A compromised role? Secondary school Heads of Faculty priorities during times of initiative intensity

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Abstract

Intentional educational change in the form of policy reform and initiatives is a significant feature of the present New Zealand education landscape. This is particularly evident in the secondary education sector, which is currently experiencing significant policy reform through initiatives such as the Curriculum Refresh and the Review of Achievement Standards for the NCEA qualification system. Such policy initiatives have a notable impact on the middle leaders in secondary schools by virtue of their unique positioning as conduits between strategic direction and classroom practice. In this context, they have a position of significant responsibility and influence in relation to the translation of change-motivated policy initiatives to practice.

This study aimed to explore how Heads of Faculty (HOFs) in New Zealand secondary schools experience initiative implementation in their middle curriculum leadership roles. It specifically considered the impacts that this work, and consequent intensification of workload has on the other elements of their roles, and the ways that they feel able to exercise their leadership practice in this context. A dual-methods approach was applied to this study, where eight HOFs were anonymously surveyed online, and this was followed by four semi-structured interviews that were conducted with participants who self-volunteered at the end of the survey. The use of these methods provided data that communicated the experiences of participants implementing policy initiatives as well as personal narratives to support understanding of the impacts on their roles and leadership practice. An interpretivist approach was applied to thematically analyse the findings.

Discussion of the findings generated in this study and its relationship to existing literature led to conclusions that initiative implementation contributes to a notable intensification of workload for HOFs, and that this impacts their capacity to effectively carry out other aspects of their roles. The resulting prioritisation of role-related tasks is influenced by a range of internal and external factors and the extent to which each of these influence individual HOFs is driven by a range of contextual factors.

In response to these conclusions, this study offers recommendations for future practice that are intended to support HOFs to manage their intensified workload to reach better

outcomes in their day-to-day roles and initiative implementation work. These recommendations address each of the layers of influence which structure the discussion.

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Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor used artificial intelligence tools or generative artificial intelligence tools (unless it is clearly stated, and referenced, along with the purpose of use), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

Claire Moorhead 27th September 2023.

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Chapter One: Introduction

This dissertation explores the experiences of Heads of Faculties (HOFs) in New Zealand secondary schools, and the way their roles are impacted by the work of initiative implementation. This chapter first presents relevant elements of my personal context as a secondary school middle leader and researcher of this dissertation and then outlines the similarity between this context, and others. The rationale for the research and research questions which have guided the study are then presented. This chapter concludes with a brief overview of the research design and the structure of this dissertation.

Context

I currently work in middle curriculum leadership in a New Zealand Secondary School. Over the course of completing this research study I have worked both as a Head of Subject, and as an Assistant Head of Faculty. In both roles over the last seven years, I have experienced the intensification of workload and its related challenges in relation to the pressures of initiative implementation. These initiatives have included organisational initiatives driven by the strategic vision of senior leaders in the organisations that I have worked in, and centrally coordinated initiatives in the form of Government driven reforms to curriculum and assessment frameworks. My personal experience of these challenges has been mirrored by many of my colleagues who I have worked closely with in both the work of initiative implementation, as well as the day-to-day elements of our curriculum leadership roles. This shared experience has been the subject of many formal and informal conversations over recent years within the organisations I have worked and with curriculum middle leaders in other secondary schools. Through this contextual experience, I have observed that initiative implementation creates pressure within middle curriculum leadership roles, and that this pressure is largely related to the additional workload generated by initiatives. This observation has led me to question both how Heads of Faculty[1] (HOFs) have experienced this in a range of organisations, and specifically the way this workload pressure impacts the other aspects of curriculum middle leadership roles through the process of prioritisation which necessarily occurs when workload increases.

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[1] This study specifically focuses on HOFs who are leaders of large curriculum areas which typically correspond to a learning area defined by the New Zealand Curriculum. Faculties typically comprise several subjects or disciplines. A HOF is the highest level of curriculum middle leadership in distributed leadership structures in New Zealand schools. HOFs typically are responsible for managing and leading other curriculum leaders underneath them in a distributed leadership structure, such as Heads of Department (HODs) who might be responsible for a segment of or subject within a faculty, subject leaders who are responsible for a single subject within a faculty, or course leaders.

This research study recognises that my personal context in terms of my curriculum middle leadership roles has similarities to people in similar roles in other contexts. These similarities include the widespread use of distributed leadership structures in New Zealand secondary schools. This means middle leaders across secondary schools work in similar roles with similar responsibilities (Cardno et al., 2018; Youngs, 2020). It has been acknowledged that over time, this kind of curriculum middle leadership role has evolved from an administrative management framing, increasingly towards a leadership focused position (DeNobile, 2018). With this, curriculum middle managers are increasingly involved in the work of initiative implementation, as their role straddles the classroom practice, management, and acts as a conduit to senior leadership (Robinson et al., 2009). Finally, the similarity between my context and others in New Zealand secondary schools is the increasing prominence of educational reform and related initiatives. The trend towards accountability in a self-managing school system has led to a focus on continual improvement in secondary schools, which in turn has contributed to the proliferation of initiatives both organisational and national (Gear & Sood, 2021). Therefore, my experiences of initiative implementation and those I have observed are common rather than isolated and have led to me questioning how curriculum middle leaders prioritise their responsibilities given the number of initiatives they are increasingly faced with. This shared contextual experience is informed by trends in education reform which are discussed in the following section outlining the rationale for this research study.

Rationale and Aim

Change is constant in education. As educational research is evolving, so too is educational practice and policy. In the New Zealand secondary school environment, the constancy of intentional change driven by policy initiatives is evident in the broad number of centrally constructed educational reforms which are being developed by the Ministry of Education (MoE). In the early 2020s, these reforms include, most significantly for secondary schools, the Curriculum Refresh and the NCEA Review of Achievement Standards, initiatives which will reframe what is being taught, how it is being taught, and the way it is assessed in secondary schools (Ministry of Education, 2023a). These fundamental reforms for classroom practice sit alongside a range of other reviews and initiatives led by the MoE which will influence classroom practice including the development of a Common Practice Model (Ministry of Education, 2022). In this environment it is clear that the New Zealand secondary education sector is constantly evolving. This notion that intentional educational change is continually moving through a circular cycle of “unfreezing, changing, and refreezing”, where the status quo is questioned, altered, and then cemented in a new or different form is supported by literature (Gear & Sood, 2021, p.3). The nature of this cyclical approach to change and reform is evident in Hughson’s (2022) critique of New Zealand’s curriculum changes between 2007 and 2021. In this critique, Hughson (2022) tracks how New Zealand education, largely via the MoE has moved from consensus that the openness and autonomy for teachers encouraged in the 2007 New Zealand Curriculum was world leading, towards a more prescriptive curriculum as part of the current New Zealand Curriculum Refresh initiative (Hughson, 2022). This shows that over a short period of time, attitudes to curriculum in New Zealand have been frozen, through the creation of consensus in 2007, and are in the process of changing through the current MoE curriculum initiative (Gear & Sood, 2021).

The constant nature of intentional educational reform is challenging for school leaders. Reform intensification means that strategically, school leaders are often managing the implementation of policies at different stages of the “unfreezing, changing, and refreezing” cycle simultaneously (Gear & Sood, 2021, p.3). This is complex work which sits on top of the day-to-day operations of an organisation. In addition to this, the central construction of much of the present education reform can also present challenges to school leaders. Where reform and policies are developed centrally for the purpose of being implemented in a self-governing school system these policies can be generalised in their expression (Shaked & Schechter, 2017). For school leaders, this presents a challenge in terms of negotiating what nationally mandated policy looks like in practice, while being accountable to national bodies for the outcomes of that policy (Shaked & Schechter, 2017).

In this context, Heads of Faculty (HOFs) in their role as curriculum middle leaders are central to the successful implementation of educational reform (Leithwood, 2016). At a surface level, HOFs occupy a space that seems more likely to indirectly influence students through their leadership practice than the strategic direction of the school (Cardno, 2012). However, HOFs occupy a strategically powerful space where their disciplinary and pedagogical expertise, and relational positioning privileges their ability to influence how reform and policy is implemented at a classroom level (Leithwood, 2016). HOFs specifically, are able to exercise influence over wider teaching staff in relation to reforms as a result of the legitimacy they derive from their curriculum expertise (Leithwood, 2016). In an environment where centralised reform is intensive, disconnect between the classroom and strategic direction can be mitigated by the influence of HOFs. Because of their assumed high level of disciplinary and pedagogical expertise, as well as their proximity to community as instructional leaders, HOFs have the potential to be significant policy drivers in this initiative intensive environment (Shaked & Schechter, 2019). The constancy of intentional educational reform therefore has a significant impact on HOFs, by increasing the pressure in their role (Shaked & Schechter, 2017).

Contexts where multiple reforms are being developed and implemented at once is an example of multiple intentional change, and this is an experience of reform which is increasingly prevalent in the context that has been introduced in this chapter so far. The constant evolution of intentional educational change is complex, and it can be extrapolated that where multiple intentional changes are occurring simultaneously, this complexity is increased (Gear & Sood, 2021). For curriculum middle leaders such as HOFs, this complex experience of educational change is further clouded by issues of agency. HOFs are positioned between direct instructional and strategic leadership, a space that requires them to work to implement strategic vision, at times without the space to act strategically in order to do so (Gear & Sood, 2021; Leithwood, 2016; Youngs, 2020). Agency for HOFs to lead this work is further compromised by factors such as the external drivers of centrally constructed reforms, and the pressures that are placed on them by these tasks (Shaked & Schechter, 2019).

The conditions of initiative intensity which have been described in this rationale necessarily place immense pressure on HOFs, who must act as conduits in the process of policy implementation (Piot & Kelchtermans, 2015). Although this positioning means that HOFs have the potential to positively influence effective initiative implementation, it also suggests that their workload is likely to be significantly impacted as a result of this. This has led this researcher to question what happens when the rate and volume of externally driven change is too substantial to be absorbed into HOF roles as they are currently framed and supported in the New Zealand secondary education sector.

Therefore, the aim of this research study was to explore how HOFs in New Zealand Secondary Schools experience initiative implementation in their middle curriculum leadership roles, specifically the impact this work has on the other elements of their roles, and the ways that they feel able to, and do exercise leadership. This aim is supported by the research questions outlined in the next section of this chapter.

Research Questions

This dissertation has been shaped by two research questions which intend to support the development of understanding how HOFs experience initiative implementation in the context of their curriculum middle leadership roles, and how this impacts their leadership practice in relation to their prioritisation of tasks and responsibilities.

1. What impact does an initiative intensive environment have on HoF roles?
2. How do HoFs justify their prioritising of role related tasks in initiative intensive environments?

In the context of these questions:

- *Initiatives* are understood to be projects or pieces of work seeking to change ways of working in a school as an organisation. For the purpose of this dissertation, initiatives were considered to be both organisational (specific to a school and relating to the strategic priorities of that specific organisation), or national (centrally controlled by the government and associated agencies and widely applied across schools in New Zealand).

- *Initiative intensive environment* is understood to be a context where a HOF is working towards the implementation of two or more initiatives at one time. These initiatives could be organisational, national, or a combination.

- *Role related tasks* were understood to include all tasks and responsibilities that are part of the day-to-day expectations and role held by HOFs, as well as the tasks that may be temporarily added to their roles as a result of work related to initiative implementation.

Overview of Research Design

To answer these research questions a qualitative design was used to capture the experiences of HOFs in their roles. It focused on capturing participant interpretations of their own experiences, and thus is underpinned by an interpretivist framework (SAGE Research Methods, 2021). This methodological framework acknowledges the significance of interpretation from both participants, and the researcher in the findings which will be outlined in Chapter Four and discussed in Chapter Five. A dual-method research design was used to elicit qualitative data for this study. Specifically, a survey was completed anonymously by eight participants, and this was followed by four semi-structured interviews. The survey focused on collecting data relating to the framing of participants' roles, their experiences with initiative implementation, challenges they have faced, and decisions they have made about their leadership practice in this context. The follow-up interviews supported the construction of a narrative around the survey data by unpacking the ways that participants felt about the challenges identified or justified the decisions made about their leadership practice. This supported deeper critical analysis of the data generated in the survey. Interviews were conducted by the researcher via Zoom, Google, or other similar platform based on interviewee preference, and the audio was recorded and transcribed by the researcher. Participant selection for the survey was based on publicly available contact information, and for the interviews, selection was based on participant volunteering. This provided the opportunity for this study to reach a broader range of participants geographically, and demographically.

Structure of this Dissertation

Following this chapter, Chapter Two presents a review of literature. This review considers relevant literature relating to intentional educational change, the role of curriculum middle leaders, and a range of selected factors which contribute to the complexity of experience in middle curriculum leadership roles. These key sections support an understanding of existing scholarship relating to the nature of educational change, the work of middle leaders, and factors of potential influence in how reform is experienced in a HOF role.

Chapter Three outlines the methodological approaches taken in this research study. It begins by outlining the methodological underpinnings and research design that have been applied to this study and then justifies the decisions made in relation to this. This includes discussion of data analysis, ethical considerations, and the impact of decisions on validity.

Chapter Four presents the findings of the research study. It first outlines the findings of the survey, breaking this data down by key ideas that were expressed in each survey question. It then presents the findings of the semi-structured interviews. This data is organised by interviewee to best preserve the narrative of experience that was expressed in the interview. Within each sub-section, the findings are structured thematically based on the thematic analysis conducted by the researcher which shapes the discussion of the findings in Chapter Five.

The discussion in Chapter Five interprets the findings in relation to the two research questions which are outlined in this chapter alongside relevant literature and is supported by the triangulated thematic analysis of the data presented in Chapter Four.

Finally, Chapter Six presents the conclusions of this research study. These conclusions are presented in the form of a response to how well the research study addressed the aim, as well as the limitations of the study, and recommendations for future practice.

Chapter Two: Literature Review

The experiences of middle leaders in education are a feature of a significant amount of educational research literature that has been published over time. As school leadership hierarchies and structures become increasingly distributed, the experiences of middle leaders have changed and their roles have become more complex (De Nobile, 2018; Harris et al., 2019; Tang et al., 2022). Additionally, educational research literature demonstrates that the educational landscape is in near-constant change and development (Gear & Sood, 2021; Skerritt et al., 2021; Tang et al., 2022). Through an examination of this literature, we are able to develop our understanding of the nature and purpose of educational change, the experiences of middle leaders, and where the two intersect.

This literature review will unpack relevant literature across three sections. First, considering what literature has to say about the nature and purpose of intentional educational change, second exploring the role of curriculum middle leaders in secondary education, and finally considering important factors which contribute to the complexity of this role in a policy environment. These sections relate to key themes which emerge from the data and be discussed in this dissertation.

Intentional Educational Change

The nature of current trends in educational reform and intentional change are challenging for those tasked with implementation. These challenges include the intensification of reform, its central construction, and its general expression at this middle level.

Intentional educational change is constant, and constantly evolving (Gear & Sood, 2021). This prominence of change, particular change that is driven by reform-focused policy, is widely acknowledged in educational research. Robinson (2018) draws on a wide reading of literature to support her argument that the constancy of change in education is a potential inhibitor to actual improvement. This sentiment that change is constant is also echoed in smaller-scale pieces of research, such as Gear and Sood's (2021) auto-ethnographic study which concluded that change forms a circular process in education, where we are perpetually circling through a cycle of unfreezing, changing, and refreezing (Gear & Sood, 2021). The constancy of reforms described by Robinson (2018) and Gear and Sood (2021) is particularly significant to middle leaders, who typically play a central role in the translation of policy to practice (Skerritt et al., 2021). Skerritt et al.'s (2021) study of Irish educators illustrated that significant work of enacting educational reform had tangible impacts on shaping the role of middle curriculum leaders. The difference in scope of these pieces of literature demonstrate how the constancy of change resonates with educators as individuals, in context, as well as with those who study and lead education at a broader level (Gear & Sood; 2021; Robinson, 2018; Skerritt et al., 2021).

Literature also has a lot to say about the nature of intentional educational change. Some of these features of intentional educational change are common, and relatively constant. A good example of this is the notion that intentional educational change is incremental, which is expressed in Blackmore and McNae's (2021) chapter exploring how school reform has been viewed from different perspectives in educational research. This chapter reveals that a School Effectiveness and Improvement (SEI) model has been applied internationally to educational reform and its associated policies since the 1980s. This model is cyclical, moving from planning, data analysis, development of performance outcomes, and evaluation of effectiveness, and back again (Blackmore & McNae, 2021). This model acknowledges that change is a process but also assumes that change in the form of improvement is continual and linear over time (Blackmore & McNae, 2021). Another common and relatively constant feature of intentional educational change identified in this review is its unpredictability (Blackmore & McNae, 2021). This is evidenced by looking at research from the 1990s onwards which distinguish between the relative success and sustainability of the change at the centre of the studies reviewed (Blackmore & McNae, 2021). This part of the chapter explored the limits of the SEI model which is widely applied to reform by showing that change is rarely continual and linear, and that in reality, a wide range of shifting contextual factors influence the rate and sustainability of change, a finding that is supported by Skerritt et al. (2021) in their study of initiative implementation in Irish primary schools.

This notion that the sustainability of change is variable is echoed in the work of Robinson (2018) who argues that change cannot always be assumed to causally lead to improvement in education. Specifically, Robinson (2018) argues that leading change and leading improvement are not the same thing. In the development of this argument, she posits that too much change, which literature has broadly established as a constant feature of education, can be a barrier to improvement actually occurring (Robinson, 2018). In presenting this argument, Robinson illustrates that not all change is, therefore, desirable (Robinson, 2018).

It is important to acknowledge that many pieces of educational research which explore intentional change acknowledge that the nature of change and the policies which drive it is an evolving trend (Blackmore & McNae, 2021; Gear & Sood, 2021; Robinson, 2018). A current trend in intentional educational change that is widely acknowledged in literature is that that reform is increasingly centrally mandated and controlled (Gear & Sood, 2021; Robinson, 2018; Shaked & Schechter, 2017). This central coordination of reform in many contexts including New Zealand, sits alongside increasing focus on accountability systems driving the management of educational organisations (Robinson, 2018). This contributes to an important sub-trend in centrally coordinated educational change as being expressed through generally outlined policies (Gear & Sood, 2021; Robinson, 2018; Shaked & Schechter, 2019). Although the intent of this feature of policy construction might be to support contextualised implementation at an organisational level, this often leads to the policies being characterised as ambiguous by those charged with implementing them (Shaked & Schechter, 2019). This presents a significant challenge to school leaders.

The generalised nature of centrally coordinated change policies in education could be considered to be contributing to the observable conclusion that all educational change policy does not result in sustainable change (Carlyon & Branson, 2018; Robinson, 2018). Robinson acknowledges this broadly through the argument that change and improvement cannot be consistently equated (Robinson, 2018). This is echoed at smaller scale by Carlyon and Branson’s (2018) review of literature generated in the primary education sector in New Zealand which indicated that only thirty percent of planned change was successful, a piece of data which supports that conclusion that reforms in the New Zealand context do not always bring about meaningful or measurable educational change (Carlyon & Branson, 2018).

One of the factors which could explain why some change ‘sticks’ and other policies fail to result in sustained change is the challenge that implementing policy presents (Robinson, 2018). Robinson acknowledges in her exploration of the relationship between change and improvement, that implementing and embedding policies is the hardest part of the change process (Robinson, 2018). This conclusion is supported by the argument that where planning and policy construction can be supported and driven by the expertise and motivation of a small number of people in a largely theoretical space, implementation of policy requires this vision to be integrated with a substantial number of existing practices, and in the case of centrally coordinated reform, in a range of varied contexts (Robinson, 2018).

The nature of educational change in current trends, and the challenges that reform-focused policy represents is relevant because it has a significant impact on HOFs and the nature of their roles (Skerritt et al., 2021). In an extensive review of literature conducted in Ireland, Skerritt et al. (2021), concluded that it is often middle leaders who are doing most of the high-profile policy implementation work in schools, arguing that middle leaders are often overloaded and inundated by this work. On a smaller-scale, Gear and Sood (2021) also explore the centrality of middle leaders to the work of policy implementation in schools. Gear and Sood (2021) argue that the positioning of middle leaders, between strategic leadership and classroom practice is a critical factor which makes them indispensable to this work. However, although they acknowledge that middle leaders play a dominant role in the work performed to implement policy, her study questions the autonomy that middle leaders have to act strategically in this space (Gear & Sood, 2021).

The constancy of educational change is a force which stands to impact practitioners at all levels of the education system, as each is exposed to different pressures relating to policy enactment. However, this phenomenon is especially significant for middle leaders, who by virtue of their positioning play a central role in supporting others in the process of change enactment (Cardno et al., 2018; Highfield & Rubie-Davies, 2022). Additionally, the volume of this constant change is also a concern to middle curriculum leaders. Robinson (2018) argues that where the volume of change (in the form of policies to be implemented) is substantial, this can be harmful to the achievement of actual improvement as a result of this policy implementation. For middle leaders, this is particularly relevant when considering the nature of the role they play which is explored in the next section of this review.

The Role of Curriculum Middle Leaders

The roles, responsibilities, and expectations of HOFs in the modern secondary school environment in New Zealand are part of the increasing trend towards distribution of leadership in schools (Youngs, 2020). Distributed leadership models have increased in prevalence in New Zealand secondary schools over recent years (Youngs, 2020). This is not a trend that is specific to the New Zealand educational environment- decentralisation of educational leadership and management is an established worldwide trend, and the nature of this policy environment promotes the proliferation of this leadership structure (Flessa, 2009; Heng & Marsh, 2009). In New Zealand, the bureaucratic, hierarchical structure is more pronounced in larger schools, as size provides the capacity for additional layers of leadership structure, particularly in 'the middle' (Feist, 2008). In a decentralised policy environment leadership, at any level, is considered an established necessity for successful organisational operation and policy enactment (Flessa, 2009). In this context the distributed leadership model is considered as a best practice model, which provides depth and expertise in leadership at a range of levels (Flessa, 2009).

