found.**4.2.

Another strategy mentioned by a number of first time subject leaders was ignoring some work and waiting to see if it was really required.

*SL3 "Some of them I just ignored and they went away..."*

*SL5 "I've ignored it... it's on the to do list."*

*SL1 "Just be aware that I can't do everything and I don't need to do everything."*

*SL2 "If it's really urgent for someone they're going to come chasing me."*

This strategy was described as being the result of necessity to cope with multiple demands, but was hard for first time subject leaders.

*SL3 "I certainly felt I was drowning for the first few months because there seemed to be so much coming at me."*

As with time management task non-completion was a feature of coping with the role size illustrated in the model.

Compartmentalising the subject leader role as separate to their work as a subject leader or as a colleague was another strategy used by a couple of subject leaders.

*SL6 " they're two separate jobs I feel."*

*SL2 "Sometimes you've got to put your leader's hat on... I find it quite difficult within the department."*

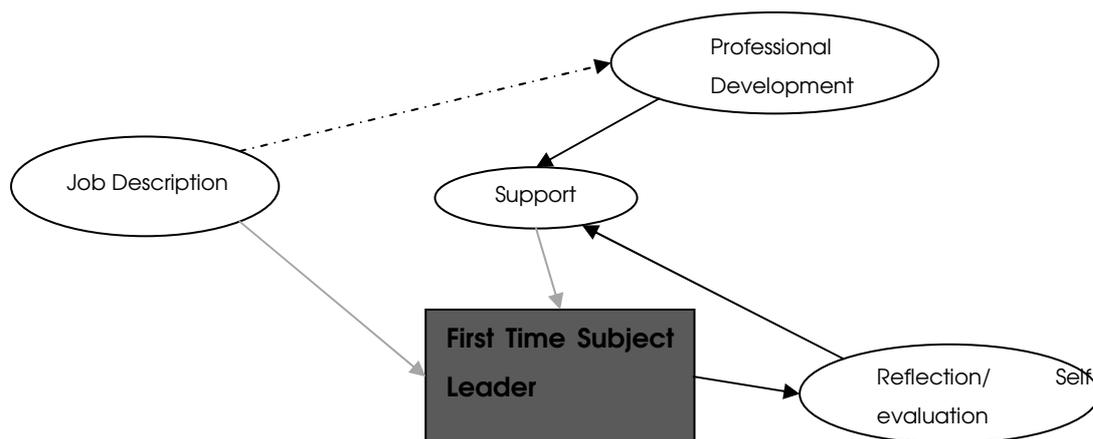
This strategy was consistent with the separate subject leader job description in the documents showing the subject leader job as a separate one to the teachers role. The strategy did not indicate how the subject leaders put boundaries on each job and seems to be avoiding the tension rather than dealing with it, shown with the tension between teacher and subject leader in **Error! Reference source not found.**4.2.

While subject leaders showed a small number of strategies to cope with the role and its' tensions these had not come easily. The school questionnaires did not indicate how first time subject leaders coped with the tensions although there was some indication of support from the school. Many coping strategies had been discovered by trial and error, or by the subject leader having to go and seek advice about what to do. The coping strategies had sometimes left subject leaders feeling uncomfortable about whether they were doing the job properly and indicated the need for support for first time subject leaders. Coping strategies will be discussed further in chapter five.

## **Support**

The provision of support was an important theme for all of the subject leaders throughout the interviews. Support was seen as being distinct from

professional development, coaching or mentoring but included providing access to these. Support was seen as dealing with immediate issues and accessing local knowledge about how things are done. Development was seen as becoming more prepared for dealing with issues ahead. Subject leaders noted that support came from many quarters but the support of senior leaders in the school was most significant. Other sources of support were other subject leaders, colleagues, students and family and friends. Documentary evidence related to development rather than support and will be examined in the next section but senior leaders did cover the issue of support. The issues related to support of first time subject leaders are illustrated in Figure 4.3.



**Figure 4.3: Factors influencing support for first time subject leaders**

All the subject leaders had accessed support for the role, but they did not indicate a structured provision of support, shown by the gray arrow in Figure 4.3. The lack of role clarity and structured provision of support was problematic in accessing support. All the subject leaders were reflective and used this reflection to identify their need for support, shown by the solid arrows in Figure 4.3.

### *Senior leadership support*

Support of senior leaders in the school was a key aspect of the support subject leaders received. Three subject leaders described how support from senior leaders commenced prior to appointment when they were encouraged to apply for subject leader positions.

*SL3 "I said 'no', I didn't think I had the time... there was enormous encouragement for me to do it and they were convinced that I was capable"*

The school questionnaires suggested that schools provided structured support for first time subject leaders, "support and involvement of SLT" was important for first time subject leaders.

Post appointment all six subject leaders indicated that knowing senior leaders had confidence in their ability to do the job was important, but was not enough. Two subject leaders, both external appointments, indicated that they felt unsupported by senior leaders in their first year because they felt the senior leaders did not make time for them, or because they did not know who to approach for support.

*SL4 "I guess I could talk to somebody if I could figure out who was a good person to talk to."*

One of these indicated that part of this was a mismatch between the subject leader and senior leader who was looking after them.

*SL2 "When I was first here the DP I was associated with... I wasn't aware of the support we were supposed to be given... we had hardly any contact. I've been tacked onto this other (DP)... we've got a stronger relationship"*

Several subject leaders noted that knowing who to approach for support was important and that being an internal appointment meant that they had this knowledge of school culture prior to their appointment.

*SL1 "I can imagine it's hard if you didn't know the system and didn't know the school, but I'm not afraid to go and ask for what I want."*

This lack of clarity in accessing support is represented by the gray arrows in Figure 4.3.

The relationship between the senior leaders and the subject leaders was seen to be important for first time subject leaders to feel supported and to be able to access support. Most subject leaders indicated it was important to have senior leaders who made time for them, and with whom they could speak in confidence.

*SL2 "I've got the deputy principal... if I need to moan and groan... I know it's not going to be spread around."*

Questionnaires responses suggested that lack of time for this support was an issue for both subject leaders and senior leaders. All subject leaders expressed their appreciation about the time senior leaders were willing to give to provide support when it was available. Three first time subject leaders expressed the view that with lots of other tasks there was not always the time available to access support, and that they were not always confident to impose on others time.

*SL3 "I don't like running to them all the time for help... I feel I should make more of an effort to sort it out myself."*

While support in terms of time, confidence and advice was important so was a sense of being trusted in their subject area. All the subject leaders expressed the opinion that they were given significant autonomy in their area

of responsibility, particular in relation to curriculum, resourcing and budgets, and that their ideas were listened to and respected.

*SL2 "If you've got a good idea, and it's a valid idea, then you get support from the top."*

This was interpreted by subject leaders as being indicative that they were trusted to run their subject area well.

Having senior leaders teaching within the subject area was also seen as helpful in accessing support, both in terms of understanding issues and being available.

*SL5 "in fact it probably really improved out relationships with those DPs... because they're working with us."*

*SL6 "what's really disappointing is that there are no maths teachers in the senior leadership team"*

The support role of senior leaders within the school organisation is important because, as has been shown above, it provides first time subject leaders with a source of both practical advice and emotional support. This issue is picked up again in the discussion in chapter five.

### *Subject leader support*

All the subject leaders had sought the advice and support from other HoDs, either within the school or externally. Most had made links with other experienced HoDs, often not within their own subject area.

*SL4 "I talked to the HoD there at my old school, of science, who's an incredible HoD, about organisation and how to get things done."*

*SL5 "One of the other HoDs, HoD English, has taken me under his wing and we've had quite a few chats about what needs to be done."*

Questionnaires indicated this "strong support from key colleagues, eg fellow HoDs" was a feature of school provision. Subject leaders indicated that they had to find this support, it was not planned for. This suggests it may be an aspect of school culture rather than deliberate planning. One first time subject leader described linking up with other first time subject leaders in order to create a network of mutual support.

*SL6 "We came away with... a network of HoDs, we set up an email network and whenever we have an issue... we jump on the network and whoever's out there can answer the question."*

Subject leaders have a lot of good will towards supporting each other that was reflected in this data. For first time subject leaders the issue was tapping into the available support.

### *Accessing support*

Accessing the support that was available was a problem for all the subject leaders. While they were aware that the support was available they had to find that support for themselves, it was not readily offered, shown by the arrow direction in Figure 4.3.