In a distributed leadership structure, middle leaders, particularly HOFs, occupy a particular leadership niche as direct instructional leaders. This positioning makes them unique from senior level leaders who predominantly operate in a strategic space. HOFs are instructional leaders because of their proximity to the classroom, and the direct oversight they have for curriculum programmes, and pedagogical approaches (Robinson et al., 2009). This means that their role requires both leading in a strategic sense, particularly in relation to policy reform around curriculum, and managing in a day-to-day operational sense (Robinson et al., 2009). Because the HOF role is so closely connected to classroom practice, and therefore to student outcomes in a self-managing school system like we have in New Zealand, the instructional nature of HOF leadership makes them particularly accountable for student academic outcomes (Cardno et al., 2018). This in turn, can contribute to the prioritisation of management style tasks, as opposed to strategic leadership in distributed structure (Lillejord & Borte, 2019). Lillejord and Borte (2019) identified in an international review of literature on middle leadership, that it has been questioned in literature whether a focus on management is the best use of the human resource that HOFs represent as direct instructional leaders in a distributed leadership system.

A significant facet of the role of the HOF is as a conduit between senior leadership (the strategic leadership of a school) and teachers. This positioning places HOFs at a critical juncture of policy implementation. The positioning of HOFs was a significant focus for Feist in a 2008 case study research paper. In the findings of this case study which examined the experiences of HOFs in 3 schools in New Zealand, Feist found that one of the three most significant functions of the HOF was as a conduit, and therefore a representative of others in their leadership work (Feist, 2008). Significantly, Feist concludes that this facet of the role is critical to the implementation of policy as it means that HOFs are positioned to communicate these strategic decisions to the instructional implementers in the classroom (Feist, 2008). This characterisation of HOFs as conduits in policy implementation is further supported by Shaked and Schechter's (2017) review of literature who concluded that the literature reviewed had demonstrated that HOFs were uniquely positioned to influence policy implementation because of this positioning (Shaked & Schechter, 2017).

Role ambiguity and inconsistent framing presents a challenge to HOFs in this capacity. In a review of a small number of case studies in 2013, Gurr and Drysdale concluded that the role of Middle Curriculum Leaders is "complex and ambiguous" (Gurr & Drysdale, 2013, p.57). In another review of literature, Leithwood (2016) explores this notion of ambiguity further, suggesting that internationally, there is notable variation in the expectations strategic leaders have of HOFs; particularly in terms of the extent to which they expect middle leaders to operate strategically (Leithwood, 2016). Gurr and Drysdale's (2013) characterisation of the nature of the way HOF roles are framed has been echoed in later research studies undertaken in the New Zealand context, which recognised that in our distributed leadership structures, the clarity with which the functions of curriculum leadership are delegated lack clarity (Cardno et al., 2018).

The significance of role clarity to the efficacy of HOFs in their work, specifically relating to the implementation of strategic policy, has also been the subject of investigation in literature. Brandmo et al. (2021), who sought to develop a theoretical model of effective middle leadership based on a review of literature based in Norway identified role clarity as a critical facet of the motivation of HOFs to do a ‘good job’ (Brandmo et al., 2021). The struggle for HOFs to find this motivating level of role clarity can be connected to the established breadth of expectations that are part of direct instructional leadership, and the varied conceptions of middle curriculum leadership (Leithwood, 2016). Understanding the factors which motivate HOFs to carry out their day-to-day roles effectively is an important part of building understanding of how leaders in these roles can be better supported to act effectively in strategic spaces. The importance of this was highlighted in a significant review of literature undertaken by Lipscombe et al., in 2021 which revealed that the impact of middle leaders on policy implementation is also ambiguous (Lipscombe et al., 2021). This suggests that the ambiguity of HOF role expectations, lack of role clarity, and the flow of effect of this in relation to HOF performance in strategic spaces has a tangible impact on their efficacy.

Current trends which see educational reform as largely centrally constructed can present challenges to HOFs at the implementation stage. This challenge often relates to ambiguity in centrally constructed policy as it relates to practice and can be exacerbated by other stressors arising from intensification of the role. Flessa (2009) recognised that the current educational policy environment internationally can be characterised as centralised, where policies are constructed at a state or federal level (Flessa, 2009). This characterisation directly applies to the New Zealand secondary school environment, where significant educational policy shifts are developed and constructed by governmental bodies such as the Ministry of Education (MoE) and the New Zealand Qualifications Authority (NZQA) (Cardno et al., 2018; Highfield & Rubie-Davies, 2022). This policy environment sits alongside the self-governing school system which exists in New Zealand, where individual schools, and school leaders, have a notable amount of autonomy over how this policy is implemented in context (Youngs, 2014). This coexistence of centrally mandated policy, and autonomy for school leaders exacerbates the space between intended policy and the practice of implementing it which is a significant complexity for HOFs (Flessa, 2009). Shaked and Schechter (2018) further explored this complexity, asserting that the reviewed research demonstrates that internationally this complexity results in policies rarely being implemented as written or intended (Shaked & Schechter, 2018). They attribute this flaw in reform implementation to the complexity that individual schools experience negotiating the policy implementation process, alongside other internal strategic initiatives (Shaked & Schechter, 2018).

Factors Contributing to the Complexity of HOF Leadership

There are a number of factors which literature has demonstrated are contributors to the complexity of curriculum middle leadership, intentional educational change, and the role of middle curriculum leaders in enacting change through policy implementation. This section of the literature review will unpack the factors which are most relevant to the data generated for this dissertation.

Variation in Role Construction

HOFs face a number of challenges in their work, many of which can be connected to the way their roles are constructed in a distributed leadership model. Leithwood's (2016) study categorised the different ways the role of middle curriculum leader can be framed by senior leadership either as an opportunity to build leadership and innovation within faculties with the capacity to contribute to school-wide leadership, or merely as a conduit for existing strategic initiatives (Leithwood, 2016). This characterisation has been developed in other literature, as identified in Lipscombe et al.'s (2021) review which identified that in a distributed leadership structure, HOFs straddle the responsibilities of both leadership and management (Lipscombe et al., 2021). This duality, and the extent to which individual HOFs are expected to either strategic leadership related tasks, operational and administrative management related, or both is a significant factor which contributes to the complexity of their role.

There also exists a wide range of variability within HOFs as individual school leaders and this is a factor which contributes to how reform and policy implementation is experienced in this role, and how these experiences have been presented in literature (Ledesma, 2014). This variability was highlighted in a systematic review of literature on middle leadership research undertaken by Ledesma (2014). This review identified an extensive list of characteristics and competencies within which there was significant variability in the subjects of research studies that had been undertaken (Ledesma, 2014). This included self-esteem, coping skills, self-efficacy, optimism, adaptability, attitude to risk, perseverance, and tolerance for uncertainty (Ledesma, 2014). Ledesma (2014) notes the significance of this variability by drawing attention to the influence that variation in any one of these characteristics or dispositions has the potential to have on the experience of a HOF in their role (Ledesma, 2014). This is even more significant when considered in the context of the additional pressures of policy implementation.

Delegation

The centrality of delegation to the work of HOFs is also a factor which contributes to the complexity of their role generally, and in relation to their work around educational change and policy. In a distributed leadership structure, delegation is a significant part of the work that HOFs do (Feist, 2008). HOFs are routinely delegated work to do on behalf of senior leadership whether acting in a leadership or management heavy framing of the role (Feist, 2008). Feist established that in a New Zealand context, most HOFs work within a hierarchical structure which constitutes a 'formal delegation model' (Feist, 2008). As established, the nature of the work delegated to HOFs by senior leadership is highly variable between organisations (Lillejord & Borte, 2019). A systematic review of literature undertaken by Lillejord and Borte (2019) concluded that the nature of delegation to HOF within organisations is often 'ad-hoc', making it complex for HOFs to negotiate what their role in educational change is, and what their leaders intend it be (Lillejord & Borte, 2019). A significant complexity for HOFs, is that the nature of their role as conduit in the context of policy implementation means that their work routinely involves the delegation of work to others (Feist, 2008). According to Gurr and Drysdale's (2013) review of three case studies of middle leadership experience, the nature of shared work within a faculty necessarily involves the delegation of tasks downwards because of the way that distributed middle leadership sits in a formal delegation model of working. It is argued that the positioning of HOFs as a conduit within a formal line management model of leadership gives "tacit legitimation to the practice of delegation" (Gurr & Drysdale, 2013, p.57). This positioning in relation to delegation can be beneficial in that it supports HOFs to involve teachers in the work of policy implementation but can also present micropolitical challenges which will be discussed in a later section of this literature review. Therefore, delegation remains a complex part of the work of policy implementation which is unique to the direct instructional nature of middle curriculum leadership.

Time to Act Strategically

HOFs often characterise their experiences in their roles as being overloaded or overwhelming. This claim is evidenced in a review of research into middle leadership in Norway for the purpose of constructing a theoretical model conducted by Brandmo et al. (2021). When measuring the perception of their work contexts across the review, this piece of research identified feelings of having a “heavy workload”, “hectic schooldays” and “little time for rest and recovery” were characteristic of many HOFs (Brandmo et al., 2021, p.415). Here, perceived lack of time to adequately complete all parts of the role within expectations is a significant stressor (Brandmo et al., 2021). This review clearly identifies that there is a broad trend for middle leaders that they perceive there to be a lack of time needed to complete all tasks associated with their roles (Brandmo et al., 2021). This conclusion is supported by the review of literature conducted by Shaked and Schechter (2017) which concluded that pressure on middle leaders had “increased significantly” (p.713). Its relevance to a New Zealand educational context is echoed by Cardno et al. (2018) who identify the “lack of time to perform tasks adequately” as regularly identified challenges for middle leaders in New Zealand which contributes to the role being overwhelming (p.45).

The sense of being overloaded that arises from the time pressure in the HOF role could be characterised as the absence of time to act as strategic leaders. When considering the negotiation of policy implementation in a direct instructional space, perceived lack of time to lead strategically is a significant complicating factor. This challenge is identified most consistently in existing literature about the leadership experiences of middle leaders (Brandmo et al., 2021; Gear & Sood, 2021; Leithwood, 2016). Both Leithwood (2016) and Gear and Sood (2021) identified time to consider strategic priorities as being critical to allowing HOFs to exercise leadership which supports change in their day-to-day roles. Notably, Leithwood (2016) acknowledges that this time to exercise leadership needs to be in addition to adequate time to carry out instructional duties, including the management of curriculum, contact teaching and its associated tasks. Gear and Sood (2021) also notes that specially delegated time and space influences the ability of middle leaders to promote change in their curriculum. This conclusion was supported by Brandmo et al.’s (2021) review of literature which identified that access to adequate time, or perceived lack thereof, is a stressor commonly identified in research on the experiences of curriculum middle leaders, clearly indicating that perceived lack of time in a crowded and demanding leadership role is a significant factor which contributes to the complexity of enacting educational change in this space. Of interest, this study also recognised that time pressure had the potential to be supportive of HOFs working to implement policy, wherein some time pressure contributed to self-efficacy in leadership (Brandmo et al., 2021). This indicates that time is indeed a complicating factor which has the power to contribute both positively and negatively in this context.

Micropolitics

Micropolitical tensions also present a challenge to HOFs in their work relating to the implementation of policy, and these tensions often influence how HOFs undertake that work. From a broad lens, Piot and Kelchtermans (2015) have identified that micropolitical theory is a useful way to understand the nature of schools as organisations, recognising that subcultures exist in such organisations and that this can lead to competition between the priorities and interests of different groups (Piot & Kelchtermans, 2015). This theoretical framing is relevant to middle leaders who, as established, act as conduits in a distributed leadership environment, and who therefore are often negotiating between the competing subcultures of the strategic leaders of the school, and teachers (Piot & Kelchtermans, 2015).

Accordingly, Piot and Kelchtermans (2015) argue a clear link between micropolitics and perceptions of working conditions in schools. In relation to middle curriculum leaders, different groups within schools, specifically strategic leaders and middle leaders themselves, can have very different perceptions of the most desirable working conditions in this space. This provides a strong connection which can help us to understand an additional factor which contributes to the perceived overloaded nature of the HOF role discussed in the previous section of this review. Lack of agency over their time is a working condition which contributes significantly to this conflict in school leadership hierarchies. Piot and Kelchtermans (2015) go on to discuss that the challenge faced by middle leaders in this context, is the micropolitical action they choose to take in response to such a conflict in perception (Piot & Kelchtermans, 2015). Where conflict exists between subcultures, especially relating to workload, middle curriculum leaders must decide what actions they take to safeguard or restore their desired conditions (Piot & Kelchtermans, 2015).

Flessa's (2009) critical review of literature also explored the role of micropolitics in middle leadership practice. In this review Flessa (2009) identifies that micropolitics can be both a source of conflict (as described above) but also support the achievement of consensus or cohesion. Through the flexible and targeted application of micropolitical strategies, middle curriculum leaders are also able to work productively in a direct instructional space to support change and development (Flessa, 2009). Micropolitics therefore, can be a factor which creates complexity for middle curriculum leaders, but can also be strategically applied to mitigate this and other complexities which may arise (Flessa, 2009).

Relational Trust

The significance of interpersonal skills to effective performance in a middle curriculum leadership role is a symbol of the importance of establishing relational trust to successful delivery of tasks and responsibilities in this context (Cardno et al., 2018). The nature of the distributed leadership model that is employed in most New Zealand secondary schools means that the expectation that HOFs are able to influence the teachers that work in their faculties, their teaching, and therefore the learning and student outcomes associated with this is one of the most consistent aspects of the way HOF roles are framed (Gurr & Drysdale, 2012). Relational trust is central to the ability of the HOF to exert this influence and create change in a policy environment (Fairman & Mackenzie, 2015). Indeed, Robinson's (2011) study exploring student-centred leadership noted the ability to establish relational trust as one of three key leadership capabilities. The significance of this leadership capability is reinforced in Edwards-Groves' and Grootenboer's (2021) ethnographic secondary education study which concludes that where middle leaders are supported to grow relational trust this reciprocates by building conditions for the realisation of goals, or initiative aims. A complexity is that middle leaders need to be able to support relational trust both up, to senior leaders, and down, to the teachers in their faculty, in order to work effectively (Fairman & Mackenzie, 2015; Leithwood, 2016).

Additional Demands of Policy Implementation

Reform and policy implementation are factors which add complexity to an already broad role played by HOFs by contributing significantly to the intensification of the HOF role. There are numerous stressors which arise for HOFs out of this intensification, each of which have the potential to influence the success of the policy implementation. The most significant of these is the additional workload that implementing policies represents, especially when those policies are centrally managed by the government, rather than the organisation itself. Lispcombe et al. (2021), have identified that the distributed nature of school leadership means that middle curriculum leaders are acting as conduits of policy increasingly and this is echoed in the work of Cardno et al. (2018) who see this as relevant in a New Zealand context. The demands that this part of the role places on workload has been acknowledged across a range of studies (Gear & Sood, 2021; Leithwood, 2016; Shaked & Schechter, 2019).

In addition to the additional demands that policy implementation places on the workload of HOFs, the nature of this work also presents complications. Specifically, policy implementation draws HOFs away from their subject or curriculum leader disposition which is often the strength that has most significantly contributed to their appointment to the role. Feist's (2008) case study research into three New Zealand secondary schools recognised that strength as a subject leader, and as a subject expert in the classroom was one of the most significant factors which contributed to the appointment of HOFs. However, her study also acknowledged that the strategic nature of enacting educational change through policy implementation was an increasingly prevalent part of the HOF role, and that this work required a very different skill-set subject leadership and expertise (Feist, 2008). This creates complexities for HOFs who find themselves undertaking work which requires skills that they have little experience enacting, and for some this may represent a significant challenge.

Finally, the work of policy implementation often requires HOFs to be working in uncertain and unclear spaces which adds complexity to achieving goals and meeting expectations. Shaked and Schechter (2019) recognise that the current nature of centrally organised educational reform is that it is often generally outlined. This places an additional demand on a HOF, who is required not only to negotiate the relational aspects of policy implementation but is also required to interpret and apply this in conditions which could be described as obscure (Shaked & Schechter, 2019). The creativity and innovation demanded by this is an additional demand in an already overcrowded work role.

Conclusion to Literature Review

This chapter has explored existing educational literature and research regarding intentional educational change, the role of curriculum middle leaders broadly and in relation to enacting educational change, and the factors which contribute to the complexity experienced by curriculum middle leaders in this space. This summary supports the conclusions that intentional educational change is an increasingly significant part of the educational environment, and that positionally, middle curriculum leaders are vulnerable to the impacts of this. This supports further inquiry into the experiences of HOFs in relation to initiative implementation with consideration for their capacity to deliver all parts of their broad and complex leadership role effectively.

Chapter Three: Methodology

This chapter outlines and justifies the methods and methodology which were applied to this research study. The focus is justifying the selection of the methods used, and the ways they were applied to the overall research design, supported by relevant literature. To support this, the research design, methodology, and methods are described. This is followed by an overview of the data collection and analysis processes which were undertaken, including the participant selection process. Finally, this chapter will explore ethical considerations, the validity and limitations of this study.

This research study was focused on exploring the experiences of HOFs working in initiative intensive environments. Specifically, it sought to understand the impact that work relating to initiative implementation has on HOFs day-to-day responsibilities, and the ways that they prioritise their workload in such an environment.

Research Methodology

This study is qualitative research. A qualitative paradigm was selected for this study because the research questions seek to understand the lived experience of participants and therefore is experiential in nature. Qualitative research paradigms support researchers to understand how individuals and groups behave in a social reality, and the perceptions they form of their reality (Tolich & Davidson, 2011). This supports the use of this framework for this research study, as it seeks to explore the behaviours of HOFs in the form of decisions they make about prioritising their workload, but also seeks to understand their perceptions of the environments they are working in, and how their behaviours are influenced by environmental factors. Qualitative research also supports the use of more than one method of data collection, which was beneficial to this study in that it allowed the researcher to collect data which developed understanding of the participants' experiences, as well as the perceptions they attached to them (Cohen et al., 2017).

The qualitative approach to this research study was also underpinned by an interpretivist framework. This methodological framework recognises the significant role that interpretation of lived experiences from both participants and the researcher in the findings (Clough & Nutbrown, 2012; SAGE Research Methods, 2021). Interpretivism is a framework which is underpinned by the relativist ontological view that there is not one single reality, rather that there are many realities which are constructed by the people that exist within them (Clough & Nutbrown, 2012; Sage Research Methods, 2021). Reality, in this framework, is subjective. Accordingly, this framework is grounded in the epistemology that reality requires interpretation (Sage Research Methods, 2021). Interpretivist frameworks are therefore often applied to qualitative research. This research study is positioned within the interpretivist framework because one of my main interests was in the perceptions that HOFs have about the factors which influence their decision-making in their lived reality of implementing initiatives.

Creswell and Poth (2018) have acknowledged that axiology is also a significant consideration in research as well as epistemology and ontology. This is particularly significant in research where the researcher is positioned in the context of the research study (Creswell & Poth, 2018). Accordingly, my current role as a middle curriculum leader in a New Zealand secondary school is relevant to the interpretation of the data in this study. It was important that the research design sought to mitigate the conflation of my lived experience with that expressed by the participants. This mitigation was important as my positioning had the potential to influence my interpretation of the data generated by projecting my own experiences and opinions onto the responses of participants. The dual-methods research design and data analysis approaches discussed in the next section supported this mitigation.

Overall Research Design

A sequential dual-methods research design was employed for this study which elicited qualitative data from participants via surveying and semi-structured interviews. The survey was designed to enable the collection of data related to participants' experiences of working as a HOF, the different aspects of the leadership role, the kinds of initiatives they have experienced, and the challenges they have faced. In a small-scale research process this method of data collection allowed me to reach more participants than would be possible through the single method of interviewing and the bounds of a 60-point dissertation and therefore broadened the data available for interpretation in the findings of this study. Surveying also supported the opportunity to observe patterns in data generated which will specifically support conclusions relating to the first research question in this study. The inclusion of some semi-structured interviews supported the generation of some individual narrative around the data generated in the survey (SAGE Research Methods, 2021). This narrative is significant in supporting the conclusions drawn in relation to the second research question in this study.

A sequential design was applied to the data collection in this study, whereby one set of data was collected before the next (Creswell & Plano-Clark, 2011). Specifically, the survey data was collected, followed by the collection of the interview data. This was mechanised by the distribution of the online survey to potential participants, and at the end of the survey, participants were asked if they were interested in being interviewed for the second part of the study. This was a practical decision as it minimised the need for the researcher to make contact a second time with the same pool of potential participants regarding this study. To minimise the influence that this sequential design could have on the data analysis, no identifying features were collected in the survey which could have linked the participants interviewed to their survey responses.

The initial data collection method was an online survey. This survey was distributed to a pool of 162 potential participants via email. If email recipients chose to participate in the study, they were able to follow a link from the email to complete the survey, providing their consent for participation through completion. The survey was administered via an anonymous platform and did not collect any identifying information. This survey consisted of seven questions (Appendix A) which elicited responses to support the researcher's understanding of the day-to-day elements of participants' HOF role, their experiences of initiative implementation, the tasks which they prioritised when working on initiatives, and the factors which influenced their decisions around this. At the end of the survey, participants were offered the opportunity to volunteer to be interviewed for the second stage of data collection. Participants interested in this part of the study followed a link to a separate survey which collected their contact details to support the arrangement of interviews. This preserved the anonymity of their survey responses in relation to their interviews.

This process was sequentially followed by the conducting of four semi-structured interviews. Interviews were conducted by the interviewer via online platforms such as Zoom, Teams, and Google Meet (determined by participant preference) and lasted for approximately 30 minutes. Four questions were used as discussion prompts to support some common structure across the interviews conducted (Appendix B). These questions sought to develop some narrative around the survey data by exploring the perceptions of the participants about the impact of the decisions they make around workload prioritisation and the influences on them. These interviews were audio-recorded and then transcribed to support data analysis.

A parallel analytical design was applied to the data collected in this study (Creswell & Plano-Clark, 2011). Although the data gathered via each method was considered separate throughout the analysis process, this analysis took place concurrently and the findings were triangulated to support the development of the discussion and the conclusion in this study. A parallel analytical design at this stage of the research process sought to mitigate the influence that researcher positionality would have on the interpretation of data and conclusions drawn. This is because a sequential approach to data analysis would have provided space for researcher judgement to play a role in the selection of interviewees based on the survey responses provided. This potential, yet minor, biased approach to interviewee selection would have had a negative impact on the validity of the findings in this study. Further, the parallel analysis supported the triangulation of data generated from both methods of data collection, supporting a more coherent and thorough engagement with the research questions in discussion and formation of conclusions.

Participant Selection

The first step in the sample selection process was to identify a pool of potential participants. First, a framework was placed around schools which were considered eligible for inclusion. Schools that were considered for participation have at least 1200 students. This decision was made as researcher experience suggested that schools of this size were of sufficient size that made it likely they would be using a distributed leadership structure which included HOFs. This study also limited participation to HOFs working in public secondary schools. This decision was made because public secondary schools are more likely to be working with the NCEA assessment system and therefore be more closely engaged with the New Zealand Curriculum. Engagement with these systems and policies would support me to find participants with experience appropriate for this study.

This study also narrowed the range of learning areas that were included. HOFs of learning areas of English, Mathematics, Science, and Social Sciences were considered for inclusion. These learning areas are considered ‘large’ as they generally support through their courses the biggest number of students in a school and are compulsory at Year 9 and 10. This means that they are typically the largest faculties in the school in that they cater to the biggest number of students, and courses, and consequently have the highest number of staff. Furthermore, HOFs of these learning areas tend to have broad roles in terms of staff leadership as well as curriculum leadership. Schools from a range of Equity Indexes (a measure of the socio-economic barriers faced by a school community) were included in the invitations sent to potential participants to remove potential for biases in the findings related to this (Ministry of Education, 2023b).

HOFs eligible for inclusion in the sample were identified and invited by searching for schools which meet the inclusion criteria (at least 1200 students, public) on the Education Counts website (New Zealand Government, 2023). HOFs from these schools were then selected to be invited to participate in the study on the basis of the public availability of their email addresses on publicly available school websites.

Two notable exclusions were made to this pool of potential participants to support the ethical validity of this study. Firstly, HOFs currently working at any of the schools the researcher has worked at in the past, or currently works at were excluded. Secondly, HOFs working at schools eligible for inclusion but who had previously worked with the researcher were also excluded from the study. This resulted in 11 potential participants being removed from the list, which led to 162 invitations being emailed. From this pool of potential participants, 12 participants completed the survey.

The selection of participants for the semi-structured interviews came from the same pool of potential participants as the survey. This was narrowed in that only participants who opted to complete the survey were invited to participate in the interview. As noted in the overall research design, this was a practical decision about the burden on the researcher to contact the same pool of participants more than once. Interview participants volunteered to be involved in this stage of the data collection.

A random selection process was applied to the data generated from the survey to select the data which would be analysed in this study. Prior to distributing the survey, it was determined that eight responses would be analysed to support the framing of the study within the bounds of a 60-point dissertation. These eight responses were selected by using a random number generator tool online. The eight numbers generated were linked to a line of responses in the spreadsheet of exported survey responses. The same random selection process was applied to select interview participants.

Survey Data Analysis

Analysis of survey data was conducted by the researcher and was underpinned by the intent to take a thematic approach to data analysis across both parts of this study. In the case of the survey data, this was exported from Qualtrics into a spreadsheet which organised responses by participants. My initial approach to analysing this data was to consider participant responses by question. For example, I explored all the participants' responses to question 1 at the same time. The purpose of this stage of the data analysis was to identify common features of participant responses to each question, as well as outlying responses using a coding approach. To support this, notes were made to categorically generalise the responses provided to each question and note how frequently similar responses were given (Appendix C). For example, question 3 asked participants about what initiatives they had experience implementing in their HOF role. The spreadsheet provided a list of responses, the individual initiatives from each response were then listed, and their frequency noted. Once this had been completed these responses were further categorised into organisational and national initiatives. This approach was informed by the concept of open coding which uses themes to encapsulate the meaning of stated responses from participants in a way that allows analysis to make connections between similar statements (Cohen et al., 2017). A similar process was completed for the data relating to each survey question. This allowed for the coded data from each survey question to be categorised and frequency observed in a way that would logically support the thematic analysis of that data in relation to the research questions. Further evidence of this approach is evident in Chapter Four which outlines the findings.

Once this question-by-question analysis had been completed, the data generated in the survey was considered as a whole, thematically, particularly in relation to the first research question. This research question explores the impact of initiative intensive environments on HOFs. The survey data was then grouped into two broad themes to support the analysis of this data; firstly, the nature of the HOF role and secondly; HOFs' experiences of initiative intensive environments.

Semi-Structured Interviews Data Analysis

Analysis of data generated in the semi-structured interviews was also led by a thematic approach and followed several key steps. My initial intent was to use a transcription service to transcribe the interview data generated for this study. However, I elected to transcribe the interviews myself, as the researcher to support my immersion in this data, and the data analysis process I was following. This mitigated some of the disconnection that could have occurred in terms of my engagement with the data, as this research collection process took place over some time. The transcription process took the form of listening to the interviews and recording them in typed form. Once this was complete, transcripts were checked for accuracy of phrasing including the use of punctuation to ensure the data were represented accurately and the participants' meaning was preserved, and then checked by interview participants. Re-listening to interviews while reading and amending transcripts where required supported this process.

The first step in analysing this data once the transcripts were complete was to create a one-page mind-map of key ideas in each interview. These mind-maps were created while re-listening to the interviews, on A3 paper (Appendix D). The intent of this process was to create a summary of each interview that was easy to engage with at a glance, and to begin the process of selecting and connecting key ideas which might form the basis of themes.

These mind-maps were then compared to create an initial list of common ideas which were represented across more than one interview. These common ideas and concepts were then assigned codes which were applied to a reading of the interview transcripts (Appendix E).

This primary stage of the coding process supported the connection of these common ideas to concrete pieces of interview data. During this process, some concepts were refined further through amalgamation in a secondary step to the coding process. Once this primary and secondary coding was complete, the list of codes was then grouped thematically into two broad themes: the impact of the environment, and influences on prioritisation. Finally, the themes developed across both modes of data collection were triangulated to form the key areas for analysis which structure the discussion of the findings and conclusions in Chapter Five.

Ethical Considerations

The fundamental purpose of research ethics is to protect the participant (Cohen et al., 2017). A critical step taken to consider the ethics of this research study, was the submission of this research and the methodologies applied to it to the Auckland University of Technology Ethics Committee (AUTEC) for approval. Approval was granted prior any contact was made with potential participants in the study. As part of this process, I met with an ethics advisor at the university to discuss the ethical implications of this study and the actions that could be taken to support its ethical soundness.

Ensuring that research participants are informed and obtaining consent on this basis is an important part of research ethics. Information was provided to potential participants in this study in the form of the initial contact email, and information sheet which was included with it (Appendix F1 & 2). Potential participants were given access to this information about the study prior to completing the survey. They clearly outlined that completion of the survey would indicate their consent to participate in that part of the data collection. Participation at this stage was therefore voluntary. Participation in the interviews was also voluntary- interviewees provided contact details via a separate survey and were offered the opportunity to opt out of being interviewed at any stage in that process. At the start of each interview a consent process was undertaken whereby the interviewer read a consent form to the interviewee, which was agreed to and signed on behalf before the interview commenced (Appendix F3).

Protection of participants also concerns their privacy. The privacy of participants was supported in several ways during this research study. Firstly, the survey was constructed anonymously. The survey was conducted via the Qualtrics platform, and the link to the survey was distributed to all potential participants. No part of the survey recorded any identifying data, so all collected survey responses remained anonymous. Protecting the privacy of interviewees was a more complex process. Although by volunteering and being randomly selected to be interviewed, this indicated to the researcher that the interviewee was one of the survey respondents, the collection of contact details via a separate survey did not allow for the specific survey responses to be connected to an interviewee. Although as interviewer, I was aware of the identity of the interviewees, none of the questions discussed required interviewees to disclose any identifying information about themselves or their organisations. Where this may have occurred unintentionally, that data has been excluded from analysis. The anonymity of interviewees has been protected in this manuscript through the use of generic pseudonyms in Chapters Four and Five.

Protection of the participants also considered the potential to distress or discomfort in relation to this study. Through the ethics approval process, it was determined that the potential for distress in relation to this study was relatively low. However, because the study concerned participants' reflections on their lived experiences of their HOF role, there was a limited potential that the questions could evoke an emotional response. To mitigate this, the information sheet identified this limited risk, and reminded participants that they could choose not to answer any question in the survey or the interview and could elect to withdraw from the research study at any point (Appendix F2). This was reiterated in the consent for interview process (Appendix F3).

My positionality as a curriculum middle leader in a New Zealand secondary school was also identified as having the potential to impact the ethical soundness of this research study. This was mitigated by actively excluding my current and past colleagues, as well as HOFs currently employed at schools I have worked at in the past. Conversely, this positioning was also of benefit to the study as it supported my understanding of participant contexts, experiences, and challenges which were described in the data.

When considering the ethical risks of a research study, it is also pertinent to consider the potential benefits. Participation in the study provided participants with the opportunity to reflect on their work as HOFs, particularly relating to initiatives and workload prioritisation associated with this. This reflection had the potential to provide participants with the opportunity to consider adaptations to their future practice which may benefit them personally, or professionally. In addition to this, participants contributed to a research dialogue about the work of middle curriculum leaders and the impact of initiative implementation on this role. Furthering understanding of the nature of this kind of work could benefit the middle leadership community as a whole. As part of the ethical approval of this study, it was expected that interviewees and survey respondents would be provided with a summary of findings, and access to the published dissertation. This is mechanised by the provision of a link to an open access Google Drive folder in the participant information sheet which will allow participants to access these documents (Appendix F2). This mechanism protects the anonymity of survey respondents.

Validity and Limitations

Validity is an important measure of how accurately a research study describes the experiences or phenomenon it is seeking to represent (Briggs et al., 2012). There are a range of factors which can positively impact that validity of the findings or limit it.

This study uses triangulation to support the validity of the findings and conclusions. Triangulation of two or more sources of information supports validity by allowing a researcher to explore the phenomenon which is the subject of the study from more than one perspective, and therefore more completely (Cohen, et al., 2017). In this study, triangulation is achieved through the use of two methods of data collection, a survey and semi-structured interviews, as well as by the triangulation of data from these two sources in the analysis process. This is one provision that sought to minimise the impact of research positionality, as the interview data provided a narrative to support the survey data. This meant that there was less space for me as a researcher to construct a narrative informed by my own experiences.

The potential bias of participants is also an important factor which can influence the validity of a piece of research. In this study, participants were self-selected and the data they provided was self-reported. This can impact the validity of findings if this data, and the analysis if it were to be presented from a positivist framework. However, the interpretivist framework that was favoured in guiding this study means that the findings are presented as the perceptions of participants, rather than representations of a single, shared reality. As discussed earlier in this chapter, this framing of the study supports its aim as expressed in the two research questions. The preservation of participant anonymity also sought to mitigate the presence of social desirability bias in participant responses.

Potential researcher bias is also a significant consideration in relation to the validity of a research study. Cohen et al., (2017) acknowledge that no matter how robustly a researcher seeks to remove themselves from the research, researcher bias cannot be completely removed. The recording of interviews and checking of transcripts provided some mitigation of the potential for my personal experiences to influence the data collected, as did the triangulation of interviews with self-reported data in the survey. Ultimately however, my positioning as a middle curriculum leader meant that I needed to be mindful of the way I analysed data and drew conclusions in this study. This is a potential limitation, but also a potential enabler because I work in a similar context to those interviewed.

The scale of this study also presents a limitation in terms of its generalisability. This study deals with a total of eight survey responses and four semi-structured interviews. Although the validity of the study is supported by the triangulation of this data, ultimately the sample size is not large enough to make the findings generalisable to the whole population. However, the themes elicited in the data analysis do represent commonalities in the data set which can enhance our understanding of HOF experience at some level. These themes become evident in the Findings chapter which follows.

Chapter Four: Findings

This chapter presents the results and findings of eight randomly selected responses to an anonymous survey, as well as the results and findings from four semi-structured interviews. The survey allowed participants to share their experiences relating to the implementation of initiatives in their role as HOF anonymously. It focused on unpacking what tasks and responsibilities were part of their role, their perceived importance of these tasks, and the impact that initiative implementation has had on the way that they prioritise the elements of their work. The follow-up semi-structured interviews provided a smaller number of participants (four) to give voice to the ways that this prioritisation of tasks as a result of the demands of initiative implementation impacted their work and their faculties.

In this chapter, the results and findings of the survey and the semi-structured interviews will be presented separately. The survey findings are presented by question to support the illustration of frequency of responses from the survey which will inform the discussion of findings in Chapter Five. The findings of the four semi-structured interviews have been presented individually. This is to support the preservation of the voiced experiences of each interviewee. The data generated from this part of the study has been analysed thematically (Appendix E) and the thematic trends observed in the findings will be unpacked in discussion in Chapter Five.

Survey Findings

The survey results and findings presented in this section have been organised by survey question. The findings have been presented in a way that illustrates the frequency of responses. Survey respondents were able to freely write their response to the questions in the survey. Accordingly, some survey responses have been grouped into categories based on similarity to present the findings. These categorisations will also inform the discussion of findings in Chapter Five. In this chapter, frequency of responses given is indicated by a number in parentheses at the end of each response description.

Head of Faculty Tasks and Responsibilities

This part of the survey asked respondents to list or outline the day-to-day tasks and responsibilities they have in their HOF role. In responses to this question, some respondents identified a lengthy list of tasks and responsibilities they associate with their day-to-day role, and others identified a shorter list. Respondents who provided a longer list often broke down some of the tasks and responsibilities listed below into smaller steps. The thematically summarised responses outlined in Table 4.1 (following page) included a range of more specific examples given by participants.

Table 4.1: Head of Faculty Tasks and Responsibilities Survey Responses Summary

5 or more responses	Overseeing curriculum and assessment programmes (all)
	Conflict resolution and/or managing student behaviour, including associated professional conversations (all)
	Teaching (all)
	Attending meetings (6)
	Running meetings (5)
	Staying up to date with and managing initiatives (5)
3-4 responses	Organising, supporting, and monitoring resourcing (including human resourcing) (4)
	Budgeting and compliance with school policy and deadlines (4)
	Operational organisation and administration (often linked to assessment processes) (4)
	Supporting professional growth/appraisal (3)
	Mentoring (3)
	Running/organising professional development/learning at departmental or school level (3)
	Organising school events and trips (3)
	Collaborating with other faculties (3)
	Visiting classrooms/observing (3)
2 Responses	Supporting the wellbeing of staff and students

High frequency responses included examples of overseeing curriculum and assessment such as monitoring the development of programmes of teaching and learning across subjects and year levels, as well as managing NCEA assessment processes associated with these, or organisational assessment development and processes for junior students. Examples of conflict resolution included student conflict in the classroom with peers or with teachers, and conflict between teachers. Most HOFs cited a personal teaching load of approximately 0.8 Full Time Equivalent (FTE) as well as the management of a range of types of meetings in a faculty, and attendance at organisational level meetings. Many also identified workload related to initiatives as part of the day-to-day. The mid-frequency responses focused largely on administrative tasks relating to data management, resourcing, and organisation, as well as relational responsibilities like mentoring beginning teachers or subject leaders and supporting professional growth through structured professional growth processes and informal classroom walkthroughs. Finally, the least frequent responses related to activities which supported the wellbeing of staff and students- these were general responses without specific supporting examples.

Respondents Prioritisation of Tasks and Responsibilities

This question asked respondents to rank the tasks and responsibilities as part of their day-to-day work in their HOF role from highest to lowest priority. Most respondents provided a list of the tasks and responsibilities that mirrored their responses to question one, as this survey intended. Two respondents only listed the tasks they considered to be the most important or highest priority. This has contributed to the lack of agreement about the low priority tasks and responsibilities. Responsibilities and tasks considered a ‘high priority’ were ranked in the top two by a survey respondent. Responsibilities and tasks considered a ‘low priority’ were ranked in the bottom two by a survey respondent. These are displayed in Table 4.2 on the following page.

Table 4.2: HOFs' Personal Prioritisation of Day-to-Day Tasks and Responsibilities

High Priority Tasks and Responsibilities	Curriculum development and delivery of curriculum (all)
	Teaching (3)
	Team building (2)
	Wellbeing of staff and students (1)
	Meetings- specifically those run by the HOF (1)
	Administrative tasks (1)
Mid-Priority Tasks and Responsibilities	Minor administrative tasks (all)
	Professional Development and Learning (4)
	Attending meetings (4)
	Communicating via email (4)
	Tasks that occur only once a year, rather than regularly throughout the year (3)
	Reviewing already implemented initiatives and elements of department practice against student data (2)
Low Priority Tasks and Responsibilities	Monitoring compliance with admin and procedure (3)
	Initiatives (2)
	Observation, supporting professional growth/appraisal (2)
	Monitoring resourcing (1)
	Professional Learning and Development (1)
	Collaboration across the school (1)
	Student behaviour (1)

The responses summarised in Table 4.2 have again been grouped thematic in response to coding. This table illustrates that there is some agreement about what parts of the day-to-day role are high priority, in the many examples given of tasks associated with curriculum development and delivery including the development, review, monitoring, and support of curriculum and assessment programmes. It is also evident that there are relatively high levels of agreement that minor administrative tasks such as monitoring and entering data as well as ordering and organising resources were of mid-level priority. There is relatively less agreement in tasks considered low priorities, as evident in the crossover between many responses in this category and the mid-level category.

Experience of Initiative Implementation

This question sought to establish the extent and nature of respondents' experience with initiative implementation, as well as to provide insight into how respondents defined and identified initiatives in their workload. Respondents were able to list as many initiatives as they had experience with. This data has been grouped into organisational and national initiatives. For clarity, some organisational initiatives have been grouped in Table 4.3 to best provide insight into the nature of the initiatives that HOFs are working on.

National initiatives, specifically those coordinated and mandated by the government featured in the responses of all respondents. These included:

Table 4.3: National Initiatives Experienced by HOFs

National Initiatives
NCEA Review of Achievement Standards (NCEA RAS)- All respondents
Current New Zealand Curriculum Refresh (4)
Literacy and Numeracy Co-Requisite, Pilots for this initiative, and/or schoolwide initiatives relating to this national initiative. (4)

Organisational initiatives (initiatives specific to and initiated by individual schools) dominated the responses- the majority of responses given from the total list of initiatives were organisational. Individual respondents also identified a wider range of organisational initiatives in their responses. These included examples which related to the categories outlined in Table 4.4.

Table 4.4: Organisational Initiatives Experienced by HOFs

Organisational Initiatives
Schoolwide initiatives relating to pedagogical approaches (4)
The development of initiatives by the HOF that are particular to, and implemented within their own faculty (3)
Schoolwide initiatives relating to processes such as reporting or assessment (3)
Schoolwide initiatives relating to student outcomes (2)
Schoolwide review processes (2)
Individual additional work e.g., for NZQA as a moderator (1)
Implementation of new assessment systems e.g., IGCSE (1)

Impact on Day-to-Day Role

These questions asked respondents to consider what tasks and responsibilities have been impacted by their work implementing initiatives, and to consider the ways in which they have been impacted. All respondents provided responses which were relevant to both the questions. The results and findings from these two survey questions have been combined in this chapter as some respondents conflated the questions. Their responses have been grouped in Table 4.5 over the page into thematic categories that reflect impacts felt by the HOF as an individual, and those that may be perceived and felt by others.

Table 4.5: Impacts of Initiatives on Day-to-Day Experience of HOF Role

Personal Impacts	No time for the day-to-day or all responsibilities impacted (7)
	Loss of time, specifically non-contact time (4)
	Ability to observe teaching and learning (3)
	Lack of energy or ability to give to the role (2)
	Ability to address behaviour and student concerns (2)
	Impact on student outcomes reduced (2)
	Ability to influence teaching and learning reduced (2)
	Ability to provide scheduled mentoring (1)
Relational Impacts	Ability to be present and support staff in an unstructured way (4)
	Increased delegation (3)
	Impact on student outcomes reduced (2)
	Ability to influence teaching and learning reduced (2)
	More attention given to fostering a whole team approach to work (2)
	Provision of more professional growth opportunities for staff through delegation (1)

Thematic analysis of the survey responses relating to the impacts of initiative implementation that HOFs have experienced in their roles allowed for the responses to be grouped into two main categories, personal impacts, and relational impacts. The personal impacts include examples which relate to how HOFs feel in relation to their role, and their capacity to perform effectively in their role, as well as the perceived impacts on specific tasks which contribute to these overarching feelings. The relational impacts described in survey responses relate largely to aspects of the role where HOFs interact with others and include a range of responses which demonstrate they perceive a reduction in effectiveness in supporting these relationships, for example the ability to be present and to influence.

Factors Influencing Prioritisation Decisions

This question asked respondents to consider the people and factors which influence the decisions they make about how they prioritise their tasks and responsibilities when also working towards initiatives. Respondents were able to list as many factors which influence their workload when they are implementing initiatives in response to this question. Most respondents listed between three and five influences as shown in Table 4.6.

Table 4.6: Factors Influencing HOFs' Prioritisation Decisions

Common Influences (6-7 responses)	consideration of the impact on students and student outcomes (7)
	Consideration of the impact on staff including their well-being and workload (6)
Mid-Range Influences (3-5 responses)	A triage approach according to urgency or deadline (4)
Unique/Uncommon Influences (1 or 2 responses)	Priorities of the school as expressed by senior leadership and/or in strategic plans (2)
	The support available either from within organisation, beyond the organisation, or through resourcing (time, funding, resources) (2)
	Staff feedback and expertise (2)
	Perceived readiness of the initiative (1)
	Timeframe needed vs. provided (1)

The thematic analysis which has informed Table 6 indicates that there is a high level of agreement between survey respondents about the significance of the potential of initiatives to positively impact student outcomes, as well as staff and student wellbeing as an influence on their decisions around prioritisation. It is also noteworthy that half the respondents specifically mentioned using a triaging process to make these decisions, although in the survey responses they did not unpack what informed this triaging. Most respondents offered several influences on their prioritisation in response to this question, and this is reflected in the number of different influences that were identified by only one or two respondents.