*SL2 "So it's more sort of left to my own devices"*

*SL1 "I've been around long enough that... I know where to go to."*

*SL6 "I say I'm getting support but I'm having to go out there and find it."*

This was problematic for some subject leaders who were not readily aware what support was available or how to access that support. This was

particularly true for those appointed externally who were not aware of the support systems and did not have established relationships in the school.

*SL4 "I am new to the school as well, I don't really know anybody so it becomes awkward."*

*SL3 "But it's knowing what to ask – that's the key."*

Many of the first time subject leaders spoke of the need for a more structured support system.

*SL6 "A more structured type of support, more as a more formal buddying system set up where I would be buddied with an experienced HoD, a time allowance given there, like HoDs are given a first year teacher time allowance."*

*SL4 "well it would be nice to actually have a support network and have structured pd sessions"*

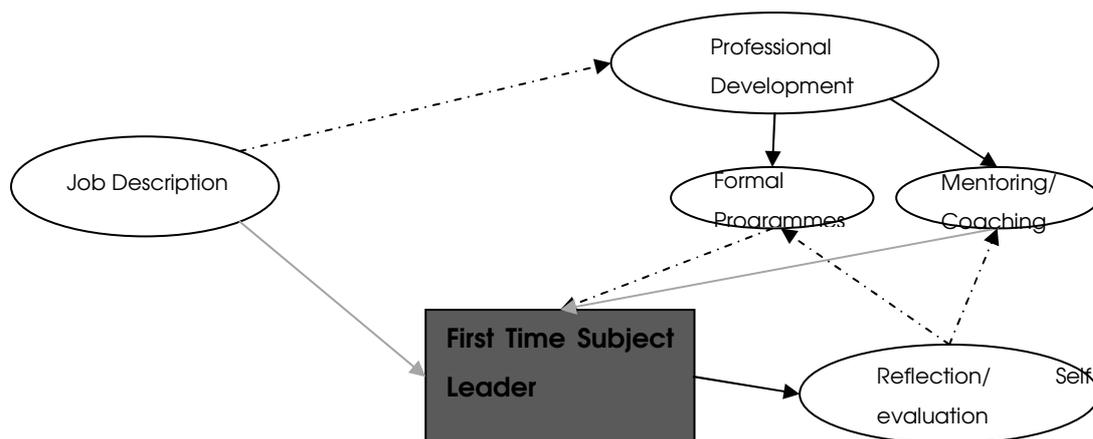
Support and how it is accessed was important for first time subject leaders as this was one of the mechanisms for helping to clarify the role, the issue raised earlier in the chapter. School questionnaires responses indicated that time factors limit the amount of actual support provided stating "continuity of support-time factor!" the lack of time for this support was an issue for both subject leaders and senior leaders. The lack of structure for support was causing problems for first time subject leaders understanding their role and coping with the role tensions.

While all the subject leaders acknowledge that support was available to a greater or lesser extent there were disparities in how the support is accessed. Barriers to accessing support were identified as being unaware of the support that was available, knowing what support was needed, time for accessing support, both time for the subject leader and for the person supporting. Some of these difficulties might be related to the lack of role clarity for first time

subject leaders. Establishing a more formal support system was seen by subject leaders as a way to improve access to support. The issue of support will be discussed in the next chapter. Subject leaders distinguished the concept of support from that of development, which is looked at in the next section.

## Development

Professional development for the role of subject leader was an issue for most of the subject leaders interviewed. The issue was linked in participants' responses to that of support, but seen as a separate issue having a more forward looking perspective. None of the subject leaders indicated that they had any form of management or leadership training prior to taking up the role. Job descriptions indicated the importance of professional development but other evidence points to both a lack of planning and lack of provision of appropriate professional development opportunities for first time subject leaders. The factors influencing the development of first time subject leaders are represented in Figure 4.4.



**Figure 4.4: Factors related to professional development of first time subject leaders**

Development was the issue with the greatest disparity between the different sources of data. The responses of first time subject leaders diverged from both

the documentary analysis and the senior leader's questionnaires. This is shown in the analysis below. The significance of this finding will be explored further in the discussion chapter.

### *Pre employment development*

None of the subject leaders had done any professional development prior to taking up the role. Four of the subject leaders had experience as assistant subject leaders but indicated that this was not adequate preparation for the role of subject leader.

*SL2 "I was an assistant HOD for two and half years...but when I came into the job it was like OK so I've got to do this...and this...and this."*

### *Provision of development*

Two main types of provision of professional development were identified, formal programmes and mentoring and coaching. There was some idea of informal development but much of this was identified as support in the previous section.

Only two of the subject leaders received some form of formal professional development during their first year in the role. One of these was a leadership course sourced by the school the other found a management course they wanted to attend and this was paid for by the school. Another of the subject leaders indicated that there was little formal professional development available, and the timing of some courses was not suitable,

*SL6 "There's not a lot, as I said there's no pd sessions out there that run at the start of the year, they all run in the middle of the year so it's sink or swim sort of thing"*

this was in contradiction to both questionnaire responses which indicated the school provided “appropriate PD put in place in a timely fashion” and “targeted PD to the needs of the HOD”, suggesting that the school had a structured programme for providing new subject leaders with professional development. There was a paucity of data from the documents relating to the professional development for first time subject leaders; this is shown by the number of broken arrows in Figure 4.4. Both job descriptions include professional development in the areas of management and administration as an aspect of the subject leader’s job, but neither job description included leadership development.

None of the subject leaders reported having any formal mentoring or coaching programme during their first year in role. However one school indicated that mentoring was part of the development provided for first time subject leaders, “work with a mentor to assist them – regular meetings”. All the subject leaders said that there was some formal link with senior management.

*SL6 “we’ve got a senior management structure in place whereby a senior leader is in charge of a particular subject area.”*

*SL5 The DP curriculum who is also, you know I’ve been in his office several times... on what I should and shouldn’t be doing”*

This may be the mentoring referred to in the questionnaires, but lacks the structure of a mentoring approach. All the subject leaders were accessing informal mentoring from other HoDs, either internal to their own school or at other schools.

*SL3 “My previous HoD and I are still in touch so I use him quite mercilessly.”*

*SL5 "HoD English has taken me under his wing... and we've had a few chats about what needs to be done."*

The informal nature of the mentoring means that it is unstructured and lacks specific goals. This approach to mentoring seems more in keeping with the support identified in subject leaders responses. One subject leader reported having had some informal coaching from the school support service TEAM Solutions, and educational advisory service.

*SL1 "suppose you would call her a semi-official mentor"*

These informal arrangements were basically supplying on demand help when problems arose rather than being more forward looking and developmental. This issue can be problematic if the informal mentors' understanding of the role is different to the understanding the school has of the role as it would add to problem of role clarity. That the professional development policies do not show evidence of planning for first time subject leader development may impact on this issue. Only one school had a professional development policy, although the other school supplied some related policies. The professional development policy did not indicate how subject leaders accessed professional development, although teaching staff, non-teaching staff and senior leadership were all specifically mentioned. Subject leaders were seen as having "responsibility over professional development for their teaching staff that is subject based." and having "budgetary responsibility for department based professional development." The lack of provision of development opportunities was a significant issue and this finding is discussed in more depth in the next chapter.

### *Personal development*

As well as school planned provision all the subject leaders had taken steps to develop themselves for the role. When asked what they had done personally to develop for the role of subject leader, first time subject leaders indicated that personal reading, reflecting on their own practice, especially when things have not gone well, and consulting with other HoDs or support staff.

*SL1 "Probably a lot of reading about management and leadership"*

*SL3 "I've spent a lot of time thinking about it... it's that reflection really"*

*SL5 "Put in a lot of ground work I guess, I've done quite a lot of reading"*

One questionnaire stated "professional reading (often directed)" was one of the factors helping subject leader development, although it was not clear if this was linked to any other activity. This may relate to the reading undertaken by subject leaders. Reflection was stated by all the subject leaders as a key to accessing development and is shown clearly in Figure 4.4. Some of the reading could have been school directed indicated by the questionnaires. This reading and reflection resulted in subject leaders creating development opportunities

for themselves. One subject leader described being aware of a particular issue in relating to others

*SL4 "and so I talked to the councillor there about how to talk to people and get the job done and mediation tactics."*

Another subject leader found a professional development course for new HoDs to attend,

*SL2 "I went off my own back and found a course about being an HoD."*

While a third created their own development opportunity, with a colleague from another school, by organising a forum for new subject leaders through the subject association.

*SL6 "We were invited by the Auckland Maths Association to run a seminar on new to the HoD job"*

In the short time they have been subject leaders the participants have shown a commitment to their development, but still found it difficult to access appropriate development.

### *Facilitators and barriers to development*

To understand the issues related to accessing professional development subject leaders were asked about factors that influenced their development in two categories, school factors and personal factors. These were split into positive and negative influences. As most subject leaders had had no formal development for the role many of these responses relate to informal development accessed individually by the subject leaders and the school factors relate to how well supported the subject leader feels in accessing that development.

There were a number of different school factors which were seen to influencing subject leader development. Different subject leaders had quite different perspectives on these although there was some agreement on a small number of factors. There was also some overlap with the issue of support, with subject leaders who felt more supported also identifying more clearly with positive influences towards development.

Relationships with other staff in the school were an important influence on subject leader's development. While questioning the level of support one subject leader noted the attitude of senior leaders was important in their development.

*SL3 "they're all open and professional and compassionate"*

While the support of senior leaders was an important factor other staff members provided the development. These other staff members included experienced subject leaders in the school, rather than senior leaders.

*SL3 "The other thing I've found useful is the willingness of other subject leaders to help you"*

Others with institutional knowledge were also important in providing development and support,

*SL6 "Teachers who are nearing retirement and they still have a wealth of knowledge."*

The questionnaires would support this perspective noting the contribution of experienced HoDs and other staff.

The sense that they were trusted by the senior leaders in the school was important for subject leaders working on their development. Interestingly this was not mentioned in the school questionnaires as a factor in subject leader's development. This was particularly important for first time subject leaders wanting to try new things out.

*SL1 "I have a reasonable budget, I'm allowed to control that myself."*

*SL5 "I have no one breathing down my back... a huge level of trust."*

*SL2 "The school are happy when we try things."*

Having other teachers respect that trust was identified as important by two subject leaders. They recognised that support from their staff for new initiatives and development was important.

*SL4 "the other teachers sort of stand back and let you do your job"*

*SL2 "they're willing to give things a go and try new things and for me that's made it easier."*

These responses indicate that schools wanted to support the development of their subject leaders, but that there were barriers to that development. These barriers included a lack of support, time and planning.

*SL6 "I find there's not always support higher up... the school has protocols and sometimes people are reluctant."*

*SL4 "It would have been nice to actually have a support network."*

One school questionnaire indicated "continuity of support – lack of time" and "lack of ongoing PD" were issues that hindered subject leader development. Lack of time also had a major impact on subject leader development, particularly for subject leaders with co-curricular responsibilities

*SL3 "really again probably the time it takes for all the co-curricular stuff"*

*SL6 "It's time, it's the biggest factor."*

Given the lack of policies and procedures for subject leader development identified in the documents this lack of real development was perhaps not surprising, the broken arrows in Figure 4.4 illustrate this breakdown in linking professional development to job descriptions and the lack of structured,

needs based provision. Together with other findings this relates to the structure of effective development programmes and is discussed in chapter five.

Subject leaders identified several personal factors that either helped or hindered their development. Some of the factors might also relate to the way subject leaders cope with the demands and tensions of the role. Largely the factors identified by subject leaders were to do with aspects of their personality that helped, or hindered them in the role. Within in this there was quite a diversity of factors mentioned, both as helping and hindering development. Some of the characteristics identified by first time subject leaders are highlighted below.

Humour was seen as important for development

*SL2 "being able to laugh at myself"*

*SL4 "I've got a good sense of humour"*

Being willing to take a risk, and accepting failure as part of growth

*SL2 "I've been willing to try things... sometimes I fall flat on my face"*

Passion for the job, and particularly for the subject area was seen by one subject leader as a driver for development.

*SL6 "Passion... I think is a major key"*

Hard work was identified as important to complete tasks, especially given the size of the role.

*SL3 "The biggest thing for me is being prepared to put in an enormous amount of hard work."*

Although hard work could also have negative consequences.

*SL3 " A tendency to over commit might be seen as a bit of a hindrance."*

Being organised was seen to be positive for development as a subject leader, and being less organised as a hindrance.

*SL1 "I'm a person that likes to do things properly"*

*SL4 "I'm messy, I'm organised but I'm messy, a little bit of a toughie"*

Describing these personality factors indicates the importance of inter, and intra, personal skills for subject leaders rather than providing a list of characteristics of subject leaders.

Self confidence, or more correctly lack of self confidence, was the most widely indicated characteristic hindering development.

*SL3 "Before I was persuaded to apply for the job it was probably lack of confidence"*

*SL1 "I felt very uncomfortable about being and HOD... but I'm actually quite enjoying it now because I'm making it mine."*

*SL6 "I know one of the things that has hindered me from succeeding perhaps is my lack of confidence in myself at times."*

*SL1 "I don't like public speaking very much"*

All the subject leaders who cited lack of self confidence also later stated they had become, or were becoming more confident, this also relates back to the changing understanding of the role identified earlier in the findings. Related to confidence one subject leaders spoke about not being assertive

*SL4 "I'm not, I don't know if aggressive is the right word, sometimes I'm not assertive enough..."*

The personal factors that influence development were not noted in the questionnaire responses nor were they anticipated in the professional development policy, but will be discussed in the next chapter. Some of these personality factors also contributed to the ability to cope with the demands of the role.

The issue of development is an important one for first time subject leaders, particularly as this is their first position with leadership and management responsibilities. The two schools in this research did not have a system for providing role specific professional development for subject leaders, although this featured on the job descriptions at both schools. The professional development policy that was available explicitly mentioned several categories of school staff, but did not mention provision of professional development for subject leaders. The data indicates that there is a need for more structured development for first time subject leaders that is supported by the school. There is also a question about the provision of development opportunities for subject leaders by outside agencies. Some subject leaders have accessed courses but others have indicated that there is limited provision. While a number of facilitators and barriers to development have been identified, and addressing these is important, it seems unlikely much additional development would occur without wider availability. The issues raised concerning development of first time subject leaders will be discussed in chapter five, including the links between the features of effective development and the findings from this research.

It is worth noting that despite the range of issues faced by first time subject leaders, and the reluctance that many stated to taking up the position most have adapted to the role and pleased to have made the move.

*SL3 "It's certainly been fascinating so far and I think it is exciting having your own department and being able to take it in the new direction you want it to be going, you need to have some ideas first but that was*



subject leaders' impact on the complexity of the role. The number of broken and unclear links between different aspects of the role result in unclear expectations and difficulty in identifying the cause of issues that subject leaders may face.

## **Conclusion**

Several issues facing first time subject leaders have been identified from analysis of the data. These findings indicate that first time subject leaders lack a clear understanding of the role they are taking up. They were not prepared either for the size of the role or for the tensions within the role. The first time subject leaders in this research indicated that when they could access support it was available and people were very helpful, however there were problems accessing support. They also reported that support systems were unstructured. Development for the role of subject leader was very limited. The issues of the subject leaders' role, role tensions, support and development identified in this chapter will be discussed in the next chapter where evidence from the literature in chapter two will be used to understand the issues.

## CHAPTER FIVE – DISCUSSION OF FINDINGS

### **Introduction**

In this chapter these findings will be discussed with reference to the issues highlighted in the literature reviewed in chapter two to develop a deeper understanding of the issues faced by first time subject leaders in New Zealand secondary schools. The issues related to role clarity, role tensions, coping strategies and support and development are considered in some depth. The issues raised are all interlinked and impact on each other and this recognised in the discussion.

### **Role of subject leaders**

Early experiences in the subject leader role quickly made the subject leaders in this research aware that the role was much larger than anticipated. The frustration of role size for subject leaders is noted in the literature, particularly in the way it requires subject leaders to make choices between attending to different aspects of the role (Brown, Rutherford et al., 2000; Collier et al., 2002). This was evident in the responses from the subject leaders, SL3 “I certainly felt like I was drowning”, and from the school questionnaires, “sheer number of things that they were expected to do.” Schools were aware of the issue here but had not been successful in making changes that will allow subject leaders to be more effective in carrying out their role.