Significance of Factors Influencing Prioritisation Decisions

This question asked respondents to consider how much influence each of the factors exert over their decision-making relating to their prioritisation of tasks and responsibilities. Most respondents provided a list of influences that mirrored their responses to question 6, as this survey intended and are displayed in Table 4.7. Two respondents only listed the most influential factors. This has contributed to the lack of agreement about the least influential factors. Factors considered to be 'highly influential' were ranked in the top two by a survey respondent. Factors considered to be 'minimally influential' were ranked in the bottom two by a survey respondent.

Table 4.7: Significance of Factors Influencing HOFs' Prioritisation Decisions

Highly Influential Factors	Impact on staff workload and student experiences and outcomes (6)
	Personal capacity (1)
	Perceived readiness of the initiative (1)
	Perceived importance of the initiative (1)
Minimally Influential Factors	Triaging conclusion about lack of urgency (1)
	Staff and student feedback (1)
	Timeframe provided vs. needed (1)
	School determined priorities (1)
	Perceived lack of fitness for purpose of the initiative (1)

Table 4.7 reinforces the evidence provided in Table F that potential for positive or negative impact on staff and student experiences and outcomes is agreed by survey respondents to

be a significant influence on their prioritisation of tasks and initiatives. Beyond this, there is significantly less agreement in relation to both highly influential factors, and minimally influential factors which guide prioritisation decisions. This suggests that HOFs are working in environments where they are exposed to different demands and expectations around initiatives and their leadership of them.

Summary of Key Survey Findings

Through the thematic analysis of the data generated from the eight survey responses, five overarching themes were identified. These themes have been grouped under the two meta-themes of "Nature of the HOF role" and "HOF experience of initiatives". These themes have been identified and explained in Table 4.8.

Table 4.8: Thematic Summary of Key Survey Findings

Meta-Theme	**Theme**	**Explanation**
Nature of the HOF Role	HOF role is Broad	HOFs have a broad range of day-to-day responsibilities and tasks associated with their role, relating to teaching and learning, curriculum leadership, administrative tasks, resourcing management, and strategic leadership of initiatives.
	Significant Workload	The broad range of tasks and responsibilities that HOFs have contribute to there being a significant workload associated with this task.
HOF Experience of Initiatives	Initiatives as constant	Although a single initiative is a temporary workload, initiative implementation is a constant part of the work of HOFs.
	Initiatives are varied	Initiatives described by HOFs are a combination of organisational and national
	Initiatives require prioritisation	The varying demands of initiatives over time mean that HOFs need to prioritise other aspects of the job to make room for the demands of this work.

Semi-Structured Interview Findings

Following the completion of the survey, respondents were invited to volunteer to participate in a follow-up semi-structured interview. From the volunteers, four participants were randomly selected for these interviews. The interviews lasted approximately half an hour, and discussion in them was structured by four question prompts. These questions asked HOFs to discuss their experiences of prioritisation of tasks in response to the demands of initiative implementation.

Through the thematic analysis of the data generated from the four semi-structured interviews, eight themes were identified. These themes are outlined in a Table 4.9 as part of the summary of interview findings at the end of this section and have been grouped under the two meta-themes of "impact of environment" and "influences on prioritisation". These themes have been used to structurally organise the responses of individual interviewees which are presented in this section of this chapter.

HOF A

HOF A works in a large, urban, single-sex secondary school with a roll over 2400 students. HOF A leads a faculty of 29 staff and has three years of experience working in a HOF role. Prior to this, he had experience working in curriculum leadership as a course leader.

HOF A- Loss of Time and Agency

Loss of time underpinned most of HOF A's responses in this interview. Although they did not identify loss of time as an impact that was observed in isolation, the impacts that they did describe in some length were all driven by the lack of time to dedicate to these tasks. He often implied that loss of non-contact time in particular, was an issue.

> "Initiatives, especially those driven by the school place a significant demand on non-contact time through structured things like meetings."

HOF A identified loss of time as contributing to his inability to give time to a range of tasks relating both to his own teaching practice, and his leadership of the faculty. This included marking, planning and preparation, and mentoring of staff and course leaders.

> "...Basically I am less prepared for my own lessons, or I am innovating less in my own teaching, or being less responsive to things I notice in my teaching because I have less time and headspace to commit to making those decisions. I also notice it really significantly in the turnaround I am able to have with my marking in particular, and there is quite a high demand for that, and on time for that in my curriculum area."

HOF A- Teaching and Learning

HOF A spoke a lot about the feeling of "not being on top of what is happening in my faculty" when describing the impact of working in an initiative intensive environment. This 'feeling' was one of the main tangible signals that he identified as indicators that his leadership practice was being impacted by the work of implementing initiatives. This was connected directly to lack of time- specifically the ability to regularly engage in the teaching and learning that was occurring in classrooms.

> "... I notice… that I am seeing less of the teaching and learning that is happening in my faculty… I am much less able to do the informal popping into classrooms which I would otherwise. So I feel much less on top of what is happening in my faculty, and less able to be on top of issues or concerns which might come up relating to classroom practice."

HOF A commented that he felt that his inability to be 'on top' of this sometimes had an impact on the teaching and learning that was occurring as he was less able to anticipate and mitigate issues.

Additionally, HOF A could see that initiatives had an impact on his own teaching, and the learning of students in his own classes. This impact was also closely connected to his observations about loss of time. In this case, HOF A observed that his own teaching and associated tasks were compromised first, because this had the least potential impact on his colleagues.

> "...I am less prepared for my own lessons, or I am innovating less in my own teaching, or being less responsive to things I notice in my teaching because I have less time and headspace to commit to making those decisions. I also notice it really

> significantly in the turnaround I am able to have with my marking, and there is quite a high demand for that…”

HOF A- Personal Effect

An underlying theme in HOF A’s responses to the interview questions was the personal impact that the prioritisation of tasks in his role in an initiative intensive environment was the effect this had on him personally. HOF A often returned to comments about whether the impacts he was describing would be felt by him personally, or by his colleagues as well. He mentioned more than once that he sought to shoulder most of this impact himself, and it could be inferred that this was having a personal effect on him as an individual.

> “The first things I let go of are always the tasks associated with my own teaching load, because I think these are largely my problem and are the least likely to impact my colleagues.”

HOF A connected this clearly to the nature of initiatives as additional to, and not resulting in adaptations to ways of working or time frames around regular tasks and responsibilities. This was an impact that he saw as relevant to all teachers working on initiatives, not just HOFs.

> “Ultimately that day-to-day still has to get done, and the time frames for that aren’t extended, so really we are all just facing additional workload.”

HOF A- Relational Trust

HOF A directly identified that there was still a high level of trust between himself and members of his faculty because he worked actively to mitigate potential negative impacts on them.

> “I work quite actively to gatekeep the impact of initiative implementation from as many members of my faculty as possibly, and I think I can see some positives from that in that there is still a pretty high level of trust between myself and the people I work with.”

HOF A identified that there is some awareness from his staff that this is his way of working. He perceives that their appreciation of this contributes to positive collaboration when work relating to initiatives is undertaken or delegated within the faculty.

> “This has a flow on impact on the general attitudes of staff when they are needed to be working on initiatives- because they are being protected from the impact as much as possible we have a pretty good collaborative working tone when we are working on this stuff.”

HOF A- Accountability

Accountability was the most significant factor of influence identified by HOF A in his responses. Specifically, he identified that accountability to Senior Leadership was the strongest factor which influenced what he decided to prioritise in his role. He attributed this to the structure and nature of their working relationships in the leadership hierarchy in his school.

> “Definitely the priorities of SLT impact my prioritisation the most. In my HOF role I report to SLT directly, and we have close working relationships with our line managers. This means that the work we are doing towards school goals and priorities is very visible and monitored very closely. “

Of note, HOF A did discuss the potential of other layers of school leadership to influence his priorities through collaborative approaches to school leadership. His responses suggested that he would prefer to have the space and capacity to work in this way with more frequency, but that the ability of middle leaders to do so is often compromised by the demands of initiatives directed through Senior Leadership.

> “At times where the demand is high from SLT, it means that I am much less able to act collaboratively with other middle leaders in the school in an innovative way. What I mean is that, we work together quite well as a group of HOFs, and work with Deans well too. But when initiative demand from SLT is high, we all have less ability to support each other with school-level initiatives which we might initiate in different circumstances.”

HOF B

HOF B works in a mid-size urban, co-educational secondary school with a roll of approximately 1300 students. He leads a faculty of ten teachers and has over ten years of experience working in a HOF role across two different schools.

HOF B's responses differed notably from the others in that loss of time and agency did not feature strongly in response to any of the questions. This HOF identified that he does not give much time to initiatives which he deems are not fit for purpose or would adversely impact staff. Accordingly, he described spending significantly less time on work relating to initiatives than the other HOFs. The impact and relevance of this will be explored in the discussion of findings in Chapter Five.

HOF B- Teaching and Learning

HOF B foregrounded many of his comments in this interview by clarifying that the potential for positive impact on staff and student well-being, and teaching and learning was the main force determining whether he prioritised working towards initiatives in his faculty.

> "I always try to prioritise staff and student well-being in my role, and quality learning experiences for students, those are my top priorities. So in lots of ways that means I am sometimes not giving the priority to initiatives that I should- so I would say this happens less often for me than maybe for other HOFs who are prioritising initiatives more regularly in their jobs."

Although this set HOF B apart from other interviewees, he also acknowledged that while he wasn't necessarily feeling the impact of this decision in relation to nationally managed initiatives like the RAS and Curriculum Refresh yet, this could be a forthcoming impact.

> "It can mean for me, that I am perhaps not as advanced in preparation for things like the new curriculum or standards as I should be, or could be, or that other schools might be. So what I see more is the feeling of being unprepared for these politically driven initiatives, which I guess will begin to impact me more over time."

Ultimately, HOF B did not see that initiative implementation was having a significant impact on his ability to prioritise quality teaching and learning in his faculty, because of the nature of his approach to this work.

HOF B- Personal Effect

When directed towards considering work that the interviewee had done on initiatives, particularly the nationally managed initiatives that the interviewee had identified as the most pressing currently, HOF B expressed that this work resulted in personal feelings of frustration both about the initiatives themselves and the way they impacted his agency in his leadership role.

> “Where I do give priority to these things, what I really notice is my own sense of frustration that I am not doing what I think is important in my role, or spending my time doing the things that I think are going to make the biggest impact on students and staff and their teaching practice or learning.”

HOF B - Triaging as Process

Ultimately, HOF B described using triaging as a process to determine the amount of time given to work relating to initiatives in his own role, and in his faculty. Although this is a commonality with other interviewees, the way that HOF B approached triaging differed. For example, he triaged initiatives largely on the basis of their readiness for implementation and potential to positively impact staff, students, and their teaching and learning.

> “Because of my approach, I don’t really see it impact my practice significantly. I think I prioritise mostly what I think is most important in this role, which is the wellbeing and outcomes of students, and the wellbeing of staff and their ability to do their jobs. My focus is still firmly on student outcomes and that means that where I see initiatives are not contributing to this, I don’t give them my time if I can avoid it.”

Of note, HOF B acknowledged that this approach was possible both because of his personal experience in curriculum leadership, and the attitudes of the leadership at his school. He was aware that his significant experience in curriculum leadership, and therefore of national reforms of curriculum and assessment systems constituted unique circumstances which would not be applicable in all contexts.

> “I think this approach isn’t necessarily possible for everyone in all schools, or in all stages of their careers, but I am confident in my decision-making and that I can strike a balance of giving priority to the work that I think is the most important and

> knowing that the non-negotiables will get done. Part of this is having been through initiatives like curriculum or assessment change before."

This approach to triaging meant that HOF B was also an outlier in that he did not discuss accountability of any kind, at any length as a factor influencing his prioritisation of initiatives.

HOF B- Relational Trust

Relational trust featured strongly across HOF B's responses, as a factor which motivated his prioritisation of initiatives. He recognised directly that his approach to triaging initiatives resulted in positive levels of relational trust in his faculty and connected this to the fact that initiatives were currently having a minimal impact on staff. It can be inferred that supporting this relational trust was one motivating factor for the gatekeeping approach taken by HOF B.

> "We have strong work relationships, and trust, because I think my staff can see that I am thinking about them, and the impact of initiatives on their jobs when I make decisions about how we spend our time and energy. So there is some trust there that I am looking out for them, and that we are doing the right thing by our students."

HOF B- Student Outcomes

The potential of initiatives to positively impact student outcomes in relation to both achievement and well-being underpinned most of HOF B's responses. At the outset of the interview, he identified that this was his "top priority" in his role, and he returned to this underlying principle in his responses to all interview questions and prompts. He attributed this to supporting the development of strong relational trust in his faculty.

> "...there is some trust there that I am looking out for them, and that we are doing the right thing by our students."

Furthermore, he saw this as directly contributing to the limited influence that accountability has on his approach to this part of his role.

> “Because I am mostly choosing to minimise the impact of initiatives that I don’t personally see having a positive impact on learning and teaching in my faculty, I am not very driven by the priorities of other people.”

HOF C

HOF C works in a mid-size, urban, co-educational secondary school with a roll of approximately 1700 students. He leads a faculty of 12 teachers. He has seven years of experience in the HOF role.

HOF C- Loss of Time and Agency

Loss of time, and agency over how time was spent was at the heart of all HOF C’s responses to interview questions. This was the first comment made by the HOF in response to three out of four questions.

Initially, HOF C indicated that the first signal that the initiative implementation is impacting his work is when he finds himself with “no time to do the day-to-day.” His response went on to unpack the range of day-to-day tasks and responsibilities which he often found himself without the time to do.

This loss of time to be agentic based on his expectations about what his role should see him doing day-to-day was also presented as having the most significant impact on HOF C’s middle leadership practice. In describing himself as “initiative rich and time poor” HOF C suggested that this impact saw him make a range of changes to his leadership practice.

> “less time to support staff members in the development of their teaching and learning practice, and to complete classroom observations. Coupled with having less time to put into resource development and behaviour management.”

He attributed this to the fact that initiatives put “concrete demands” on time through the scheduling of meetings which meant that he was able to exercise less agency over his time and meant he could not prioritise other tasks even if he had wanted to.

HOF C- Disconnection

Disconnection from what is happening ‘on the ground’ in his faculty in relation to teaching and learning was the most significant symptom of loss of agency over time identified by HOF C. In his case, HOF C described this disconnection as an inability to be present, and responsive to the issues which arise from the day-to-day work of teaching and learning. He saw this as being the most tangible impact of initiative implementation on his faculty as a whole.

> “I am less present for my staff and that means that issues they experience where they might rely on my support can escalate further before I am able to deal with them. This is especially evident in terms of student behaviour.”

HOF C- Relational Trust

HOF C saw this disconnection as having the potential to negatively impact relational trust as it sometimes left his staff feeling like their work and experiences were not a priority.

> “...it can leave staff feeling a bit neglected or like they aren’t a priority and that can negatively impact relationships.”

Although several HOFs made this general observation in their responses, HOF C was the only one to directly connect this to the sense that he was not always able to meet the expectations of his team for how he would lead them, and his availability to them.

HOF C- Accountability

Accountability featured strongly in HOF C’s response to the final interview question. Similarly, to HOF A and HOF D, HOF C commented at length on the hierarchical leadership structure in his school, where a HOF reports directly to a member of the senior leadership team. He saw this as making him highly accountable to the direction set by senior leadership in relation to initiatives and identified them as the locus of origin for the initiatives he had experienced working on.

> “Ultimately I report to SLT in my role, so the initiatives they prioritise have to be given time and attention.”

Of interest, HOF C unpacked the role that SLT plays in the provision of release time, and their power to allocate how time will be used through the scheduling of meetings and working groups as another layer which added to the influence this accountability had on his prioritisation.

> "It also impacts my prioritisation because generally the initiatives they prioritise are given time- so either release time is provided to work on them, or they are given time in meetings, and I am expected to spend time on them with the faculty in PD time or meetings too. So there is a structure given to working towards them. Sometimes I might try and push back against this if I think it is really unreasonable, but it is pretty hard to do that."

It is this agency over Chronos time that allows SLT to cultivate the influence of accountability in relation to school-wide initiatives from HOF C's perspective.

HOF C- Student Outcomes

HOF C discussed the potential for initiatives to influence student outcomes less than that of most other interviewees. He acknowledged that he viewed this potential as a personally held priority when considering the relative importance of initiatives. However, he viewed his lack of agency over what initiatives were prioritised, and how much time was spent on them as a barrier to his personal priorities influencing his work.

> "I attempt to prioritise initiatives that I think will have a positive impact on students but it is not always possible."

HOF D

HOF D works in a mid-size, suburban, co-educational secondary school with a roll of approximately 1200 students. He leads a faculty of nine teachers. HOF D has 3 years' experience in the HOF role at another school and had moved to this school within the last two terms at the time of interviewing.

HOF D- Disconnection

HOF D spoke at length about a sense of disconnection from what is happening 'on the ground' in his faculty, and in this discussion inferred that an impact of initiative implementation was the loss of time to be present in these spaces. Similarly, to HOF C, HOF D identified that this feeling of disconnection is the first tangible signal that initiatives are beginning to impact his day-to-day work.

> "I notice that I am minimising aspects of my role when I start feeling like I am not on top of what is happening in my faculty. I am in classrooms less and am less present in our shared office space. This manifests as a feeling of being out of touch with the day-to-day for me."

HOF D- Teaching and Learning

This sense of disconnection has a direct relationship to tangible impacts on the quality of teaching and learning happening in the faculty from the perspective of HOF D. Notably, he saw this disconnection as escalating to slow response or intervention times for issues impacting teaching and learning, particularly conflict and student behaviour.

> "I am always aware I am less present in these spaces when issues start to bubble up that normally I would have been able to minimise with earlier intervention. This is especially the case in terms of conflict, or student behaviour concerns, or parent concerns."

HOF D saw this as being a negative impact of initiative implementation both for his faculty as a whole, and for his personal leadership practice as he considers responsiveness an important responsibility in his role.

> "Normally I pride myself on being pretty on top of what is happening and being really available to my staff to support them with little things before they become big things."

HOF D- Personal Effect

HOF D was one of the respondents who directly addressed the personal effects initiative implementation had on him. He attributed these personal effects to the fact that initiatives consistently represent additional workload for curriculum leaders and teaching staff and recognised that this impacted the ability of individuals to move beyond the immediately urgent.

> “...the impact of being time-poor hits my individual workload quite heavily. I am not sure that is totally sustainable in the long term. Because I am so time poor in this role, I really only have time ever to do the urgent, have to do things. And that means there is much less innovation in my leadership than I had anticipated before moving up into this role.”

HOF D also alluded to the potential of this workload to negatively impact work-life balance for curriculum leaders. HOF D acknowledged that his particular approach to triaging tasks and responsibilities contributed to the intrusion of this work into his personal life.

> “I am definitely seeing patterns of workload and being time poor in my role impacting my personal life and the sustainability of that remains to be seen.”

HOF D- Triaging as Process

The use of a triaging process as a decision-making strategy about allocating time to initiatives versus other tasks was also a feature of HOF D’s responses. There are some similarities in his approach to triaging to those of other HOFs, specifically that the potential impact of initiatives was a central consideration.

> “I rely really heavily on a triaging approach, I try to separate things that will only impact me, and things that will impact other people as well. So I consider things more urgent that impact student outcomes, and staff and try to give most of my in-school time to those things, then take the impact on my personal workload into my own life.”

HOF D attributed being “good at this” for supporting his ability to manage the additional workload so far.

HOF D- Accountability

Similarly, to HOF C, HOF D directly acknowledged that accountability, specifically to Senior Leadership, had the most significant influence over how he prioritises initiatives against other tasks and responsibilities.

> “We report to SLT and are accountable to the strategic plan, and school goals, and these flow into our faculty goals. While I do some triaging of their expectations,

> ultimately they drive what we spend time on because they monitor our work around this, and they provide structure to work toward these priorities."

This response alludes to the agency Senior Leadership Teams have to control how time is spent as a structural factor that contributes to their ability to exert influence through accountability.

HOF D- Student Outcomes

Finally, similarly to other respondents, HOF D asserted that the perceived potential of initiatives to positively impact student outcomes was a personal priority for him.

> "I consider things more urgent that impact student outcomes."

However, similarly to HOFs A and C, HOF D sees himself as having limited agency to work according to his personal priorities. He sees the dominance of accountability as an influence as a force which actively compromises this at times.

> "that this kind of thing impacts my practice as a middle leader, because I end up prioritising things that aren't necessarily my biggest priorities."

Summary of Key Interview Findings

Through the thematic analysis of the data generated from the four semi-structured interviews, eight themes were identified. These themes are outlined in the Table 4.9 and have been grouped under the two meta-themes of "impact of environment" and "influences on prioritisation". These themes have been used to structurally organise the responses of individual interviewees which have been presented in this section of this chapter.

Table 4.9- Thematic Summary of Key Interview Findings

Meta-Theme	**Theme**	**Definition**
Impact of Environment	Loss of Time and Agency	Loss of time in the form of on-site non-contacts, metaphorical headspace, and personal time, and agency about how this time is spent.
	Disconnection	Disconnection from colleagues within the faculty, from what is happening in the faculty, and the day-to-day operation.
	Teaching and Learning	The impact on teaching practice of the HOF and the staff within their faculty, and the flow-on effect this has on student learning.
	Personal Effect	Personally felt impacts of increased workload including the intrusion of work into personal life and burnout.
Influences on Prioritisation	Triaging as Process	Using a triaging process which considers the relative urgency of tasks and responsibilities to determine how to respond to initiatives and integrate these with other tasks and responsibilities
	Accountability	The influence of being accountable to an outside organisation, a layer of hierarchy within the school, or to a deadline in relation to a task or initiative
	Relational Trust	The desire to promote relational trust within a faculty as a factor which influences the approach to and decisions about prioritising tasks and initiatives.
	Student Outcomes	The perceived potential for an initiative to positively impact student outcomes as an influence on the prioritisation of that initiative.

Triangulated Summary of Findings

The main meta-themes which emerged from the survey and the semi-structured interviews were triangulated upon completion of separate coding of these sets of data for the purpose of identifying the connections and overlaps between them. This triangulation considered similarities between the meta-themes and themes which arose from the findings generated by each method of data collection. The outcomes of this triangulation are communicated in Figure 4.1.