The findings showed that unexpected and uncoordinated demands from others, particularly in senior management, were seen as indicating that the role was not well defined. The use of the term “... as required” in job descriptions left subject leaders open to such demands. This aspect is noted by Brown, Rutherford et al. (2000) and Collier et al. (2002). This clearly also

impacted on the role size for subject leaders and, as subject leaders noted, makes it harder to maintain a balance between the leadership and management aspects of the role (Wise & Bush, 1999). Indeed Wise and Bush (1999) indicate that has resulted in a situation where “this limited ‘management time’ is wholly inadequate to fulfil all the diverse tasks which now form part of the academic middle manager’s role” (p. 194). This was supported by the findings with comments such as SL4 “people kept dumping bits of paper on my desk.”

Lack of role clarity can be seen to be the result of vague description of the role in job descriptions combined with a lack of appreciation of the role size, which had not been communicated to applicants for subject leader’s positions. This lack of clarity of the role, both in practice and in research has been noted by Bennett et al. (2003) who note “some confusion as to what those expectations are” (p. 4). Unexpected demands from senior leaders created further confusion for subject leaders, SL6 “wondering if I’m doing the right job.” Interestingly while the issue of role size, or complementary issue of lack of time, was apparent both in the findings of this research and in the literature there was no suggestion by subject leaders that they were being given significant tasks that should not be their responsibility. Subject leaders who were not clear about what the role involved, and who were open to urgent demands, were not able to plan their time and experienced stress, SL4 “I got quite grumpy.” This limited their ability to fulfil the demands of the role effectively. Role clarity was a recurring theme in findings shown by the number of gray and broken arrows in figures 4.1-4.5. As an issue role clarity is seen to underlie many of the other issues raised in this discussion. The issue of role clarity is important in informing the conclusions in chapter six.

## **Role tensions**

The findings in chapter four showed that there were role tensions experienced by first time subject leaders. Subject leaders found tensions between taking on the leadership role and still maintaining their relationships and friendships with colleagues, tension between being the subject leader and also being a teacher and balancing these two roles and tension with life outside the school, particularly family life. The different aspects of the role as manager and leader were not seen to be in tension by the first time subject leaders; this is expanded in the discussion below.

The subject leaders in this research saw a tension here particularly in larger subject areas. Subject leaders reflected a need to maintain collegiality and cohesion within the subject area "I know other people are busy and you feel quite dreadful for asking people to do things" (SL4). Research shows that subject leaders retain a strong allegiance to their colleagues and are reluctant to direct colleagues when their performance is poor (Collier et al., 2002; Fletcher-Campbell, 2003). Some subject leaders highlighted the difficulties associated with having to be careful not to be seen taking sides where there were disputes between staff, "I find it quite sometimes difficult ... people might be slagging a teacher off and it's like I can't join in" (SL2). This tension has been noted by O'Neill (2000) although Brown and Rutherford (1999) have suggested that subject leaders do not find this tension irreconcilable. The internally appointed subject leaders in this research, who had prior relationships with staff, seemed better able to cope with this tension. The research findings show that this tension was recognised by the schools in this research, questionnaires cited "changing relationships", "credibility issues" and "tensions from staff who resent them getting the job", although only limited support in coping with the tension was reported by subject leaders. The recognition of this tension might have been because where this tension produces conflict the issues were likely to be raised with

senior leaders in the school. Leading and managing staff is an important aspect of the role of subject leader. This was particularly identified as an issue in larger subject areas in this research (James & Aubrey-Hopkins, 2003). Finding ways to deal with this tension will be important to ensure that subject leaders are well able to fulfil this aspect of their role. Building positive relationships with staff is an important part of resolving this tension (Poultney, 2007).

Subject leaders saw themselves primarily as working to improve learning in their own subject area (Wise & Bush, 1999). Their own teaching was important to them as was being a role model for their colleagues (James & Aubrey-Hopkins, 2003); both were aspects Dinham (2007) identified as important for effective subject leaders. Subject leaders in this research indicated that role modelling could be positive or negative in terms of commitment, or overworking. Most of the subject leaders in this research echoed evidence from the literature that taking on the subject leader role negatively impacted their own teaching, SL1 "they suffer in terms of marking...preparation." The impact came from two sources, time demands that impacted on preparation and marking, and interruptions to the teachers' lessons. The subject leaders interviewed particularly commented on the first aspect of this tension. Glover and Miller (1999) have commented that some subject leaders are better able deflect interruptions than others, and from the subject leaders interviewed it would seem that these subject leaders were able to do that. This has been seen as an important feature of effective subject leaders by Dinham (2007). It is perhaps surprising that given the importance of teaching and learning to the role of subject leader, and the important role subject leaders have in improving learning (Harris, 2001), schools in this research did not identify this as tension for subject leaders through the questionnaires. As a result first time subject leaders have been left to find their own ways of managing this tension.

The first time subject leaders reported a tension between the role and family life. While this is a tension external to the school it was an issue felt by subject leaders. Literature has noted the time factor of the role, and the need to take work home (Collier et al., 2002; Glover & Miller, 1999). In one case in this research a subject leader put off seeking promotion because of this reason SL1 "I always resisted being a subject leader, my family has always been important to me but my children have long since left home", and another only took up the position reluctantly. If unaddressed this issue could limit the ability to recruit and retain subject leaders (Fletcher-Campbell, 2003).

The dual role as a manager and leader has been described as a tension within the literature (Fitzgerald, 2004; O'Neill & Flecknoe, 2002). This dual role is described within the job descriptions at the schools in this research. The subject leaders in this research did report that management aspects of the role tended to dominate their work, SL4 "there's so many little fiddly bits to do", and they would have appreciated more time to focus on leading their subject area, particularly for the leaders of larger subject areas, this again is consistent with the literature (Collier et al., 2002; Hobbs, 2006). The subject leaders in this research did not regard this as function of tension between the two aspects but rather a consequence of the size of the subject leader's role combined with the immediacy of some of the more management type tasks. While the subject leaders in this research were able to articulate a difference between management and leadership and identify these as two distinct aspects of the role none of the first time subject leaders identified a tension here. This reflects ideas in recent literature showing subject leaders becoming increasingly aware of the dual aspect of the role (Bennett et al., 2003; Kerry, 2005; Rhodes et al., 2008). Some literature has suggested that a solution to the management and leadership tension would be separate the two functions into two roles (Glover et al., 1999; Kerry, 2005) however if there is no problem it is questionable why this would be done. It seems unlikely that the subject leaders interviewed would concur with this as they saw the two

aspects as complementary. Indeed the subject leaders identified both aspects as essential aspects of their role and the importance of balancing these aspects. The real problem with this issue was one of role size and this needs addressing to resolve the problems here.

The tensions experienced by the first time subject leaders in this research are consistent with the literature. Schools were aware of tensions between the role of subject leader and colleague, perhaps because these may get played out more publicly on occasion, but did not indicate an awareness of the tension between the subject leader role and the still significant role as teacher that subject leaders retain. This suggests that schools are not fully appreciating the complexity of the role and the tensions that are inherent as a result (Ribbins, 2007). The effect of the role on family was an issue for first time subject leaders and may be a factor for schools in recruiting and retaining subject leaders. While first time subject leaders did not see a tension between leadership and management they did have problems with the role size. These tensions are new to first time subject leaders, who do not necessarily come with strategies to manage them, which are reflected in the conclusions chapter. The lack of strategies to manage these tensions is a factor linked to the lack of pre-appointment development and the inexperience in the role. These contributing factors are picked up later in this chapter.

### **Coping strategies**

Delegation was identified as an important strategy for subject leaders (Wise & Bush, 1999), and this is backed up by the subject leaders in this research, although the degree to which they were able to delegate varied both by the confidence subject leaders had in others and by the size of department, SL3 "I mean there's only two of us", consistent with Glover and Miller (Glover &

Miller, 1999). Another concern for first time subject leaders was the worry about imposing an unfair burden on others, although at least two of those interviewed were able to view this as providing development opportunities for their staff, a feature that Dinham (2007) identifies in effective subject leaders. Making this transition to viewing delegation as development, and building staff up to this understanding had not been easy for these subject leaders. More support and development in understanding the role is required to help first time subject leaders make this transition.

Limiting time spent on the job was an important strategy identified by most subject leaders, although they reported that they do not always stick to their plan, SL4 "just work from 8 to 5 each day, but sometimes that turns to...8 to 7." This reflects the notion of O'Neill and Flecknoe (2002) who suggest subject leaders should strategically decide what not to do, although the findings of this research did not indicate that first time subject leaders were being strategic in this way, they were simply trying to manage the role size, school questionnaires showed that schools were aware of this issue but were not addressing it. Attempts to limit the working hours were tempered for first time subject leaders by the sense that they needed to complete everything and felt guilty about not doing so. A related coping strategy was that of putting work to one side and waiting to see if it was really required. This seems to be a pragmatic approach particularly when there were a large number tasks allocated in a short time (Brown, Rutherford et al., 2000) rather than the strategic approach suggested by O'Neill and Flecknoe (2002). Another strategy that some subject leaders used to cope with the inherent tensions of the role was to compartmentalise the role, being a colleague and being a teacher.

A key coping strategy identified by the subject leaders interviewed was being able access support when required. A number of researchers have commented on links between subject leader effectiveness and school

structures (Brown, Boyle et al., 2000; Glover et al., 1999; Harris, 2008). School structures affect how easy it is to access support, and can additionally add complexity to the subject leader's role by having multiple lines of communication (Busher & Harris, 1999). The findings of this research did not indicate a difference in the ability of subject leaders from each school to access support, or the demands placed on them even though they had different structures. What seemed to be important was for externally appointed subject leaders to understand the structure in order to be able access support, SL1 "I can imagine it's hard if you don't know the system", and this would seem to be consistent with Robinson (2008). Internally appointed subject leaders had knowledge of the support structures and culture that facilitated access to support (Rudman, 2002). The participating schools indicated that they provide support but subject leaders suggested this support should be more structured.

First time subject leaders found it hard to adapt to the role and develop coping strategies. Unfamiliarity with the role, which was not clear, and role tensions created difficulties for the first time subject leader. Without strategic coping strategies the role could grow to an unmanageable size and tensions unresolved, leaving the subject leader stressed and feeling that things are out of control. Structured support and development, discussed in the next section, would help first time subject leaders develop coping strategies.

## **Support**

The findings reported in the last chapter showed that all the first time subject leaders in this study were able to access support, either inside or outside the school. Subject leaders identified support as being distinct from development, although availability of support linked to the ability to access development. First time subject leaders, especially those who were externally

appointed, often did not know what support was available, or how to access the support. Because of the poor role clarity subject leaders did not always know there were tasks to complete and as a result they were not aware of the need to access support. The availability of time for accessing support was a problem both for the subject leader and for the schools, as indicated in one questionnaire “continuity of support – time factor”, an issue also noted by Brown et al. (2002).

Support may be found internally or externally, with internal support being the main source of support. The findings indicated that the ability to access support was related to school organisation, culture and the subject leaders familiarity with these, SL4 “if I could figure out who was a good person to talk to”, this is reflected in the literature on distributed leadership (Harris, 2008). Support as a separate issue for first time subject leaders was not apparent in the literature, being more associated with the idea of mentoring (Hobson, 2003; Simkins et al., 2006), or organisational culture (Gill, 2006; Piggot-Irvine, 2006). The findings of this research would suggest that support was regarded by the subject leaders as being distinct from development, although there were links between the two, with support seen as being an important facilitator of development. Support refers to aspects of socialisation for the role as well a means for accessing answers to pressing questions (Rudman, 2002). While the literature suggests that school restructuring has positive impacts for the support and effectiveness of subject leaders (Glover et al., 1999), restructuring does not guarantee this support, the restructuring has to be purposeful (Fitzgerald & Gunter, 2006). This suggests that some of the issues of support indicated by subject leaders could be managed through restructuring the support mechanisms in the school, and reorganising the roles. The two schools in this research had different structures but subject leaders experienced similar issues in regard to accessing support. Restructuring means that schools can focus on the roles and relationships that

allow support (Bennett et al., 2003). Improved support structures would improve role clarity as well as support.

All the subject leaders reported reflecting on action as part of their practice. This reflection was used to determine if they could solve an issue themselves or needed to access further support or development. In doing this first time subject leaders were demonstrating an aspect of effective development (Robertson, 2005). The lack of a structure for accessing support and development meant that the potential gains from this reflective practice here were not fully realised.

## **Development**

The paucity of provision for the development of subject leaders highlighted in the literature (Adey, 2000), and particularly in New Zealand (Organisation for Economic Cooperation and Development, 2007) is supported by the findings of this research. One subject leader stated “There’s not a lot, as I said there’s no pd sessions out there that run at the start of the year” (SL6). Job descriptions recognised the need for development but the reality was that it was often not provided, or the timing of provision was inappropriate which has been identified as an issue in effective development (Belling et al., 2004). Where development had been provided it had largely been when a course was available rather than part of a planned development programme, which was likely to limit the effectiveness of the development (Piggot-Irvine, 2006; Timperley et al., 2007). The implication of such courses is that the content is determined by the provider rather than arising from the practice of the subject leaders, again this was likely to impact on how much practice was improved by the development (Robertson, 2005). While this research did not seek to evaluate the effectiveness of development received subject leaders reported picking up a few ideas from development programmes

rather than a substantial change in practice, SL1 “not all of it have I put into practice...you can only grab a few ideas.” This suggests that the development offered was not closely linked to practice and did not meet needs in terms of transforming practice. One subject leader who indicated that the programme they were on was more extended reported gaining greater confidence in leadership. Subject leaders also indicated that they had made their own steps to develop for the role, “I went off my own back and found a course” (SL2). Commitment to their development is part of the job description, and also seen as characteristic of effective subject leaders (Dinham, 2007). A personal commitment to development was important in achieving the goals of a development programme (Kochan et al., 2002; Piggot-Irvine, 2006). This suggests that the role must be more clearly defined before a programme can be planned, and so there is a link with the role clarity issue here. There are implications here for professional development of first time subject leaders.

The findings suggest a difference of opinion between subject leaders and senior leaders over the provision of mentoring and coaching. The support identified by subject leaders was termed mentoring by the senior leaders. Mentoring and coaching have been identified as important aspects of leadership development, including for first time subject leaders (Hobson, 2003; Simkins et al., 2006). The lack of a formal mentoring approach in the participating schools might be seen as missed opportunity to assist the development of subject leaders. One subject leader noted the mismatch between the mentor and mentee, “When I was first here the DP I was associated with... I wasn’t aware of the support we were supposed to be given” (SL2). Matching mentor and mentee has been shown to be important for mentoring (Hobson, 2003; Robertson, 2005). The majority of first time subject leaders commented on the irregular meetings (Simkins et al., 2006), “it’s time, it’s the biggest factor” (SL6) and from the questionnaires “continuity of support – lack of time”. The findings show that this reflects the time pressure

on both the subject leader and the senior leaders (Robertson, 2005), although when subject leaders did meet with senior leaders they suggested that they benefited from the time spent, even though other tasks might not have been achieved. This reflects the importance of planned and structured mentoring that focuses on the needs of first time subject leaders (Simkins et al., 2006). The development will then be linked to the role and will help provide further role clarity, which has been a recurring theme in this research.

Links with external providers are features of effective development programmes (Bennett et al., 2003; Timperley et al., 2007) and the subject leaders in this research sought external development opportunities. They reported that there is a lack of provision of such programmes and the timing of the programmes was not suitable, which further limited their effectiveness (Belling et al., 2004). Job descriptions described professional development as part of the subject leader's job, but the lack of provision made this difficult for first time subject leaders. One of the subject leaders set up a forum for first time subject leaders in their subject area and subject leaders who had "been HODs for three years or more turned up" (SL6) indicating the need for more provision. It seems that first time subject leaders are looking for development opportunities but finding the opportunities very limited. External agencies are not making opportunities available in a way that first time subject leaders can access. Filling this gap in provision will help provide structured development and assist schools in developing their first time subject leaders.

The first time subject leaders in this research found it hard to identify the factors that impacted on their development. This might be because of the limited amount of development they had experienced and the short time that some had had to adapt to the role. In relation to organisational factors that influenced development a culture of trust and mutual support was identified by subject leaders and these were important factors identified by Gill (2006). Subject leaders also identified the fact some of these factors are

not formalised created a barrier to development. Again, in agreement with Gill (2006), subject leaders identified time as major barrier to accessing development. Gill (2006) and Harris et al. (2003) suggest that planning for leadership development can overcome some of these barriers, but this planning was not evident in the participating schools as shown by the documentary analysis, and the lack of a professional development policy at one school. There was no evidence to determine if schools regarded the appointment and development of first time subject leaders as part of continuum of leadership development as suggested by Margerison (1991). This gap in evidence could further relate to the issue of role clarity if it is an indication that schools are not planning for succession.