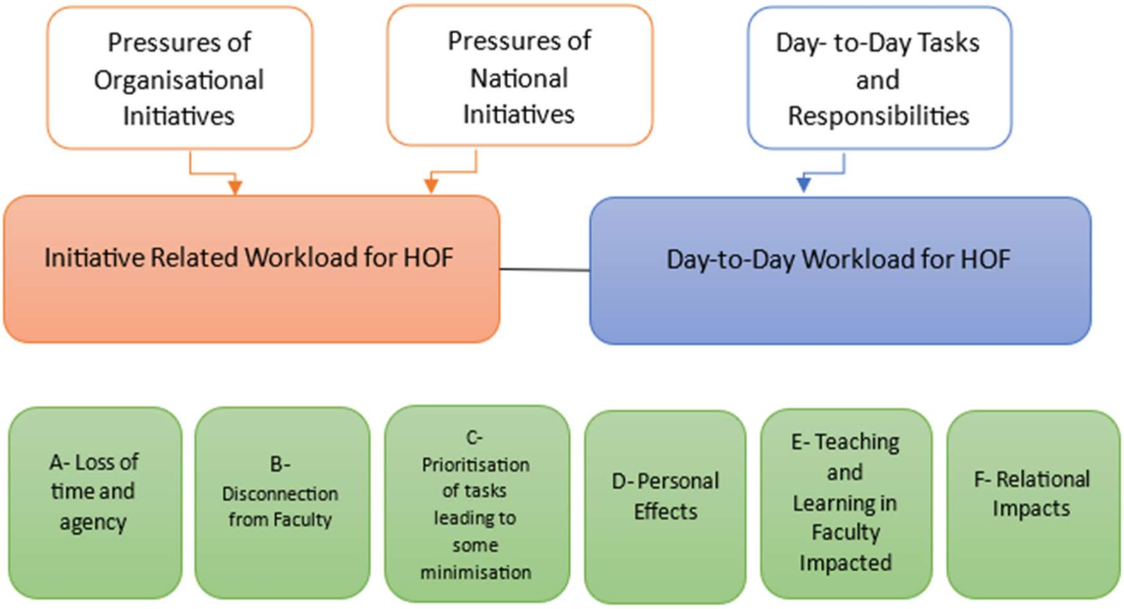

Pressures of Organisational Initiatives
Pressures of National Initiatives
Day- to-Day Tasks and Responsibilities
Initiative Related Workload for HOF
Day-to-Day Workload for HOF
A- Loss of time and agency
B- Disconnection from Faculty
C- Prioritisation of tasks leading to some minimisation
D- Personal Effects
E- Teaching and Learning in Faculty Impacted
F- Relational Impacts

Figure 4.1: Triangulation of Survey and Semi-Structured Interview Findings

Please note that A to F in the green boxes do not equate to participant A to D.

Table 4.10- Links between Impacts from Triangulated Findings and Research Questions

	A- Loss of time and agency	B- Disconnection from faculty	C- Prioritisation of tasks leading to some minimisation	D- Personal Effects	E- Teaching and Learning in Faculty Impacted	F- Relational Impact
Research Q 1: Impact of Initiatives on HOF Role	✓	✓		✓	✓	✓
Research Q 2: HOF Justification of Prioritisation	✓		✓	✓	✓	✓

The triangulated findings of this study demonstrated that workload was at the centre of HOF experiences of working on initiatives and the prioritisation which arises from this work. This can be split into two different components; workload associated with the day-to-day aspects of their role, and workload associated with initiatives. This is illustrated in the middle layer of Figure 4.1. The two sets of data indicated that there are three main inputs which contribute to this overall workload. These inputs are illustrated in the top layer of Figure 4.1. Finally, the triangulated data identified that the combination of day-to-day workload, and initiative related workload contributed to six commonly experienced impacts felt by HOFs. These are expressed in the bottom row of the diagram. This final layer brings focus to consideration of the prioritisation of workload and the impact this has on their sense of agency and efficacy in their leadership role. Finally, Table 4.10 indicated the alignment of these six impacts with the research questions that have guided this study. This indicates that there is significant overlap between the two research questions in the findings of this study.

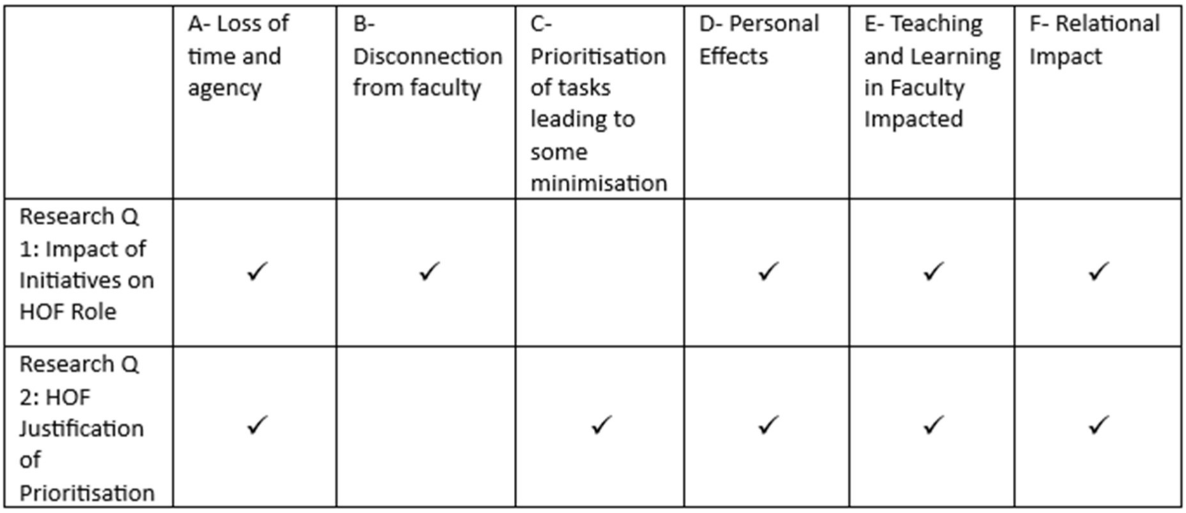
Chapter Five: Discussion

This chapter discusses the findings of the two data sets that have been presented in Chapter Four of this dissertation. The structure of this chapter is informed by the triangulation of the themes and meta-themes which emerged from an analysis of the findings of both survey and semi-structured interviews, and their relationship to the research questions as outlined in Figure 4.1 at the end of Chapter Four. The relationship between this and the structural headings in this chapter are further explained in Figure 5.1 and Table 5.1 as part of an introductory overview of the triangulated findings. The structure of this chapter is intended to move from the HOF's perception of their own role and experiences of initiatives, towards the influence of the broader educational community on these initiative-related experiences. The conclusions and recommendations offered in the following chapter will move from this broad perspective, back towards the experiences of individual HOFs.

Triangulated Findings

Table 5.1 and Figure 5.1 over the page, illustrate the relationship between the impacts from the triangulated findings, the research questions, and the structure of the discussion in this chapter. The triangulated findings demonstrated strong connections and overlap between the two research questions that have shaped this study in terms of the impacts of initiative intensity felt by HOFs in the roles and in relation to prioritisation. This overlap is illustrated in Table 10.

Table 5.1- Links between Impacts from Triangulated Findings and Research Questions



	A- Loss of time and agency	B- Disconnection from faculty	C- Prioritisation of tasks leading to some minimisation	D- Personal Effects	E- Teaching and Learning in Faculty Impacted	F- Relational Impact
Research Q 1: Impact of Initiatives on HOF Role	✓	✓		✓	✓	✓
Research Q 2: HOF Justification of Prioritisation	✓		✓	✓	✓	✓

Figure 5.1 provides an alternate visual to represent the connections and overlaps between the impacts identified in the triangulated findings and the two research questions. These triangulated findings suggest that it is important that the discussion is structured in a way that supports the relationship between the findings and the research questions to be explored concurrently. As such, the discussion of findings will be structured into the three sections identified at the bottom of Figure 5.1.

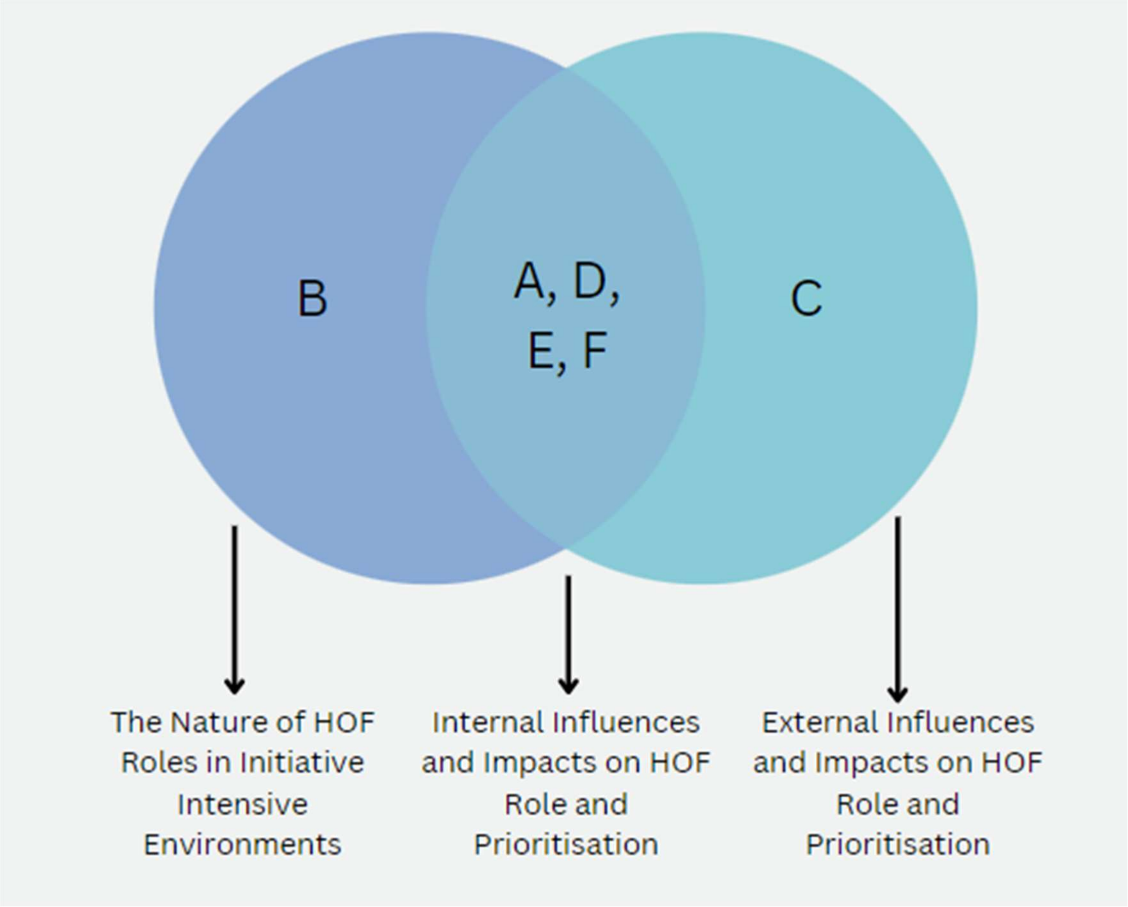

B
A, D, E, F
C
The Nature of HOF Roles in Initiative Intensive Environments
Internal Influences and Impacts on HOF Role and Prioritisation
External Influences and Impacts on HOF Role and Prioritisation

Figure 5.1 Relationship between Impacts from Triangulated Findings, Research Questions, and Discussion Structure

HOFs' Perceptions of the Impacts of Initiative Intensive Environments

As illustrated in Figures 4.1 and 5.1, and Table 5.1, the findings of this study indicate that there is significant connection and overlap between the two research questions in this study. This suggests that the impact initiatives have on the HOF role, and the justification that HOFs make for their prioritisation of tasks in this role are strongly linked, and therefore should be explored concurrently to support understanding. The discussion of findings in this chapter is structured into three sections.

The Nature of HOF Roles in Initiative Intensive Environments

The findings of the survey illustrated that the curriculum middle leadership role held by HOFs is both broad and varied. The breadth of the HOF role was illustrated by the significant number of different tasks and responsibilities that respondents identified as being parts of their day-to-day roles, as well as the categories into which these tasks fell. Specifically, respondents to the survey identified tasks that could be considered to be related to both leadership and management. Survey respondents identified a significant number of administrative tasks associated with both curriculum and assessment management, as well as organisational operations, in addition to the numerous leadership responsibilities they have which relate to the construction of teaching and learning programmes, relational tasks like staff development, and conflict resolution at a range of levels. These responses illustrate that the demands of the HOF role are multifaceted in terms of the kinds of work and leadership that is required of an individual. This characterisation of the role of HOF in New Zealand secondary schools is supported by literature based in the New Zealand context by Cardno et al. (2018) who recognised that roles of middle leaders as a whole are typically broad, large, and multifaceted. It is noteworthy that this research study also connected the breadth of middle leadership roles to the commonly described experience of these roles as overwhelming (Cardno et al., 2018).

The survey responses also indicated that there is variation within the roles of HOFs between organisations. Although there were significant commonalities in the kinds of tasks and responsibilities that HOFs identified in their survey responses, the specific examples given varied between survey respondents, and there were very few tasks and responsibilities that were identified by all survey respondents. This illustrates that the role of HOF is not standardised across New Zealand Secondary Schools, and the demands and expectations associated with this role are therefore inconsistent. The variation in framing of middle leadership roles like the one held by a HOF in a New Zealand secondary school is not limited to the New Zealand context. Shaked and Schechter's (2019) systematic review of international literature identified that the way that middle leadership roles are framed, particularly relating to how middle leaders are expected to lead (for example strategically, or instructionally) varies significantly. Accordingly, they conclude that this variation in leadership expectations for these roles contributes to the variation in HOF experience of initiative implementation (Shaked & Schechter, 2019). This illustrates the relevance of the varied construction and framing of HOF roles in New Zealand to the experiences of initiative implementation described by HOFs in this study, as well as their perceptions of its impact on their work.

The broad and varied role played by HOFs which is described in literature and illustrated in the survey responses in this study evidently has a significant workload associated with it. Survey respondents all identified a significant number of tasks and responsibilities that they considered to be part of their day-to-day workload as a HOF. These included tasks that were administrative but high frequency or consistent such as administration around assessment systems and data, as well as tasks which have the potential to require significant investments of time, particularly relational tasks such as supporting staff development and addressing classroom related concerns. What was most noteworthy about the tasks and responsibilities identified in the survey responses, were the significant number of them which necessarily needed to be completed during school opening hours in non-contact time. This is necessitated by the direct relational nature of those tasks, requiring the HOF to directly engage with students and/or teaching staff. The limits this place on when and how these tasks can be completed presents an additional pressure on HOF workload. The extent of the workload associated with the various framing of HOF roles is recognised in literature both within the New Zealand context, and beyond (Cardno et al., 2018; Shaked & Schechter, 2019). Significantly, this has been identified as a site of stress for middle leaders in reviews of literature conducted internationally (Leithwood, 2016; Shaked & Schechter, 2019).

The breadth and variation of HOF roles, and the significant workload associated with this middle leadership role is relevant to this research study because the findings of both the survey and semi-structured interviews demonstrate that it contributes to HOFs experiencing overwhelm in the context of reform and policy implementation. In the responses to surveys, HOFs identified a wide range of policy related initiatives as having been part of their workload over time. These initiatives varied in type and scale, but represented a substantial contribution to the workload that respondents associate with their HOF role. In addition to this the survey data illustrated that initiatives required HOFs to prioritise their day-to-day tasks and responsibilities in order to make room for the temporary demands of initiatives. This phenomenon was characterised by Feist (2008) in a New Zealand research study as the ‘intensification’ of the HOF role, and its associated workload.

The intensification of workload was a feature of the individual narratives collected in the semi-structured interviews. With the exception of HOF B, all other HOFs interviewed clearly conveyed an increased workload associated with the initiatives they had experienced and characterised this intensification of workload as overwhelming. In this study, the overwhelming nature of the intensification was most evident where HOFs interviewed discussed the personally felt impacts of initiative intensive environments, specifically the toll this took on their own classroom practice (HOF A and C), the increased intrusion of their work into their personal lives (HOF D), and the sense that their workload was unsustainable (HOF D). The impact of this intensification of workload on HOFs has been explored both directly and indirectly in literature that considers what conditions support effective leadership and policy implementation at this level. Brandmo et al.’s (2021) review of literature identified intensification of workload as a broadly felt stressors for HOFs, and echoed HOF D’s narrative that this is a significant contributor to the widely held feeling of a heavy workload intruding into personal time. The significance of this in terms of the ability of HOFs to lead effectively in the context of initiative implementation has been explored less directly. Discussion around this largely centres on time, or lack of time, to perform all parts of the role and it has been suggested in both small-scale studies, and literature reviews that significant leadership in this space depends on the provision of time to manage this substantial workload (Gear & Sood, 2021; Leithwood, 2016).

Ultimately, the variable nature of the way the HOF role is framed within an organisation contributes significantly both to the efficacy of the work that a HOF can do to implement reform and policy, as well as to the impact of policy implementation on the HOF (Leithwood, 2016). As discussed, a number of factors may contribute to the framing of the HOF role, including the balance between management and leadership-based tasks, the total workload, the provision of supporting resources, and the expectations of the nature of leadership to be exercised (Brandmo et al., 2021; Feist, 2008; Gear & Sood, 2021; Leithwood, 2016; Shaked & Schechter, 2019). This study demonstrates that arguments made by Leithwood (2016) and Gear and Sood (2021) that the effective leadership is predicated on supportive framing of the HOF role most significantly through the interview responses of HOF B. As an outlier, HOF B cited the least significant impacts of current national initiatives on his workload, and attributed this primarily to his experience in leadership, and the agency which he has to make decisions about his leadership in relation to these initiatives. This ultimately demonstrates that there is scope for HOFs to both be effective leadership of initiative implementation, and for this leadership to represent a manageable part of their workload.

Internal Influences and Impacts on the HOF Role and Prioritisation

This section of the discussion explores the impacts of initiative intensive environments on HOF roles and prioritisation within schools, beginning with the HOFs themselves, then moving to relational impacts at faculty, peer-to-peer and then hierarchical levels.

Personal Impacts

A significant impact identified in this study that initiative intensive environments have on HOFs' perceptions of their roles and decisions they make about prioritisation is the increased distance between their expectations of HOF leadership and the lived reality of this role. This was evident in the survey data, where HOFs identified a wide range of impacts they felt personally that initiatives had on their work. These personally felt impacts largely relate to their ability to perform parts of their role they considered to be day-to-day responsibilities and expectations either regularly, responsively, or effectively. By framing these tasks as day-to-day, and commenting on perceptions of frequency, responsiveness, and effect, this indicates that the HOFs perceived initiatives to be disrupting their core role. This inference was supported by the individual narratives provided in the surveys. In discussion, HOFs A, C, and D all identified that they lost some ability to be agentic about how they allocated their time to tasks associated with leadership roles as a result of initiatives. They often framed this discussion in terms of having 'less' time, or reduced capacity, indicating that their expectations of the leadership they should be providing was compromised. This data supports the finding from Lillejord and Borte's (2019) review of literature that middle leaders have a lack of autonomy over what form their role takes, noting a distance between what they want to do, and what they actually do. Lipscombe et al., (2021) consider the extent to which middle leaders like HOFs are working in task-oriented ways which are driven by initiatives is a systems level vulnerability which restricts the development of leadership practices at this leadership level. All HOFs interviewed for this study expressed similar sentiments by commenting on the way that tasks associated with initiatives were driving their management of workload. Furthermore, the tasks that they see as being compromised by this work often relate to leadership practices like supporting staff growth and promoting innovative teaching and learning.

A flow on impact of this distance between expectations of HOF leadership and the leadership required in relation to initiative implementation is that HOFs are drawn away from the subject or curriculum leader disposition. This was recognised by Feist (2008) in her study of middle leadership experiences in New Zealand. In this study the competition between the professional demands of leading curriculum, and the strategic demands of implementing initiatives is described as a site of tension (Feist, 2008). Similarly to Feist's (2008) study, this survey data in this study illustrated that HOFs feel that in initiative intensive environments they are being drawn away from the responsibilities in their roles that are more closely aligned with curriculum leadership, for example observing and developing teaching and learning practice in faculties and developing programmes of learning and assessment. This was further reinforced by interview responses from HOFs A, and C specifically, who identified that the prioritisation of tasks which flowed out of the additional workload from initiatives had observable impacts on teaching and learning in the faculty relating to their own classroom practice, and that of other teachers in their faculties. Notably, Feist's (2008) study also notes that proficiency and effectiveness as curriculum practitioners and leaders is often a dominant factor in appointments made to HOF roles. This helps to explain the relative comfort that many of the HOFs in this study felt in relation to day-to-day curriculum leadership tasks as compared to the more strategic work of initiatives.

Faculty Level Relational Impacts

This study also identified a number of relational impacts which HOFs perceived as arising from the additional pressure initiatives represented in their work. A significant relational pressure felt by HOFs in the survey was how they balanced their lack of agency over the demands of an initiative, and the instructional leadership needs that support their faculty, and positive relationships within it. As discussed in Chapter Two, HOFs occupy a unique position in a distributed leadership model which requires them to be direct instructional leaders, as well as to contribute to the strategic leadership of a school primarily through their work on initiative implementation (Robinson et al., 2009). In the context of this study, it is relevant that HOFs in New Zealand secondary schools occupy a largely instructional position, but that initiatives, especially national ones, require them to act strategically in this space (Gear & Sood, 2021). This tension is explored in Gear and Sood's (2021) autoethnographic study which considered the experience of acting strategically from the 'dancefloor' of instructional positioning. This study concluded that acting strategically in this space is challenging, in large part because there is a need to be flexible about how that strategic leadership is exercised due to the responsibility of the HOF to connect a strategic initiative to the wholly instructional work of teachers while preserving positive relationships to support this (Gear & Sood, 2021). This conclusion is strongly echoed in the findings of this study. HOFs A, B, and C all described the preservation of relational trust at a faculty level as a consideration in their approach to managing initiative related workload, and the leadership practices they applied to it. From these responses, it is evident that these HOFs were aware that initiative related workload has the potential to negatively influence relational trust at this level, but this risk could be mitigated by mindful leadership decisions.