Lack of self confidence was the main personal barrier to development identified by subject leaders, SL3 "it was probably lack of confidence" and this agrees with Gill (2006) main barriers to development, although none of the subject leaders interviewed cited stress as an issue in relation to development. Lack of confidence was related to the lack of role clarity, role size and uncoordinated demands which left subject leaders "wondering if I am doing the right job" (SL6). The subject leaders identified a range of personality factors that they saw as important in their own development, and agree with the factors identified by Dinham (2007) as characteristics of effective subject leaders, including passion, or enthusiasm, willingness to work hard, taking on new initiatives and being non-dogmatic. Knowing more clearly what the job requires of them would help subject leaders gain confidence. The subject leaders demonstrate that they have the personal qualities that will enhance their development; they just need to be clearer about what role they are developing for.

First time subject leaders are experiencing their first position with management and leadership responsibilities. The role requires skills that have not been required by the subject leader previously. Development provides

the opportunity to build up the skills required for the job and assist the subject leader into the role. Providing structured development means that the role can be learnt without unnecessary mistakes being made, and can help provide tools to deal with role tensions. Effective professional development will however need the role to be clarified first. There is also a need for appropriate courses for first time subject leaders to be provided by external organisations. Schools need to consciously plan for the development of first time subject leaders, and this needs to be included in professional development policies. These ideas help shape the conclusions and recommendations in the next chapter.

## **Conclusion**

The discussion has found that most of the findings from this research are consistent with the literature. The problem of role clarity and the lack of access to support and development are major issues for first time subject leaders. Role tensions found in this research are consistent with those identified in the literature, with the exception of the tension between management and leadership, which would seem to reflect a generally greater awareness of the difference between leadership and management.

The discussion of the findings has shown that the issues faced by first time subject leaders are interrelated. In the next chapter the implications of the research are considered and some recommendations made.

## CHAPTER SIX – CONCLUSION

### **Introduction**

This research has examined the issues facing first time subject leaders in New Zealand secondary schools. The research was prompted by reflecting on my own experiences as first time subject leader. This chapter draws conclusions from the findings of the research. The implications of the findings are discussed with reference to the theoretical model developed to understand the issues facing first time subject leaders. The implications raise issues that are reflected in the recommendations for practice and further research.

### **Tensions for first time subject leaders**

The first time subject leaders in this research understood both the leadership and management aspects of the role and were able to articulate a difference between the concepts of leadership and management. Fundamentally all the subject leaders considered themselves to be leaders of learning, and seeking to improve learning outcomes for students was the main driver for them taking on the role, sometimes reluctantly, to begin with. First time subject leaders found a tension between still being a teacher and being a leader of learning for others. The responsibility for leading learning was seen to involve improving the skills of staff within the area of responsibility. Tension between being a colleague to staff and being a leader was an issue for first time subject leaders. One area of leadership that was not well understood by first time subject leaders was their contribution to whole school planning. First time subject leaders understood that a range of management activities were necessary in order to facilitate the improvements they sought to bring about and so did not see leadership and management being in

tension, rather the two aspects are regarded as complementary to each other. An issue for the first time subject leaders was that management issues tended to take precedence in their daily activity, and unplanned and unanticipated interruptions were a problem. This meant that first time subject leaders found that management activities tended to dominate their work at the expense of leading learning. This was understood by subject leaders to be a result of lack of role clarity and of the size of the subject leader's role.

### **Organisational factors and professional development**

Organisational factors that affected the support and development of first time subject leaders are the organisational arrangements for support. These arrangements were unstructured and many subject leaders were unaware of how to access support. Internal appointees had institutional knowledge that allowed them to access support more easily. Time was another key factor that impacted the ability of organisations to provide, and first time subject leaders to access support (Robertson, 2005). A lack of planning for the development of subject leaders was also identified as a barrier, and where development was offered it was not linked to the job description or practice. When subject leaders were able to access support it was freely and willingly given which suggests a more structured support system would be of great assistance to first time subject leaders, particularly with regard to coaching or mentoring. The lack of a clear role definition was also found to impact the ability to access support and development, and seems likely to be a barrier to implementing a structured support and development programme for first time subject leaders. Structured support and development, linked to a clear job description, could improve role clarity.

## **Personal factors and professional development**

Subject leaders identified a number of personal factors that influenced their development including enthusiasm, a willingness to work hard and experiment, and good interpersonal skills were seen as important facilitators of development, while a lack of self confidence was a barrier. Confidence came with growing experience and understanding of the job which again indicates that lack of a clear role description has an impact on the development of first time subject leaders, and on the willingness of teachers to put themselves forward for the role. Leaders were committed to improving in their role, to their own professional reading and to making time for reflection. They sought support from colleagues and senior leaders when needed and most sought development opportunities such as professional development courses or mentoring.

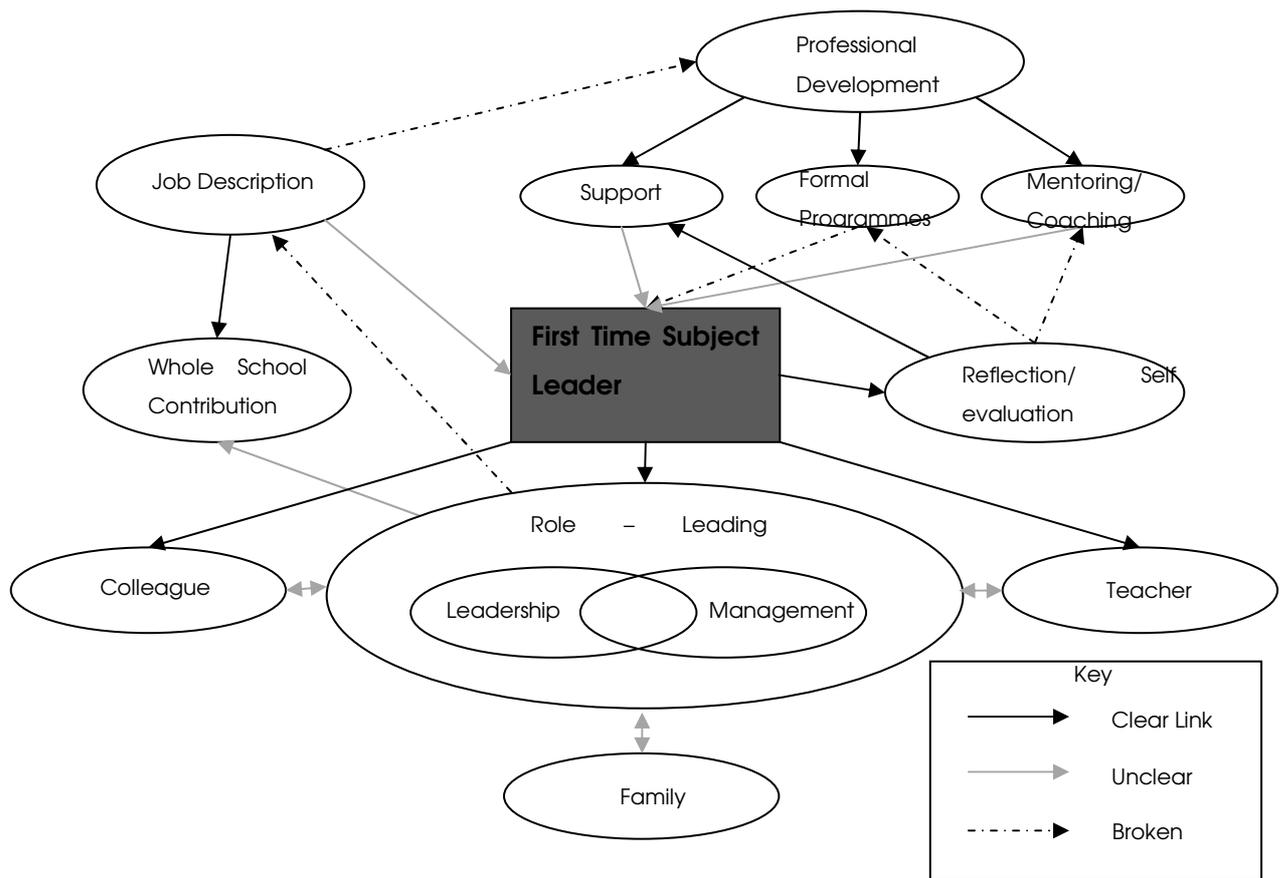
First time subject leaders identified a small number of facilitators and barriers to development, perhaps due to their limited time in the role. However there is a problem identified with time internally to add this to all the other things happening in schools. Currently the research suggests that there are limited opportunities provided by external providers for first time subject leaders. Where such opportunities are available the timing and content of the programmes is not necessarily matched to the needs of individual subject leaders, but tends to be rather generic and of some, but limited use (Piggot-Irvine, 2006; Timperley et al., 2007).

## **A model of the issues facing first time subject leaders**

The findings of this research show that there are links between the first time subjects leaders understanding of the role and how they access support and development. The data from this research has been used to develop a theoretical model to understand these links. The various components of the

model have been discussed in chapter four, but it is apparent that there are strong interrelationships between the different components. Combining these components into a single model as shown in Figure 6.1 illustrates these links. The diagram illustrates where this research found strong links with solid arrows, where the links were unclear the arrows are gray and where the links were not found and these negatively impacted on first time subject leaders the arrows are dashed.

Figure 6.1 shows the complexity of the subject leader role and this role sits in the wider school and educational context which is not shown in this diagram, this reinforces the idea of the situated complexity of the subject leaders role described by O'Neil and Flecknoe (2002). It is apparent that given this complexity, the inter-relatedness of the many aspects of the role and the lack of clarity regarding the role of subject leader can have an impact in other areas of the subject leader's work. The unclear and broken links demonstrate the need for greater clarity in defining the subject leader's role and planning support and development programmes rather than the apparently ad hoc approach currently shown. Such an approach would mean that first time subject leaders are able to develop for the role with minimum stress and the best use of time and resources.



**Figure 6.1: Factors contributing to the experiences of first time subject leaders**

## Implications of findings

First time subject leaders in these two New Zealand secondary schools face a number of key issues during their first year in the role. The issues are inter-related and relate mainly to the clarity of the role and the ability to access development for the role. These findings have implications for both research and practice.

One implication from the research was related to the first time subject leader's perception of their role as a leader of learning and a manager of people and resources. The lack of role clarity expressed in job descriptions, uncoordinated demands on subject leaders and the role size caused

problems for subject leaders in this research. Previous research has indicated that subject leaders experience tensions between these two aspects of the role (Collier et al., 2002; Fitzgerald, 2004) and both are aspects of the professional standard for unit holders (NZ Post Primary Teachers' Organisation, 2007). The implication from this small scale study is that there is a need to have clearer expectations of subject leaders, and these expectations need to be communicated well. A clear job description outlining the specific requirements of the role would help provide clarity. It is suggested that schools need to coordinate their systems so subject leaders are not met by lots of unexpected demands. A further implication for schools is ensuring that the role size is kept manageable, and extra tasks are not imposed without regard to the subject leader's role size. Since this has been a small scale study further research could provide more information about the tensions faced by first time subject leaders.

The other implications from the research were related to barriers to and facilitators of the professional development of first time subject leaders. Factors were grouped into organisational and personal factors however the research also found that the availability of development programmes was also an issue that prevented first time subject leaders accessing development. The first time subject leaders distinguished between support and development for their role. Support generally referred to accessing people when required for the subject leader doing the job. Development was seen as a more structured approach to building capability, knowledge and skills, and was not widely experienced by first time subject leaders. These factors largely reflect the findings of Gill (2006).

The schools in this research wanted to support their first time subject leaders but lacked clear structures for their support and development. The result was that subject leaders found it difficult to access support and development programmes. Schools also had difficulty finding time to provide support. The

findings of this research imply that schools could be more structured in planning for and providing support and development to first time subject leaders. In particular the findings imply that provision of a more formal coaching or mentoring programme would be helpful for first time subject leaders. This provision should be provided for in the professional development policies of schools. The support structures also need to be explained to subject leaders when they are appointed. Acknowledging the limited time available in schools suggests that schools may need to be more active in sourcing external sources of development for their first time subject leaders. The apparent paucity of provision of external programmes is reflected in the recommendations of this study.

Personality factors were a major feature of the personal factors influencing the development of the participants in this research. An implication of this is that incorporating emotional intelligence ideas into professional development programmes for first time subject leaders might be helpful. This might also assist with the lack of confidence expressed by the first time subject leaders. Confidence might be further enhanced by providing clear job descriptions to help with role clarity, and structured support programmes for first time subject leaders. Professional reading was an important factor in development identified in the findings of this research. This implies that provision of targeted professional reading, and time for reflection could be helpful in the development of first time subject leaders.

The implications from the findings of this research suggest that there are changes in practice that could assist first time subject leaders. They also indicated that there areas that are worth further research, particularly given that this was a small scale study including just two schools in one urban centre. These are shown in the recommendations below.

## Recommendations

The findings and implications of this research have highlighted some areas where practice might be improved. These improvements are linked to the issues shown as broken or gray arrows in the model shown in Figure 6.1. As a small scale study the limitations of these findings are acknowledged and further research is needed. The following recommendations for practice and research are made as a result of this study:

### *For practice*

1. I recommended that schools develop clear job descriptions that describe clearly the requirements of a subject leader and also acknowledge the tensions in role.

This research found that the job descriptions provided were worded in very general terms that did not clearly reflect the requirements of the subject leader's role. This recommendation would help resolve the issue of role clarity. It would also make the expectations of the role clear to others and help in managing role size.

2. I recommended that schools develop a structured approach to support and development of first time subject leaders that is linked to the subject leader's job and informed by their practice. This should include an element of coaching or mentoring.

There were no clear links found between the job description and the professional development of subject leaders in this research, while the informal support failed to adequately address the development needs of first time subject leaders. This recommendation would assist first time subject leaders develop into the role more quickly and effectively.

3. I recommended that schools develop and implement professional development policies that acknowledge the professional development requirements of first time subject leaders.

The research findings showed that schools did indicate provision for subject leader development in their professional development policies. This recommendation would ensure that the development needs of first time subject leaders are recognised in school professional development planning and budgeting.

4. I recommended that, as a first step, national guidelines are developed outlining the support that first time subject leaders should receive and that this be backed up with resources to provide a more formal coaching programme for developing first time subject leaders.

The role of first time subject leader is one which is a first experience of an educational leadership and management role however there is currently no nationally consistent structured pathway or development (Organisation for Economic Cooperation and Development, 2007). This recommendation would help provide subject leaders with at least a minimum level of support for the role.

### *Further research*

Further research could be conducted on the issues facing first time subject leaders:

1. across a greater range of schools and subject leaders into the issues of role clarity and role tensions faced by first time subject leaders.
2. to identify examples of best practice in the planning of development programmes for first time subject leaders.

3. into the availability and quality of provision of development opportunities for first time subject leaders.
4. to investigate pre appointment preparation for the role of subject leader.

## **Summary**

I started this thesis with my own personal story as a first time subject leader some ten years ago. My research was to examine if the experiences of new subject leaders today are different to my own experience. As a postgraduate researcher I have had access to wide a range literature which informed my study. Reading the literature gave me wide range of insights into the various factors which influence the issues for subject leaders. This reading guided me to conduct a case study into the issues facing first time subject leaders in New Zealand secondary schools.

It was a real privilege to interview several subject leaders and to hear them tell the stories of their experiences as first time subject leaders. I heard these subject leaders talk of the difficulty accessing support when they needed, the problem of not knowing what was required, the difficulty of trying to focus on long term planning and still holding things together from day to day. These subject leaders told me of the difficulty finding appropriate professional development for the role. Their stories sounded very much like my story. Comparing their words with those of the senior leaders, the job descriptions and policies helped me understand some of the issues more clearly, as I have highlighted through this study.

I suggest that first time subject leaders deserve a better start in their careers as educational leaders and managers. The issues that I have identified can be dealt with. The implications of my study and the recommendations that I have made provide a way forward that has a strong theoretical base, based

on the model I developed in Figure 6.1, but which is also grounded in the reality of school life.

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# APPENDICES

## Appendix A: Interview Schedule

An examination of the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools.

### Interview Schedule – Subject Leaders

An interview with

At

On

Interviewer: John Bennet

Demographic Questions:

How long have you been a subject leader at this school?

What is the total time you have been a subject leader?

How many management units do you have for your subject leadership role?

How much time allowance do you have for your subject leadership role?