Consideration of the impact of an initiative on staff and students was another relational pressure that HOFs in this study felt at a faculty level. In survey responses, the most common factor that respondents identified as highly influential on their prioritisation of tasks was the potential for an initiative to impact staff and students. This illustrates that respondents consider their instructional leadership responsibilities of particular importance. Interview data echoed this sentiment, where HOFs A and B directly discussed the fact that they felt it necessary to 'gatekeep' the negative impacts of initiative related workload from their teaching staff. Although HOF B felt more able to do this because of the framing of his role, this was a concern that directly influenced their practice in initiative intensive environments. In addition to this, HOFs A and C also expressed awareness that their own disconnection which they perceived as results from increased workload could also contribute to teaching staff feeling neglected, in turn contributing to the loss of relational trust. In these cases, taking a gatekeeping approach where possible was seen as a way for them to support relational trust, and to demonstrate that they are still effectively performing their responsibility to represent the needs of the faculty in their role as a conduit between faculty and senior leadership (Feist, 2008).

Peer-Peer Relational Impacts

In distributed leadership structures, HOFs are often framed as part of a curriculum leadership team. This framing was commonly alluded to in this study in survey responses which identified regular meetings of this team as a task related to the day-to-day work of a HOF. Shaked and Schechter's (2019) literature review identified that the connections which are formed in such a team, and the opportunity to work collaboratively in this space are key factors which enable middle leaders in schools to perform effectively in their roles. This suggests that functioning as a team and having the capacity to engage with each other as peers has the potential to support effective implementation of initiative across a school, rather than in isolation in individual faculties. This study has indicated that HOFs perceive these peer-peer working relationships as suffering in the face of initiative intensity. Although the survey responses identified that participation in meetings associated with being part of a team of curriculum leaders was not largely impacted by initiatives, in interviews, HOFs attributed this to their lack of agency over how time was used in relation to meetings in schools. Specifically, HOF A discussed that the way he engaged with this team changed when placed under pressure by initiatives. He felt that this workload, particularly in relation to national initiatives meant he was unable to collaborate with his peers on leadership activities and practices which he perceived as having the potential to influence teaching and learning more positively in his school. The relational impacts felt by HOFs in this study at this level are a further example of distance being created between HOF expectations of their role, and their personal leadership priorities, and the demands of the work they find themselves prioritising.

HOFs as Conduits

HOFs also experience relational tensions with Senior Leadership in initiative intensive environments. These relation tensions predominantly arise from the challenges of being positioned as a conduit between strategic senior leadership and teaching and learning in the classroom. Literature relating to small-scale, New Zealand based studies, and international systematic literature reviews have established that HOFs occupy this space as conduits, where they are expected to broker the implementation of initiatives at a classroom level

(Feist, 2008; Lipscombe et al., 2021). However, this positioning can be a site of tension for middle leaders as a result of the micropolitical forces which are at play in the relationships between HOFs and the senior leaders they directly report to. The key tensions which emerge in this relational space relate closely to the attitudes of senior leaders to the role played by HOFs in initiative implementation and the leadership associated with it (Gurr & Drysdale, 2013). Discussion of this attitudinal tension in literature has identified that the level of autonomy that middle leaders are encouraged to have is a key part of this attitude to leadership (Brandmo et al., 2021; Gear & Sood, 2021; Leithwood, 2016). It has been suggested that to best support the unique positional capacity of HOFs to positively influence initiative implementation, adequate levels of strategic autonomy must be supported by the distributed leadership structures in schools (Flessa, 2009; Gear & Sood, 2021; Leithwood, 2016).

This study has demonstrated that these micropolitical tensions relating to autonomy over strategic leadership practice are significant because they often influence the way that HOFs undertake the work of initiative implementation and govern the impact that this work has on their performance in the other parts of their role. In this study, HOFs identified that the attitude of the senior leaders they are supported by had the potential to be a significant influence on their experience of initiative implementation in relation to the rest of the role, by identifying that a triaging approach to managing workload in this space was a common feature of practice. Although the survey data identified a range of factors which contributed to the triaging decisions HOFs make about managing their workload, in the interviews conducted, the influence exerted by senior leadership was the dominant focus of discussion. This suggests that their influence is perceived by HOFs to be most significant. Furthermore, in interviews, HOFs specifically focused their discussion over the relative levels of agency they perceived themselves as having over how they allocated time to their tasks and responsibilities. The contrast between HOF B, who described having significant levels of agency over how much, when and in what ways he chose to engage with significant national initiatives, and HOFs A, C, and D is noteworthy. HOFs A, C, and D all described at some length in interviews having a lack of agency over how they spent their contact and non-contact time in school relating to their workload. Particularly, they noted that the senior leaders they reported exercised significantly more agency by controlling expectations around meetings, and the provision of additional release time to support work relating to initiatives which they perceived to be a priority. Although it can only be inferred that this is having an impact on the amount of time HOFs have left to be agentic in relation to, it was clear from the way the HOFs discussed the influence of senior leadership, that their perception was there is an underlying expectation that what agency they do have was used to mirror the priorities of senior leadership in relation to initiatives. This contrasting data illustrates how the practices of senior leadership have the potential to both positively and negatively impact the perceived experiences of HOFs in initiative intensive environments, as well as the leadership practices they apply to this work.

External Influences and Impacts on the HOF Role and Prioritisation

This section of the discussion explores the external influences on HOFs' experiences of initiative intensive environments, and the associated impacts on prioritisation which are perceived by HOFs in this study. HOFs are particularly challenged by the way that the current trend towards centrally constructed policy sits alongside the school-level accountability for the outcomes of policy implementation. This not only contributes to the fact that HOFs are in a highly influential position in terms of policy implementation, but they are also in a highly vulnerable position in relation to accountability for its success.

Accountability

Increasingly, schools around the world find themselves operating within what can be described as an accountability-based framework. This conclusion is supported by international literature and is demonstrated in a range of literature reviews relating to the roles and experiences of middle leaders (Brandmo et al., 2021; Lipscombe et al., 2021; Shaked & Schechter. 2017). Within such a framework, regardless of the level of apparent autonomy that schools have over their own organisational governance, they are ultimately accountable to higher governing bodies for student outcomes (Brandmo et al., 2021; Lipscombe et al., 2021; Shaked & Schechter, 2017). This accountability framework exists within an international trend towards increasingly high expectations for the outcomes of all students and on schools to deliver them (Shaked & Schechter, 2017). In this context, many school systems are putting increasing pressure on continual improvement in schools in relation to achievement targets over time (Brandmo et al., 2021). In New Zealand, this accountability trend sits within a self-governing school system, where schools have high levels of autonomy over their own organisational governance. However, within this structure, they remain highly accountable to the Ministry of Education in relation to student achievement outcomes. This context is significant in relation to this study, because it is a potential driver for the attitudes and pressures on HOFs that appear to HOFs to originate at senior leadership level. Because of the direct instructional nature of the HOF role, this layer of accountability as an organisation is not a directly visible part of their work. However, it is likely to influence the prioritisation of particularly national initiatives by senior leaders, contributing to some of the micropolitical tensions felt by HOFs in this space.

Centrally Constructed Policy

School-level accountability for student outcomes, and the outcomes of policy implementation exists concurrently with a trend towards centrally constructed and managed educational policy internationally. An international review of literature identifies increasing levels of demand relating to expected outcomes, and volume of externally driven reforms (Shaked & Schechter, 2019). This condition is mirrored in a New Zealand context, where over time reforms driven by the Ministry of Education have been numerous, significant in scope, and have high expectations in terms of implementation timeframes (Cardno et al., 2018; Feist, 2008; Flessa, 2009; Ministry of Education, 2023a). This particular policy environment, where national initiatives are constant and evolving features of the educational landscape is a significant influence on the ways that HOFs experience their roles. In this study, all participants identified significant pieces of national educational reform in the form of the Curriculum Refresh, and the RASs as substantial contributors to their initiative related workload. The national level construction of these reforms contributes to the experiences described in this study particularly around lack of agency. Although in interviews three HOFs attributed their perceived lack of agency over workload prioritisation in relation to these initiatives, it is evident that their organisations as a whole also lack agency over the time frames provided for implementation. It is evident that pressures exist externally to the organisation which place limits on this agency as well, and therefore contribute to some of the micropolitical tensions described in this study as well.

Furthermore, the national-level construction of policy initiatives also contributes to the obscure nature of the policy that HOFs are working to implement which is another source of tension identified in this study. Shaked and Schechter's (2017) study of middle leaders implementing policy suggests that educational policy at this level is rarely implemented as intended by those who have constructed this, and that this results from the tensions between central and school governments in this space. This idea was developed further in their 2019 review which characterises much of the nationally constructed reform as generally outlined and ambiguous (Shaked & Schechter, 2019). These characterisations of centralised initiative as ambiguous is applicable to the New Zealand secondary school context, as schools, and therefore HOFs are persistently working with draft curriculum, and Achievement Standards for initiatives which have tight implementation dates. The impact of this was evident in the responses to this study where survey respondents commented on the perceived fitness for purpose of initiatives as a factor which contributed to their triaging decision. This way this was framed by multiple survey respondents implied that they had experience working with initiatives that they deemed were not yet fit for purpose. This inference was supported by the data generated in HOF B's interview. HOF B frequently cited examples of national initiatives that he perceived as being currently not fit for purpose and connected this to the ambiguity of the initiative related supports provided by the central government. In this case, we can see that the obscure nature of policy influenced HOF B's engagement with that initiative. Furthermore, his experience-based assertion that rushing into work on insufficiently clarified initiatives was not necessary suggests that ambiguity in this kind of policy has been a persistent problem over time.

It is noteworthy that many middle leaders experiencing this policy environment, including two who were interviewed for this study, are near to the beginning of their school leadership careers (Brandmo et al., 2021). This study suggested that the length of experience HOFs had, and therefore the number of exposures they had to national level policy initiatives like curriculum reforms impacted the extent to which they felt agentic and impacted in their roles by initiative intensity. This is particularly evident in contrast between the experiences described by HOF B, to those experienced by HOFs A, C, and D. HOF B's characterisation of his experiences reflected his perception that he had a significant amount more agency to approach nationally mandated initiatives in a way that he considered best practice than the other HOFs interviewed. Not only does this correspond to his relatively more substantial experience in curriculum leadership roles, but he directly connected his previous experience of curriculum reform with his comfortability in committing less time and energy to national initiatives currently.

A final external influence which this study has demonstrated as having a tangible impact on HOF experience of initiative intensity is the amount of nationally constructed initiatives which are being developed and implemented by schools concurrently. The volume of intentional educational change in New Zealand education is substantial. This is evident in the 16 work programme reviews and initiatives that the Ministry of Education lists as currently active across the education sector in New Zealand on their website (Ministry of Education, 2023a). This includes a substantial review of the Tomorrow’s Schools reform to the school system, a full Curriculum Refresh, and the RASs (Ministry of Education, 2023a). These sit alongside a list of more localised initiatives, and a set of longer term strategies and policies against which New Zealand education providers are accountable to be engaged with (Ministry of Education, 2023a). Although not all of these initiatives, reviews, strategies and policies are applicable in the secondary sector, the lived reality for secondary education in New Zealand is that schools are working on implementing a significant volume of policy changes concurrently, in addition to any initiatives they may be implementing at an organisational level. This rate and volume of change presents a challenge to strategic leaders in schools, and necessarily contributes to increased workload at all leadership levels. This study clearly reflected that the volume of change is felt by HOFs at a middle leadership level, which can be attributed to their direct instructional positioning and therefore their significance in translating policy to practice.

Chapter Six- Conclusions

This chapter presents the conclusions which have emerged from the findings and discussion in this study. The discussion in Chapter Five illustrated that there is a significant amount of overlap between the two research questions which shaped this study. In response to this, the conclusions presented in this chapter are a response to how well the aim of the research, which was outlined in Chapter One, has been achieved. The chapter will first present these conclusions in the form of a response to the aim and will then address the limitations of the study. Finally, recommendations will be provided relating to the different layers of impact and influence which structured the discussion in Chapter Five.

Response to Research Study Aim

The aim of this research study, as outlined in Chapter One, was to explore how HOFs in New Zealand secondary schools experience initiative implementation in their middle curriculum leadership roles, specifically the impacts that this work has on the other elements of their roles, and the ways that they feel able to, and do exercise their leadership practice. The discussion that has preceded this chapter reflects alignment between existing literature about the roles and experiences of middle curriculum leaders, and the findings of this study, in relation to initiative implementation. The relevance of this discussion to the research aim is summarised in two sections, the first concerning HOFs experiences of initiative implementation, and the second exploring the impact of this work on other elements of their roles and their leadership practice.

How HOFs Experience Initiative Implementation

Ultimately, the findings of this study demonstrated that HOFs perceive that working in an initiative intensive environment does impact their experience of their middle curriculum leadership roles. This perceived impact broadly relates to their workload, which literature suggests is already substantial at a day-to-day level (Brandmo et al., 2021; Leithwood, 2016). In the context of this study, HOFs' perceptions were that initiative intensity introduced additional workload to their roles which directly resulted in a sense of being overloaded.

This sense of being overloaded was illustrated in this study through survey both and interview findings which indicated that HOFs were able to identify specific aspects of their role which were impacted by the additional workload relating to initiatives. A specific action which the respondents to the survey, and interviewees identified was making decisions about what tasks and responsibilities minimised, compromised or neglected, which they considered to be part of their day-to-day HOF role. This is an observable impact of initiative intensive environments for HOFs which was illustrated in the self-reported data generated by this study. In addition to this, a significant finding of this study was that HOFs associate both the need to and ways they make these decisions with a loss of agency over time in their roles. This perception that both time, and agency over it are compromised by initiatives. Interview findings from this study support the conclusion that both the perceived need to compromise or neglect parts of the role, and the loss of agency over decisions about this contribute to a sense of reduced efficacy as direct instructional leaders. It is evident that the sense of being overloaded is a central part of HOFs' experience of initiative intensity that they connect to a number of tangible impacts.

The discussion of findings also indicated that HOFs are highly aware of the impact that initiative intensity is having on their leadership practice in their roles. This study generated data which explored a range of concerns that HOFs have about how their leadership was performed, and these were predominantly relational. Although HOFs consistently expressed that there were clear personal impacts they could account for, it was the relational impacts within their faculty, with their peers, and with the senior leaders they report to which they felt were most significant and therefore spend the most time seeking to mitigate. This awareness of the impact of initiative intensity is significant to the study because it begins to reveal the underlying priorities of HOFs and shapes the responses to the experience of being overloaded in this context.

This study, therefore, has illustrated that it is HOF perception that their experience of initiative implementation is shaped largely by the intensification of workload that occurs as a result of it. This intensification of workload contributes to a sense that their middle leadership role is overloaded, which in turn influences their sense of efficacy in their roles. It is this overarching experience which shapes their responses to initiative implementation in relation to role-related tasks and leadership practice which will be discussed in the next section.

Impacts of Initiative Implementation on Other Aspects of HOF Role and Leadership Practice

This study illustrated that prioritisation of day-to-day tasks and responsibilities is perceived to be a consistent experience of HOFs working in initiative intensive environments and therefore is an important impact of initiative implementation on the HOF role. This was particularly evident in survey data, where all respondents provided a list of several tasks and responsibilities that they had compromised in order to prioritise initiative related workload. This supports the characterisation of HOFs as having limited agency over the shape of their role and workload which is established in Lillejord and Borte's (2019) literature review.

The findings of this research study also suggest that there are a range of factors which influence how HOFs make these decisions about prioritising their workload in this policy environment, a key part of their leadership practice. These factors can be categorised as personal (their own perceptions about what is important, what can have the most positive impact, and the fitness for purpose of initiatives) relational (the desire to protect and promote relational trust within the faculties or with peers, and the micro-political influence of the hierarchical distributed leadership structure they work in), and external (the influence of governmental priorities, policies, and systems). It is noteworthy that this study did allow for the inference that external forces of influence were at play in relation to the decisions that HOFs made about prioritisation, but that this was not acknowledged directly by participants in the findings. These inferences were supported by statements made by interviewees that indicated that senior leadership prioritised national initiatives by providing support and structures for this work within the organisation in the form of meetings, release time, and other mechanisms. By connecting these comments, the accountability that HOFs expressed they had to senior leadership, and the literature supported conclusions about external drivers of initiatives the inference can be made that external drivers are likely to be influencing senior leadership decision-making, and therefore indirectly influencing HOF prioritisation in this study.

The extent to which individual HOFs are influenced by each of these factors also depends on a range of variables according to the findings of this study. This illustrates that although there are common impacts of initiative intensity on HOF roles, the responses to these impacts through leadership practice can differ. Specifically, HOFs that were relatively more experienced demonstrated greater reliance on personal and relational influences when justifying the prioritisation of their workload. In the case of this study, this also corresponded with a more concrete understanding of the framing of the HOF role in context, and a greater sense of relational support for HOF agency from strategic leaders. Where HOFs are relatively less experienced in leadership roles, have less clarity about the framing of their role in relation to initiative implementation, and worked in organisations that were perceived to encourage limited agency in relation to initiatives, HOFs were much more likely to be driven by the relational influence of their hierarchical superiors, and by extension, by external priorities.

Overall, this study has illustrated that a significant proportion of HOFs perceive their agency around prioritisation of tasks and responsibilities as being negatively impacted in that they felt less able to prioritise their workload in line with personally held beliefs about the potential impact of initiatives and leadership practice in their role.

Recommendations

The discussion of findings in Chapter Five and conclusions presented in this chapter have informed the following recommendations for future practice and further understanding of this topic. These recommendations have been structured according to the levels of influence and impact that shaped the discussion of findings.

External

The rate and volume of intentional educational change that is controlled by the government in New Zealand education presents a significant challenge to schools as organisation, strategic leadership, and middle leadership. These reviews, initiative, strategies, and policies all contribute significant workload to school leaders and teachers. Reducing the rate and volume of intentional educational change in this form at a national level is likely to support schools to interpret and implement policy initiatives more effectively and allow for greater focus on the most urgent and positively influential policy initiatives in terms of student outcomes. This recommendation is supported by Robinson’s (2018) argument that the rate and volume of educational change should be decreased in order to support more effective implementation resulting in high levels of actual, and positive change.

Senior Leadership

This study indicated that the perception of HOFs is that senior leadership, in their hierarchical position in distributed leadership structures, exert the most influence over HOF experiences of initiative because of their relatively greater level of agency over prioritisation of workload. Therefore, this indicates that open-to-learning and non-defensive relationships between senior leadership and HOFs is likely to support HOFs to be more effective conduits in their work relating to initiatives, leading to more effective implementation. The fostering of these relationships in a way that is mindful of the pressures of middle leadership should be a priority for senior leaders.

In addition to this, both literature and the findings of this study support the recommendation that senior leadership should support HOFs to exercise agency over their leadership practice in relation to initiatives, and their workload as a whole (Shaked & Schechter, 2019). This support of this agency will allow HOFs to maximise their potential to positively influence initiative implementation where it is balanced with reasonable accountability measures. However, there are limits to what agency alone can support HOFs to achieve. This study has specifically identified that the intensification of workload has a significant impact on the HOF role in this context.

In order to effectively apply agency about how HOFs approach this additional workload space will also have to be created in the role for the additional work to take place. A range of approaches could be taken to the creation of this space including the provision of additional non-contact time, additional administrative support to lessen the burden of this part of the role, and structures to support the delegation of workload where appropriate. This is a complex recommendation because of the financial cost associated with these measures which is not attainable for all schools, as well as the potential for such measures to place other individuals in the school at overload in terms of their workload and capacity.

Peer-Peer

This study identified that HOFs in New Zealand secondary schools are typically framed in a curriculum team with their peers, but their perception of their leadership practice is that it is largely individualised and performed in isolation. This inference is supported by the findings of this study where HOFs identified mechanical aspects of being part of a team like attending meetings, but only one interviewee directly acknowledged this team environment and in doing so indicated his perceived inability to engage in peer-to-peer collaboration as he wished he could, due to his workload. This study, therefore, recommends that HOFs actively seek to support collaborative ways of working in relation to initiative implementation. This could be supported by the creation of collaborative leadership inquiries across a curriculum leadership team, the creation of expert groups to work on policy initiatives, or structures that support HOFs to lead meetings relating to policy initiatives rather than only being attendees. Although this is likely to necessitate the investment of some time, in what is perceived to be a time-poor environment, this investment will support HOFs to work more effectively in relation to initiatives by reducing interpretive workload, as well as providing relational support for leadership decision-making around prioritisation. This in turn, may influence the sense of agency that HOFs perceive they have in relation to initiative related workload.

Personal

At a personal level, this study suggests that HOFs can also adapt their leadership practice and ways of working to mitigate some of the negative impacts this study suggests they perceive to be resulting from initiative related workload.

Firstly, this study recommends that HOFs prioritise clear communication in their hierarchical relationships with senior leaders about the prioritisation that they are enacting in their leadership practice in relation to initiatives. The findings of this study did not indicate that direct conversations are taking place between senior leaders and HOFs about the fact that prioritisation is occurring, nor how it is being justified. This means that HOFs are acting on inference and assumption, and according to the findings of this study are in many cases shouldering the burden of additional workload individually. Clear and direct communication with senior leaders, therefore, has the potential to contribute to the provision of structural support that could mitigate some of the negative impacts of additional workload which were illustrated in the findings of this study.

Finally, this study illustrated that the prioritisation of relational trust, specifically within faculties contributed to HOFs being avoidant of using delegation strategies in relation to initiative-based workload. Although literature indicates that their role is typically framed as conduit of policy, in this study, many participants sought to gatekeep their staff from the impact of policy by undertaking workload independently. Although challenging to execute, when done so effectively, delegation strategies can support effective initiative implementation within faculties as well as the management of personal workload.

Limitations

There are several limitations of this research study which influence the application and generalisations which can be drawn from the conclusions presented. This is an interpretive study which has generated self-reported data about the lived experiences of participants. Therefore, this study has only collected the perceptions of HOFs themselves, about the ways that their roles are impacted by initiative implementation. This means that conclusions drawn about the influence of external factors on prioritisation leaned more strongly on inferences into the findings and literature, rather than direct reporting in the findings. This study could therefore be strengthened, by exploring the perceptions of senior leaders on this topic, as they have greater proximity to external influences and are more likely to be able to directly comment on their relevance.