How many staff are in your subject area?

Are there other staff in your area with management/ subject responsibilities?

How many different subjects/courses are you responsible for?

Describe the curriculum structure in your school?

Research Questions

– remember that these questions are asking about your experiences in your first year as a subject leader.

First time subject leaders role

Describe your understanding of the subject leader's role to be when you were first appointed a subject leader.

Explain how your understanding of the role changed during your first year as a subject leader.

Describe the main issues that you faced as a first time subject leader.

Prompts: Staff

Students

Resources

Management

Leadership  
Relationships  
Time  
Personal  
School

Describe any tensions you found within the role of subject leader.

Prompts; Teaching v role  
Colleague v role  
Management v Leadership

Describe how, as a first time subject leader, you tried to manage those tensions.

Prompts; Prioritise  
Delegate  
Work hours  
Reframe tasks

Tell me about any tensions you experienced between management and leadership aspects of the subject leaders role.

Support and professional development for first time subject leaders

Tell me about the support that you received from the school to develop you for the role of subject leader.

Prompts; Formal  
Informal  
Mentor/coach

Describe what have you done personally to develop for the role of subject leader.

Prompts: Formal  
Informal

Factors influencing first time subject leader development

Tell me about the school factors that have helped you develop as a subject leader.

Prompts: Time  
Appraisal  
Feedback  
Trust

Tell me about the personal factors that have helped you develop as a subject leader.

Prompts: Self belief  
Commitment  
Skills  
Belief in team/task/others

Tell me about the school factors that have hindered your development as a subject leader.

Prompts: Time  
Appraisal  
Feedback  
Trust

Tell me about the personal factors that have hindered your development as a subject leader.

Prompts: Self belief  
Commitment  
Skills  
Belief in team/task/others

Other issues/experiences

Are there any other issues or comments that you would like to contribute on your experience as a first time subject leader?

## Appendix B: Questionnaire



As the person responsible for overseeing subject leaders in your school I would appreciate your help in completing this questionnaire. You can either send it back in the stamped addressed envelope supplied or electronically to [bennetj@delasalle.co.nz](mailto:bennetj@delasalle.co.nz)

Completing the questionnaire implies consent to this data being used for the purpose of this research.

What are some of the significant issues first time subject leaders experience in their first year in the role at your school?

What are some of the tensions first time subject leaders experience in their role as leader and manager in your school?

What are some ways that first time subject leaders in your school have managed these tensions?

What support does your school offer first time subject leaders?

What are some factors that help first time subject leader's development in your school?

What are some factors that hinder first time subject leader's development in your school?

**UREC REGISTRATION NUMBER: 2008.861**

**This study has been approved by the UNITEC Research Ethics Committee from 23 July 2008 to 23 July 2009. If you have any complaints or reservations about the ethical conduct of this research, you may contact the Committee through the UREC Secretary (ph: 09 815-4321 ext 7248). Any issues you raise will be treated in confidence and investigated fully, and you will be informed of the outcome.**

## Appendix C: Principal information sheet



### INFORMATION SHEET – Schools (Principal/BoT)

#### Title of Thesis:

**An examination of the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools**

My name is John Bennet. I am currently enrolled in the Master of Educational Leadership and Management degree in the School of Education at Unitec Institute of Technology. I am requesting your help in meeting the requirements of research for a Thesis course which forms a substantial part of this degree.

The aim of my project is to examine the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools. I am particularly interested in how first time subject leaders understand the different aspects of their role, how they cope with the tensions in their role, how they access support for their role and what contributes to the success of that support.

I request your participation in the following way.

I will be collecting data using an interview schedule with subject leaders' that will take about 45 minutes to complete. I would appreciate being able to interview subject leaders at your school.

I will also be collecting data by examining schools professional development policies and subject leaders' job descriptions. I would appreciate having access to these documents from your school

Neither the subject leaders nor your organisation will be identified in the Thesis. I do hope that you will agree to take part and that you will approve my conducting research in your school. If you have any queries about the project, you may contact my supervisor at Unitec Institute of Technology, Dr Jenny Collins who may be contacted by phone: (09) 815 4321 ext 8369 or Email: [jcollins@unitec.ac.nz](mailto:jcollins@unitec.ac.nz)

Yours sincerely

John Bennet

**UREC REGISTRATION NUMBER: 2008.861**

**This study has been approved by the UNITEC Research Ethics Committee from 23 July 2008 to 23 July 2009. If you have any complaints or reservations about the ethical conduct of this research, you may contact the Committee through the UREC Secretary (ph: 09 815-4321 ext 7248). Any issues you raise will be treated in confidence and investigated fully, and you will be informed of the outcome.**

## Appendix D: Organisation consent letter

### LETTER PROVIDING ORGANISATION'S PERMISSION TO CONDUCT RESEARCH

[Organisation's letterhead]

Date

*Address letter to: John Bennet*

**RE: Master of Educational Leadership and Management**

**THESIS TITLE: An examination of the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools**

TO WHOM IT MAY CONCERN

I have been given and have understood an explanation of this research project and I give permission for research to be conducted in my organisation.

I am willing to make copies of the following documents available as part of the research;

- Professional development policy and procedures                      YES / NO
- Subject leaders' job description    YES / NO

I understand that the name of my organisation will not be used in any public reports. The documents used will be kept confidential to the researcher.

**Signature**

**Name of signatory**

## Appendix E: Subject leader information sheet



### INFORMATION SHEET – Subject Leaders

#### Title of Thesis:

#### **An examination of the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools**

My name is John Bennet. I am currently enrolled in the Master of Educational Leadership and Management degree in the School of Education at Unitec Institute of Technology. This project is being undertaken to meet the requirements of research for a thesis course which forms a substantial part of this degree. I am inviting you participate in this research.

The aim of my project is to examine the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools. I am particularly interested in how first time subject leaders understand the different aspects of their role, how they cope with the tensions in their role, how they access support for their role and what contributes to the success of that support.

I request your participation in the following way.

I will be collecting data using an interview schedule that will take about 45 minutes to complete, the interview will be taped to be transcribed by myself for analysis. I would appreciate being able to interview you at a time that is mutually suitable.

You have the right to decline to take part. If you agree to participate, you will be asked to sign a consent form. You can withdraw at any time until the completion of the interview process. You can refuse to answer any particular question at any time. You will be given an opportunity to check the transcripts and make corrections. Information that may identify you will be kept completely confidential. All information collected from you will be stored on a password protected file and only you and the researcher and the researchers' supervisor will have access to this information. You are able to ask any questions about the study at any time during participation.

If you have any queries about the project, you may contact my supervisor at Unitec Institute of Technology, Dr Jenny Collins who may be contacted by phone: (09) 815 4321 ext 8369 or Email: [jcollins@unitec.ac.nz](mailto:jcollins@unitec.ac.nz)

Yours sincerely

John Bennet

**UREC REGISTRATION NUMBER: 2008.861**

**This study has been approved by the UNITEC Research Ethics Committee from July 2008 to July 2009. If you have any complaints or reservations about the ethical conduct of this research, you may contact the Committee through the UREC Secretary (ph: 09 815-4321 ext 7248). Any issues you raise will be treated in confidence and investigated fully, and you will be informed of the outcome.**

## Appendix F: Subject leader consent form



### CONSENT FORM – Subject Leaders

**DATE**

**TO:**

**FROM: John Bennet**

**RE: Master of Educational Leadership and Management**

**THESIS TITLE: An examination of the issues facing first time subject leaders during their first year of appointment in New Zealand secondary schools**

I have been given and have understood an explanation of this research and I have had an opportunity to ask questions and have had them answered. I understand that I may ask further questions about the research at any time.

I understand that

- neither my name nor the name of my organisation will be identified in any public reports
- the interview will be audio taped and I will be provided with a transcript for checking before data analysis is started
- the data will only be used for the purposes outlined to me
- I may withdraw myself or any information that has been provided for this project up to the end of the interview process. .

**I agree to take part in this project.**

**Signed:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**UREC REGISTRATION NUMBER: 2008.861**

**This study has been approved by the UNITEC Research Ethics Committee from 23 July 2008 to 23 July 2009. If you have any complaints or reservations about the ethical conduct of this research, you may contact the Committee through the UREC Secretary (ph: 09 815-4321 ext 7248). Any issues you raise will be treated in confidence and investigated fully, and you will be informed of the outcome.**