Significantly, this is also a small-scale study that has been conducted within the bounds of a 60-point dissertation. This has limited the number of participants included to eight survey participants and four interviewees. Although a dual-methods approach supported a slightly wider reach in terms of data collection, the scale of this study means that although the conclusions presented in this chapter are supported by themes in the findings and literature, they are not generalisable. Finally, this study was conducted in the context of New Zealand secondary schools. The findings and conclusions are therefore not directly applicable to other education sectors in New Zealand, or to education systems beyond New Zealand.

Summary of Conclusions

This study has illustrated that New Zealand secondary schools are at a tipping point in terms of the volume and rate of intentional educational change that is currently being developed and implemented, and the impact that this is having on HOFs who are central to the translation of policy to classroom practice. The conclusions and recommendations presented suggest that both structural and attitudinal adjustments are needed at national and organisational levels to support HOFs to be effective translators of policy and to promote real, positive educational change through these initiatives.

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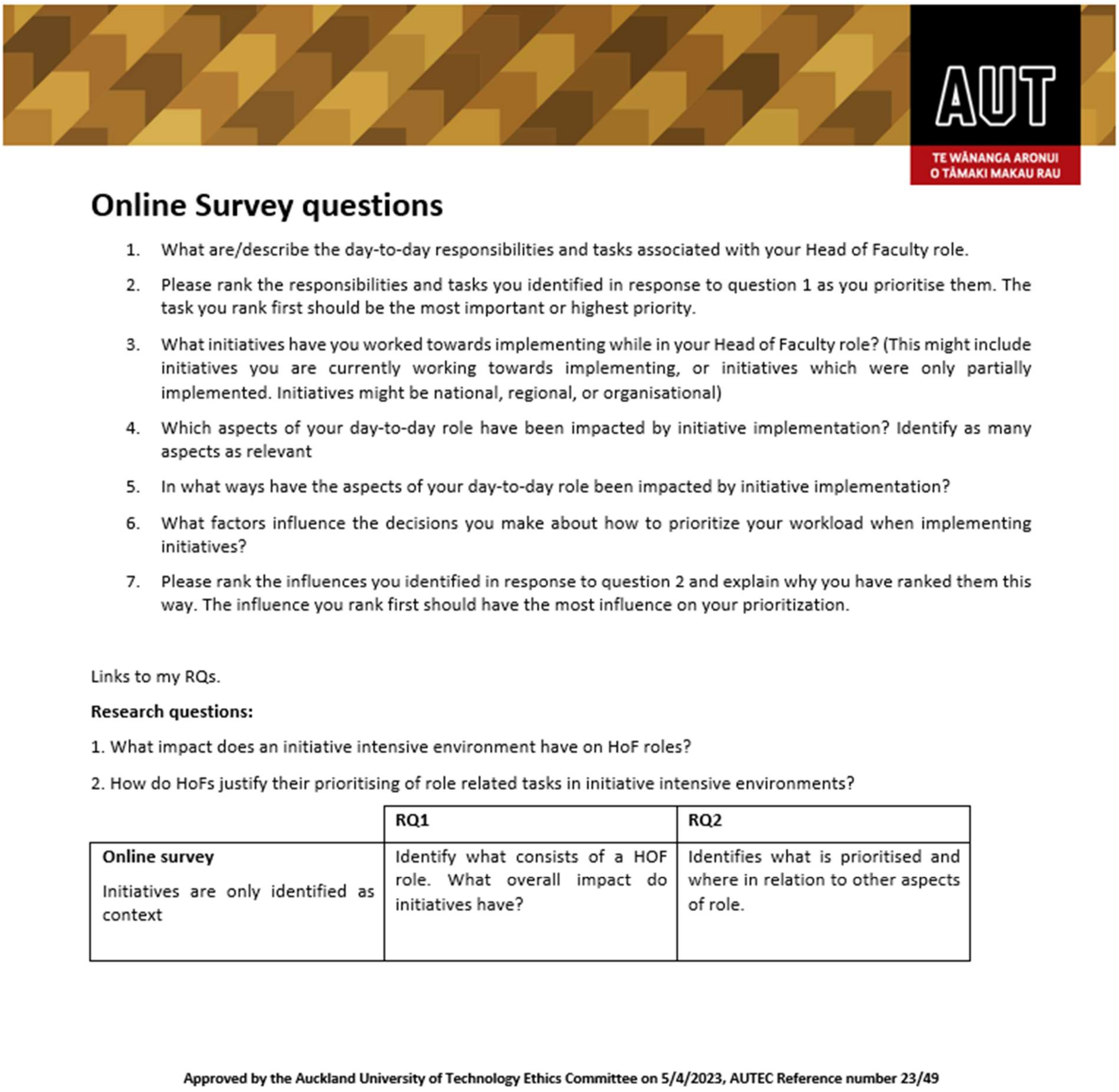
Appendix A- Online Survey Questions



AUT
TE WĀNANGA ARONUI
O TĀMAKI MAKAU RAU

Online Survey questions

1. What are/describe the day-to-day responsibilities and tasks associated with your Head of Faculty role.
2. Please rank the responsibilities and tasks you identified in response to question 1 as you prioritise them. The task you rank first should be the most important or highest priority.
3. What initiatives have you worked towards implementing while in your Head of Faculty role? (This might include initiatives you are currently working towards implementing, or initiatives which were only partially implemented. Initiatives might be national, regional, or organisational)
4. Which aspects of your day-to-day role have been impacted by initiative implementation? Identify as many aspects as relevant
5. In what ways have the aspects of your day-to-day role been impacted by initiative implementation?
6. What factors influence the decisions you make about how to prioritize your workload when implementing initiatives?
7. Please rank the influences you identified in response to question 2 and explain why you have ranked them this way. The influence you rank first should have the most influence on your prioritization.

Links to my RQs.

Research questions:

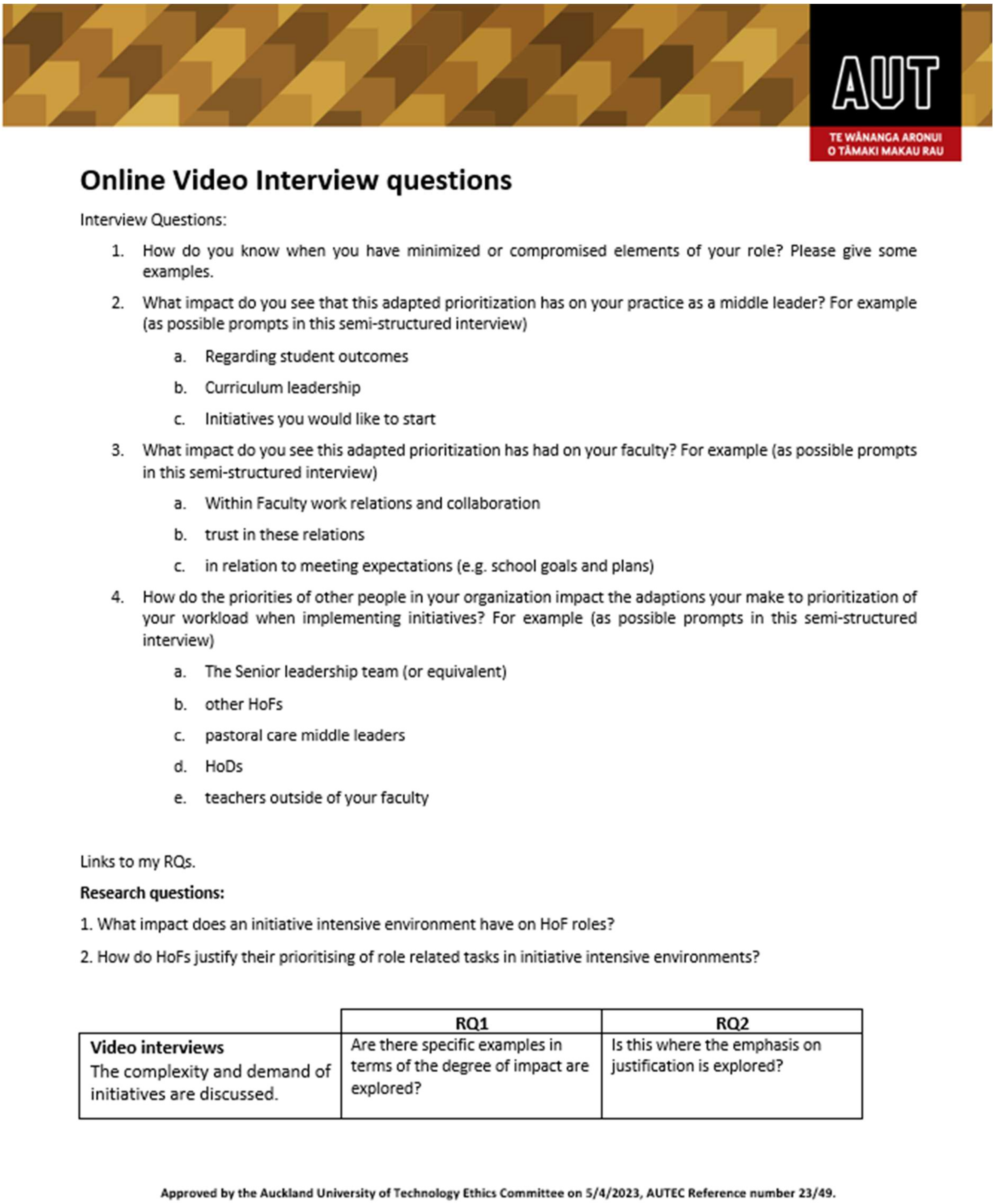
1. What impact does an initiative intensive environment have on HoF roles?

2. How do HoFs justify their prioritising of role related tasks in initiative intensive environments?

	RQ1	**RQ2**
Online survey Initiatives are only identified as context	Identify what consists of a HOF role. What overall impact do initiatives have?	Identifies what is prioritised and where in relation to other aspects of role.

Approved by the Auckland University of Technology Ethics Committee on 5/4/2023, AUTEC Reference number 23/49

Appendix B- Online Interview Questions and Potential Sub-Prompts



AUT
TE WĀNANGA ARONUI O TĀMAKI MAKAU RAU

Online Video Interview questions

Interview Questions:

1. How do you know when you have minimized or compromised elements of your role? Please give some examples.
2. What impact do you see that this adapted prioritization has on your practice as a middle leader? For example (as possible prompts in this semi-structured interview)
    a. Regarding student outcomes
    b. Curriculum leadership
    c. Initiatives you would like to start
3. What impact do you see this adapted prioritization has had on your faculty? For example (as possible prompts in this semi-structured interview)
    a. Within Faculty work relations and collaboration
    b. trust in these relations
    c. in relation to meeting expectations (e.g. school goals and plans)
4. How do the priorities of other people in your organization impact the adaptions your make to prioritization of your workload when implementing initiatives? For example (as possible prompts in this semi-structured interview)
    a. The Senior leadership team (or equivalent)
    b. other HoFs
    c. pastoral care middle leaders
    d. HoDs
    e. teachers outside of your faculty

Links to my RQs.

Research questions:

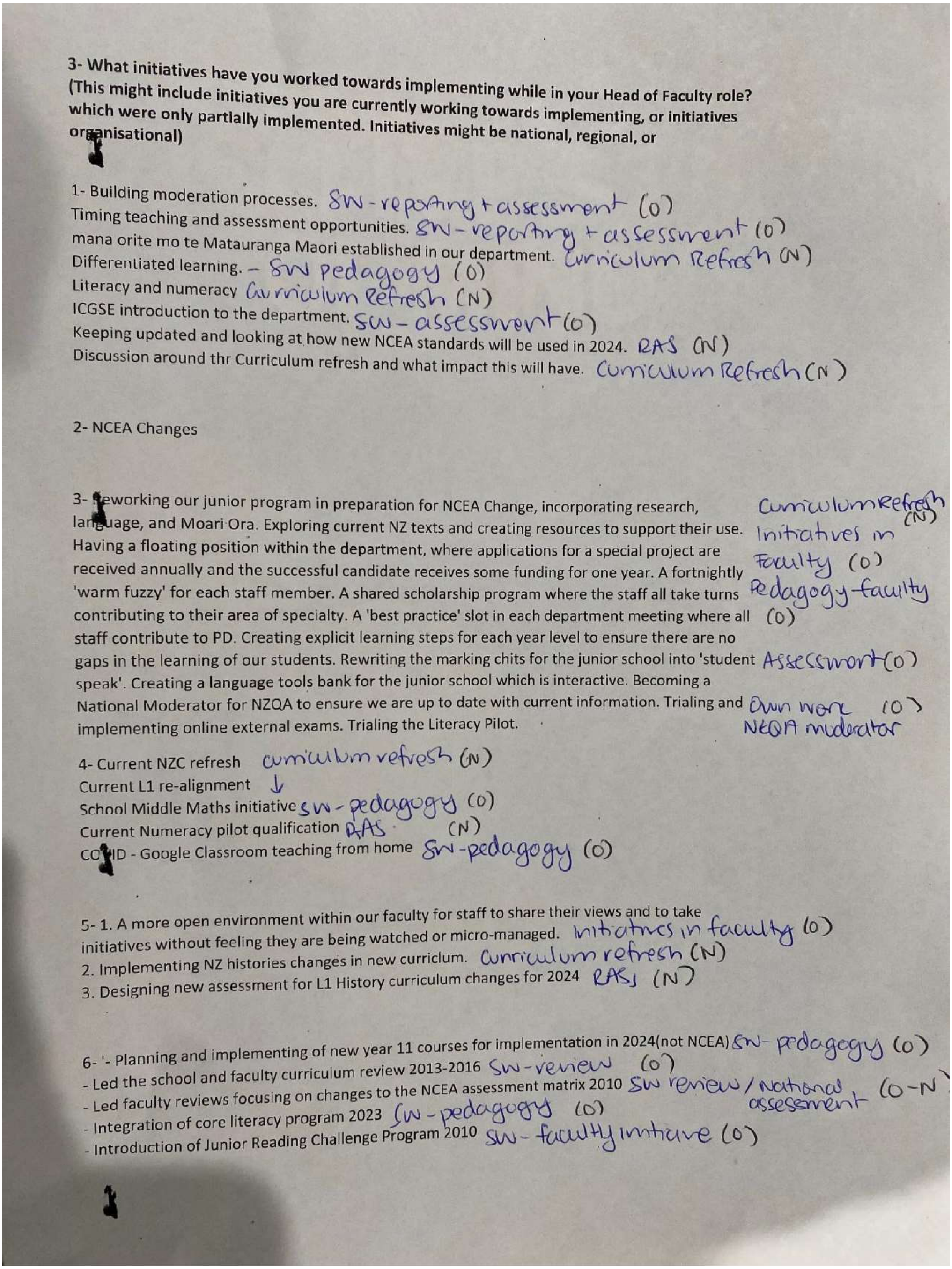
1. What impact does an initiative intensive environment have on HoF roles?

2. How do HoFs justify their prioritising of role related tasks in initiative intensive environments?

	RQ1	RQ2
Video interviews The complexity and demand of initiatives are discussed.	Are there specific examples in terms of the degree of impact are explored?	Is this where the emphasis on justification is explored?

Approved by the Auckland University of Technology Ethics Committee on 5/4/2023, AUTEC Reference number 23/49.

Appendix C- Example of Survey Data Coding



3- What initiatives have you worked towards implementing while in your Head of Faculty role? (This might include initiatives you are currently working towards implementing, or initiatives which were only partially implemented. Initiatives might be national, regional, or organisational)

1- Building moderation processes. SW - reporting + assessment (0)
Timing teaching and assessment opportunities. SW - reporting + assessment (0)
mana orite mo te Matauranga Maori established in our department. Curriculum Refresh (N)
Differentiated learning. – SW pedagogy (0)
Literacy and numeracy Curriculum Refresh (N)
ICGSE introduction to the department. SW - assessment (0)
Keeping updated and looking at how new NCEA standards will be used in 2024. RAS (N)
Discussion around thr Curriculum refresh and what impact this will have. Curriculum Refresh (N)

2- NCEA Changes

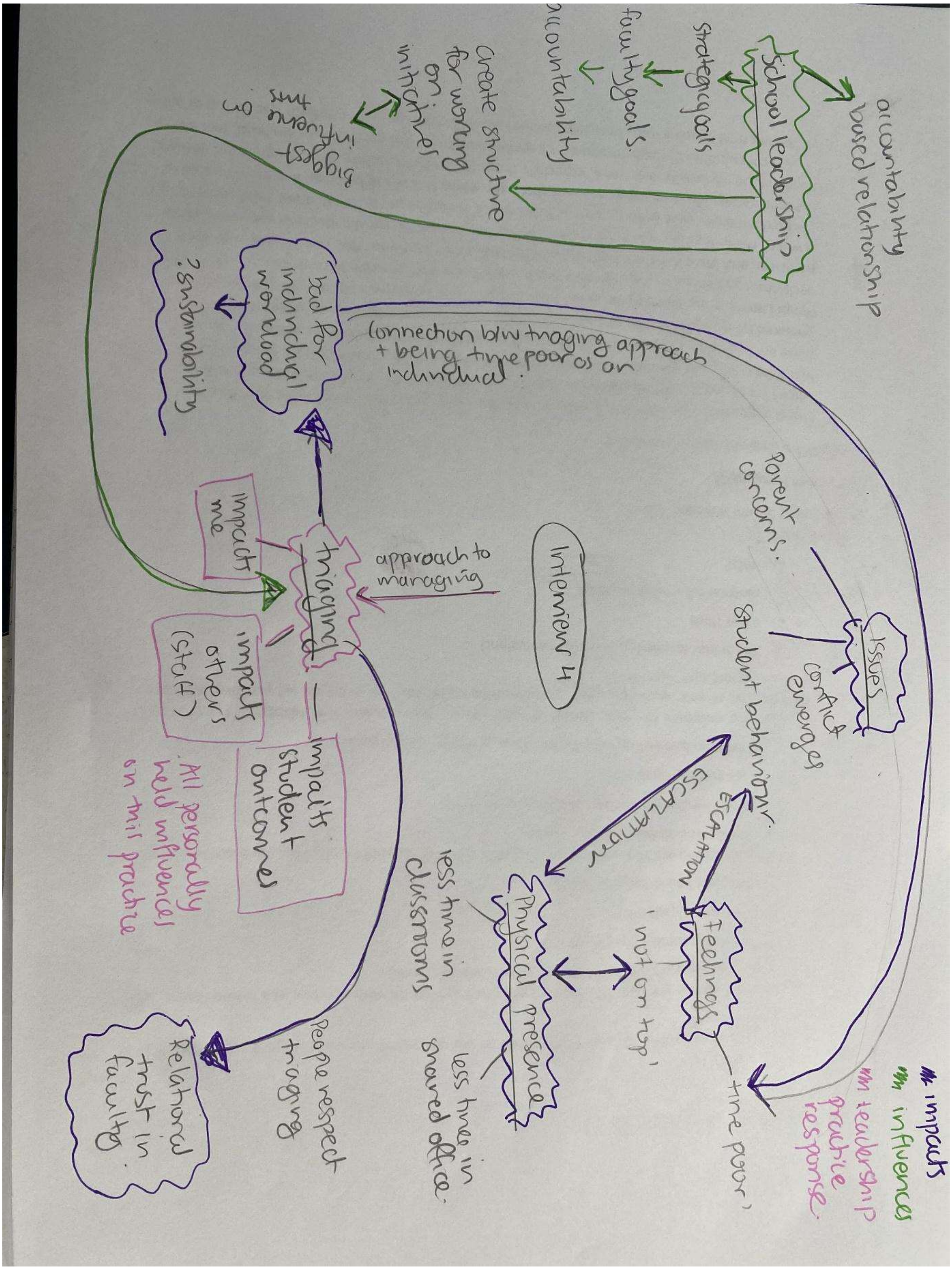
3- Reworking our junior program in preparation for NCEA Change, incorporating research, Curriculum Refresh (N)
language, and Moari Ora. Exploring current NZ texts and creating resources to support their use. Initiatives in
Having a floating position within the department, where applications for a special project are
received annually and the successful candidate receives some funding for one year. A fortnightly Faculty (0)
'warm fuzzy' for each staff member. A shared scholarship program where the staff all take turns Pedagogy-faculty
contributing to their area of specialty. A 'best practice' slot in each department meeting where all (0)
staff contribute to PD. Creating explicit learning steps for each year level to ensure there are no
gaps in the learning of our students. Rewriting the marking chits for the junior school into 'student Assessment (0)
speak'. Creating a language tools bank for the junior school which is interactive. Becoming a
National Moderator for NZQA to ensure we are up to date with current information. Trialing and Own work (0)
implementing online external exams. Trialing the Literacy Pilot. NZQA moderator

4- Current NZC refresh curriculum refresh (N)
Current L1 re-alignment ↓
School Middle Maths initiative SW - pedagogy (0)
Current Numeracy pilot qualification RAS (N)
COVID - Google Classroom teaching from home SW - pedagogy (0)

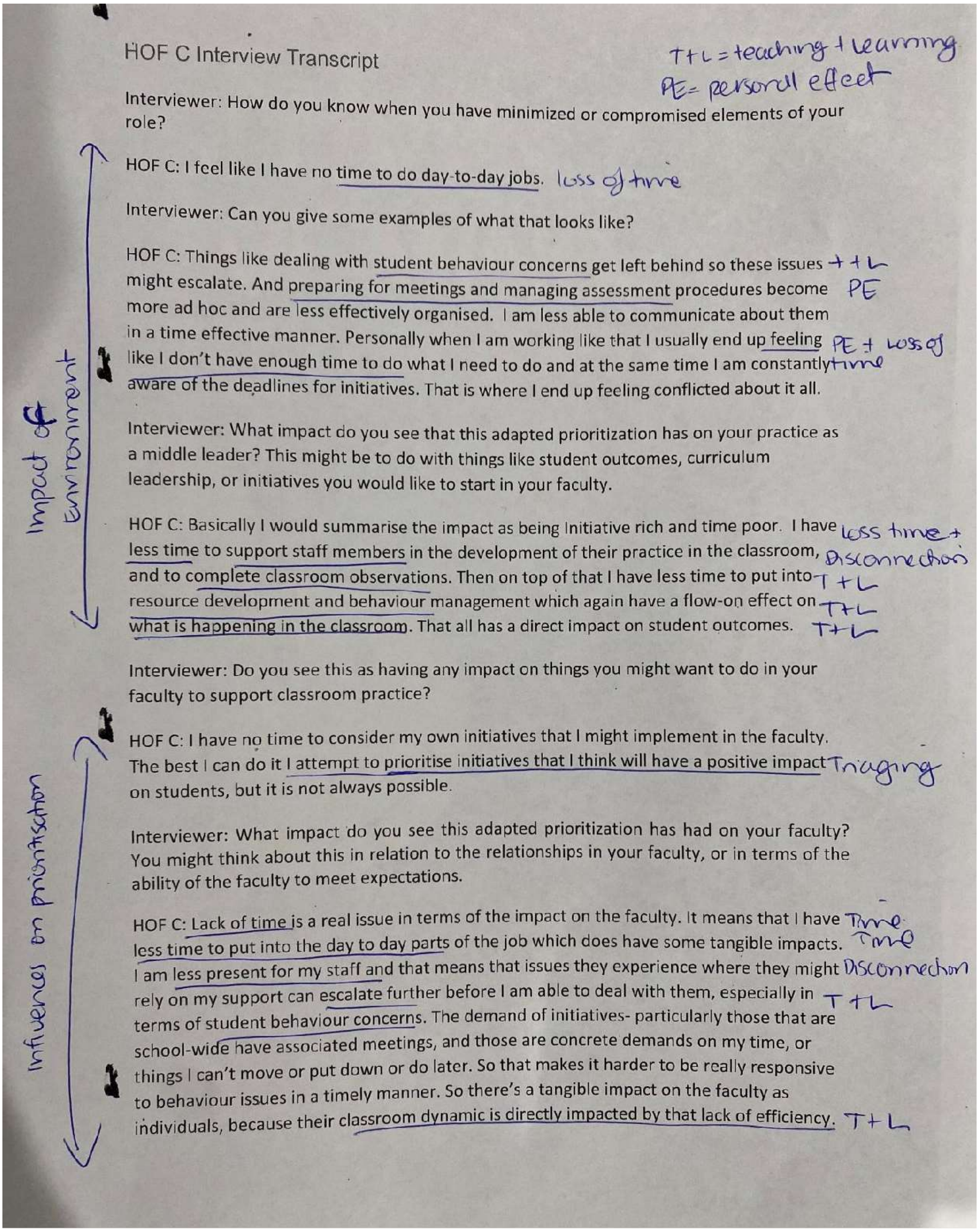
5- 1. A more open environment within our faculty for staff to share their views and to take initiatives without feeling they are being watched or micro-managed. initiatives in faculty (0)
2. Implementing NZ histories changes in new curriclum. Curriculum refresh (N)
3. Designing new assessment for L1 History curriculum changes for 2024 RAS (N)

6- '- Planning and implementing of new year 11 courses for implementation in 2024(not NCEA) SW - pedagogy (0)
- Led the school and faculty curriculum review 2013-2016 SW - review (0)
- Led faculty reviews focusing on changes to the NCEA assessment matrix 2010 SW review / national assessment (0-N)
- Integration of core literacy program 2023 SW - pedagogy (0)
- Introduction of Junior Reading Challenge Program 2010 SW - faculty initiative (0)

Appendix D- Example of Interview Mind-Map


impacts
influences
leadership practice response.
Interview 4
accountability based relationship
School leadership?
strategic goals
faculty goals.
accountability
Create structure for working on initiatives
biggest influence on time
Connection b/w triaging approach + being time poor as an individual.
bad for individual workload
?sustainability
Parent concerns.
Issues
conflict emerges
student behaviour.
ESCALATION
ESCALATION
Feelings
'not on top'
'time poor'
Physical presence
less time in classrooms
less time in shared office.
approach to managing
triaging
impacts me
impacts others (staff)
impacts student outcomes
All personally held influences on this practice
people respect triaging
Relational trust in faculty.

Appendix E- Extract from Coded Interview Transcript



HOF C Interview Transcript

T+L = teaching + learning
PE = personal effect

Interviewer: How do you know when you have minimized or compromised elements of your role?

HOF C: I feel like I have no time to do day-to-day jobs. loss of time

Interviewer: Can you give some examples of what that looks like?

HOF C: Things like dealing with student behaviour concerns get left behind so these issues might escalate. T+L And preparing for meetings and managing assessment procedures become more ad hoc and are less effectively organised. PE I am less able to communicate about them in a time effective manner. Personally when I am working like that I usually end up feeling like I don't have enough time to do what I need to do and at the same time I am constantly aware of the deadlines for initiatives. PE + loss of time That is where I end up feeling conflicted about it all.

Impact of Environment

Interviewer: What impact do you see that this adapted prioritization has on your practice as a middle leader? This might be to do with things like student outcomes, curriculum leadership, or initiatives you would like to start in your faculty.

HOF C: Basically I would summarise the impact as being Initiative rich and time poor. I have less time to support staff members in the development of their practice in the classroom, Loss time + Disconnection and to complete classroom observations. Then on top of that I have less time to put into T+L resource development and behaviour management which again have a flow-on effect on T+L what is happening in the classroom. That all has a direct impact on student outcomes. T+L

Interviewer: Do you see this as having any impact on things you might want to do in your faculty to support classroom practice?

HOF C: I have no time to consider my own initiatives that I might implement in the faculty. The best I can do it I attempt to prioritise initiatives that I think will have a positive impact Triaging on students, but it is not always possible.

Interviewer: What impact do you see this adapted prioritization has had on your faculty? You might think about this in relation to the relationships in your faculty, or in terms of the ability of the faculty to meet expectations.

HOF C: Lack of time is a real issue in terms of the impact on the faculty. Time It means that I have less time to put into the day to day parts of the job which does have some tangible impacts. Time I am less present for my staff and that means that issues they experience where they might Disconnection rely on my support can escalate further before I am able to deal with them, especially in T+L terms of student behaviour concerns. The demand of initiatives- particularly those that are school-wide have associated meetings, and those are concrete demands on my time, or things I can't move or put down or do later. So that makes it harder to be really responsive to behaviour issues in a timely manner. So there's a tangible impact on the faculty as individuals, because their classroom dynamic is directly impacted by that lack of efficiency. T+L

Influences on prioritisation

Appendix F1- Participant Contact Email

Kei te rangatira, tēnā koe

My name is Claire Moorhead and I am currently a Masters student in Educational Leadership at the AUT. I am looking for volunteers to participate in a survey for my Masters' research dissertation at AUT.

Project Title: **The impact of initiative intensive environments on Secondary HOF role prioritisation.**

The purpose of this research project is to explore the experiences of secondary school Heads of Faculty working in 'initiative intensive' environments. The research aims to find out how Heads of Faculty adapt their leadership practice to accommodate the additional workload associated with initiative implementation.

What is involved?

A short survey of 7 open questions will be sent to people who express interest in participating in this research project. The survey will take between 20 and 30 minutes to complete, and you will have a 2 week period to do so. At the end of the survey you will be offered the opportunity to volunteer to participate in a follow up interview. Interviews will involve discussion of 4 additional questions with the research via a digital platform, which will be audio recorded.

For more information about this research project please see the **Participant Information Sheet HERE** or contact:

Primary Researcher: Claire Moorhead: emailed removed later

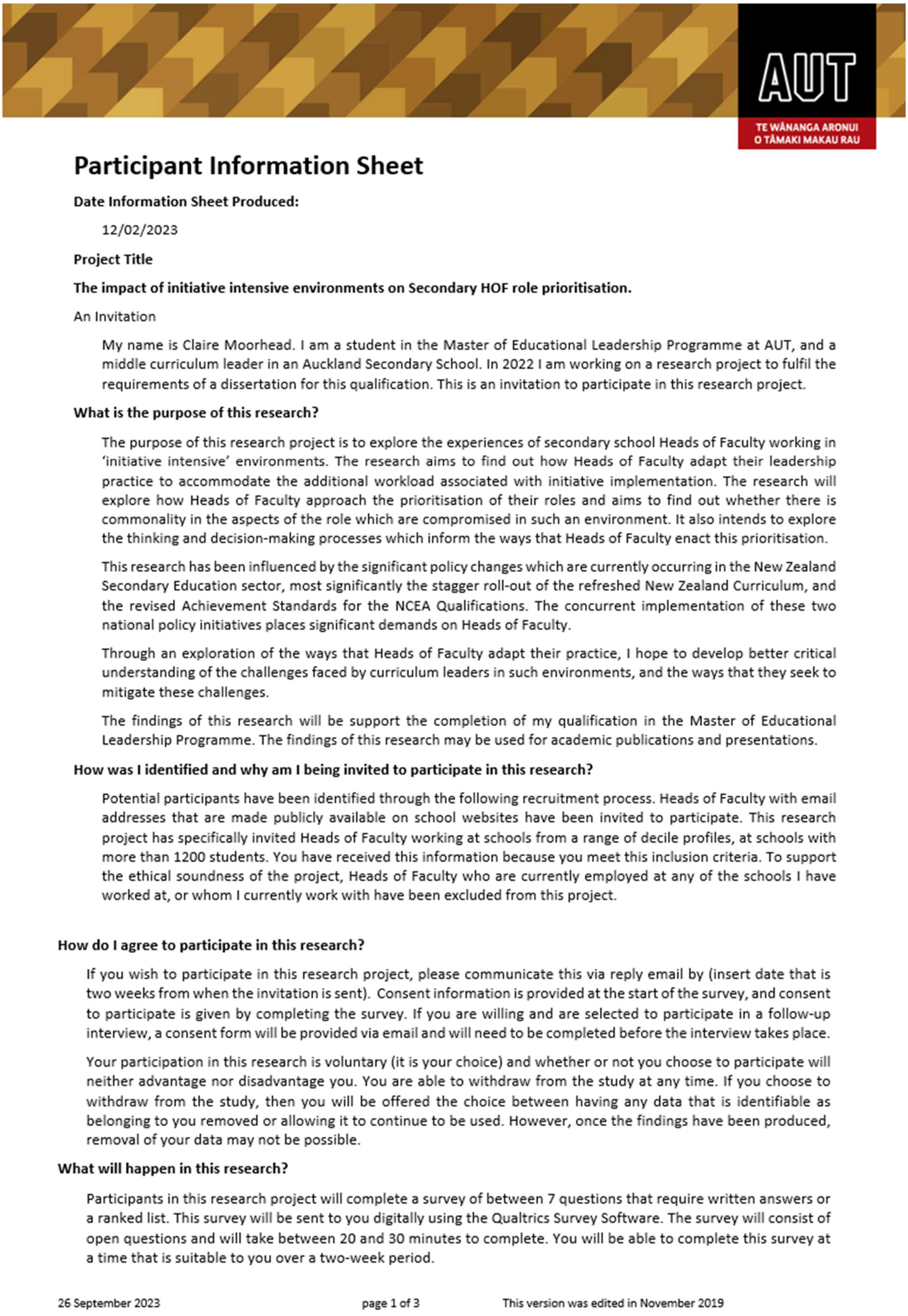
Supervisors Dr Howard Youngs howard.youngs@aut.ac.nz

Keen to be involved?

If you are interested in taking part, **please follow this link HERE** to give your consent and complete the initial survey or alternatively email the student researcher directly.

Approved by Auckland University of Technology Ethics Committee on 5/4/23 Reference Number 23/49

Appendix F2- Participant Information Sheet



TE WĀNANGA ARONUI O TĀMAKI MAKAU RAU

Participant Information Sheet

Date Information Sheet Produced:

12/02/2023

Project Title

The impact of initiative intensive environments on Secondary HOF role prioritisation.

An Invitation

My name is Claire Moorhead. I am a student in the Master of Educational Leadership Programme at AUT, and a middle curriculum leader in an Auckland Secondary School. In 2022 I am working on a research project to fulfil the requirements of a dissertation for this qualification. This is an invitation to participate in this research project.

What is the purpose of this research?

The purpose of this research project is to explore the experiences of secondary school Heads of Faculty working in ‘initiative intensive’ environments. The research aims to find out how Heads of Faculty adapt their leadership practice to accommodate the additional workload associated with initiative implementation. The research will explore how Heads of Faculty approach the prioritisation of their roles and aims to find out whether there is commonality in the aspects of the role which are compromised in such an environment. It also intends to explore the thinking and decision-making processes which inform the ways that Heads of Faculty enact this prioritisation.

This research has been influenced by the significant policy changes which are currently occurring in the New Zealand Secondary Education sector, most significantly the stagger roll-out of the refreshed New Zealand Curriculum, and the revised Achievement Standards for the NCEA Qualifications. The concurrent implementation of these two national policy initiatives places significant demands on Heads of Faculty.

Through an exploration of the ways that Heads of Faculty adapt their practice, I hope to develop better critical understanding of the challenges faced by curriculum leaders in such environments, and the ways that they seek to mitigate these challenges.

The findings of this research will be support the completion of my qualification in the Master of Educational Leadership Programme. The findings of this research may be used for academic publications and presentations.

How was I identified and why am I being invited to participate in this research?

Potential participants have been identified through the following recruitment process. Heads of Faculty with email addresses that are made publicly available on school websites have been invited to participate. This research project has specifically invited Heads of Faculty working at schools from a range of decile profiles, at schools with more than 1200 students. You have received this information because you meet this inclusion criteria. To support the ethical soundness of the project, Heads of Faculty who are currently employed at any of the schools I have worked at, or whom I currently work with have been excluded from this project.

How do I agree to participate in this research?

If you wish to participate in this research project, please communicate this via reply email by (insert date that is two weeks from when the invitation is sent). Consent information is provided at the start of the survey, and consent to participate is given by completing the survey. If you are willing and are selected to participate in a follow-up interview, a consent form will be provided via email and will need to be completed before the interview takes place.

Your participation in this research is voluntary (it is your choice) and whether or not you choose to participate will neither advantage nor disadvantage you. You are able to withdraw from the study at any time. If you choose to withdraw from the study, then you will be offered the choice between having any data that is identifiable as belonging to you removed or allowing it to continue to be used. However, once the findings have been produced, removal of your data may not be possible.

What will happen in this research?

Participants in this research project will complete a survey of between 7 questions that require written answers or a ranked list. This survey will be sent to you digitally using the Qualtrics Survey Software. The survey will consist of open questions and will take between 20 and 30 minutes to complete. You will be able to complete this survey at a time that is suitable to you over a two-week period.

On completion of this initial survey, you will be provided with a link to a separate survey which will allow you to indicate if you wish to be considered to take part in a follow-up interview. Participation in the interview process is voluntary. Follow-up interviews will involve discussion of 4 additional questions with the researcher. If you express interest and are selected to participate in an interview, a time will be made which is suitable to you. Interviews can take place online to minimise the impact participation will have on your time. Interviews will be recorded, and transcripts will be provided for participants to review.

What are the discomforts and risks?

I do not anticipate that completing the survey or participating in the interview will present any risks However it is possible some of the questions may evoke an emotional response. You do not have to answer any questions that make you uncomfortable.

How will these discomforts and risks be alleviated?

You may choose not to talk about experiences or choose not to answer any questions that you find distressing or uncomfortable. You may also choose to withdraw from the interview and / or the study at any time.

What are the benefits?

As a participant, there is no direct benefit to yourself for participating in this research. However, you might gain some satisfaction and insight from reflecting on this part of your work and contributing to the body of knowledge around the experience of HoFs and their management of workload. This may contribute to a better understanding of the pressures faced in this role.

This research will support me to fulfil the requirements of a dissertation as part of my completion of the Master of Educational Leadership Qualification.

How will my privacy be protected?

As a participant your privacy will be protected in several ways. Your privacy is protected through the protection of all data collected.

1. Throughout the research process the data will only be accessibly by myself and my supervisor.
2. At the conclusion of the research process, data will be stored securely by AUT for a standard period of 6 years, when it will then be destroyed.
3. In any publication of the findings of the research, your identity will be protected by providing pseudonyms, and obscuring identifying details to protect confidentiality.

What are the costs of participating in this research?

Participation in the survey will take between 20 and 30 minutes of your time. If you elect to participate in a follow-up interview, this will take an additional 30 minutes.

What opportunity do I have to consider this invitation?

You have 2 weeks to consider your participation in this research process. Participants will be selected from the responses received by (date to be updated on AUTEC approval). It would be appreciated if you could advise of your intended participation in this study within two weeks of receiving this information sheet.

Will I receive feedback on the results of this research?

When the research project is completed, you will be provided a summary of the findings via email if you decide to complete the survey.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, *Howard Youngs, howard.youngs@AUT.ac.nz, 09 921 9999 ext 9633*

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEC, *ethics@aut.ac.nz* , (+649) 921 9999 ext 6038.

Whom do I contact for further information about this research?

Please keep this Information Sheet and a copy of the Consent Form for your future reference. You are also able to contact the research team as follows:

Researcher Contact Details:

Claire Moorhead. [redacted]

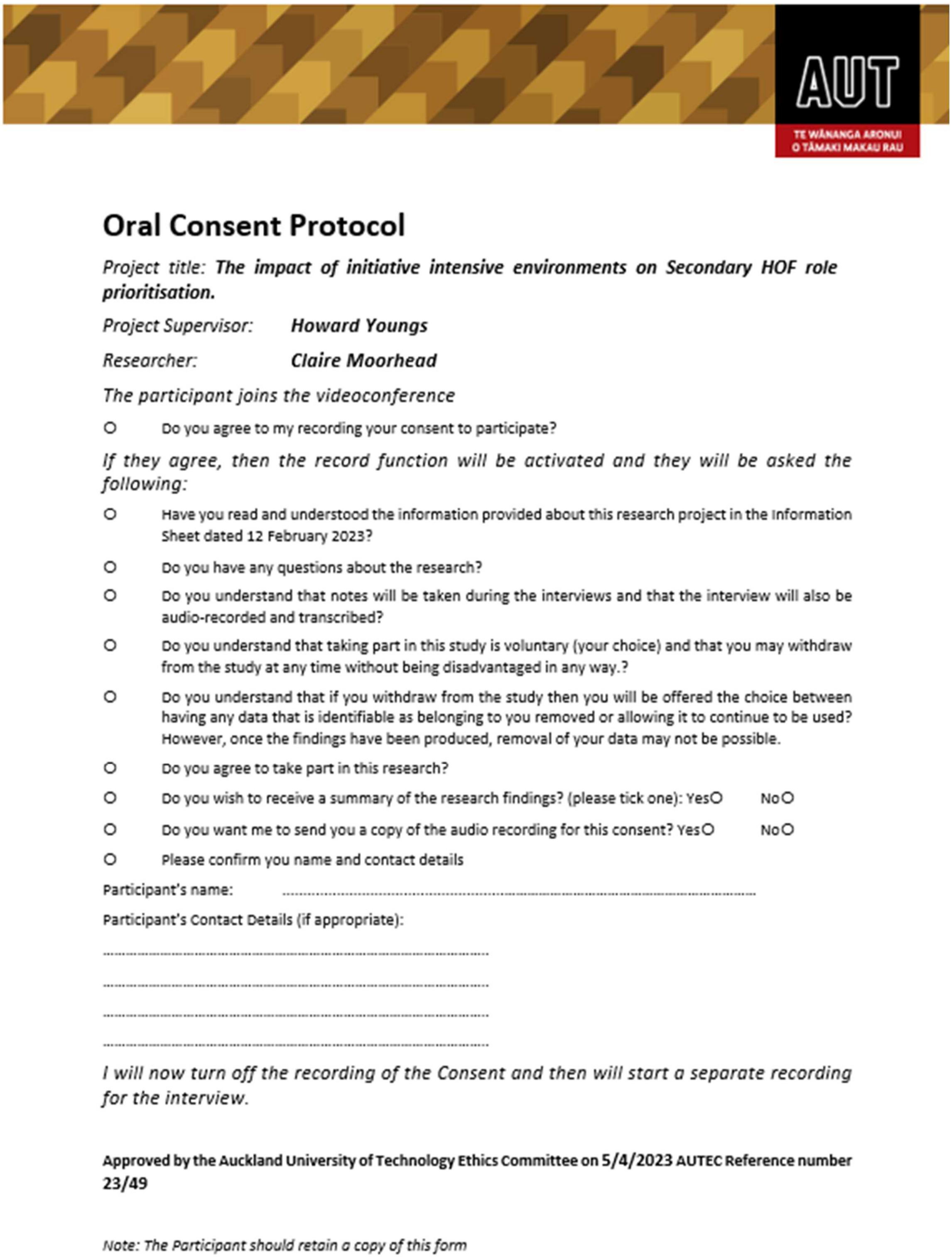
Project Supervisor Contact Details:

Howard Youngs, howard.youngs@AUT.ac.nz, 09 921 9999 ext 9633

Provide the name and all relevant contact details. Note that for personal safety reasons, AUTEC does not allow researchers to provide home addresses or phone numbers.

Approved by the Auckland University of Technology Ethics Committee on 5/4/2023, AUTEC Reference number 23/49.

Appendix F3- Online Interview Consent Form



Oral Consent Protocol

Project title: ***The impact of initiative intensive environments on Secondary HOF role prioritisation.***

Project Supervisor: ***Howard Youngs***

Researcher: ***Claire Moorhead***

The participant joins the videoconference

○ Do you agree to my recording your consent to participate?

If they agree, then the record function will be activated and they will be asked the following:

○ Have you read and understood the information provided about this research project in the Information Sheet dated 12 February 2023?

○ Do you have any questions about the research?

○ Do you understand that notes will be taken during the interviews and that the interview will also be audio-recorded and transcribed?

○ Do you understand that taking part in this study is voluntary (your choice) and that you may withdraw from the study at any time without being disadvantaged in any way.?

○ Do you understand that if you withdraw from the study then you will be offered the choice between having any data that is identifiable as belonging to you removed or allowing it to continue to be used? However, once the findings have been produced, removal of your data may not be possible.

○ Do you agree to take part in this research?

○ Do you wish to receive a summary of the research findings? (please tick one): Yes○ No○

○ Do you want me to send you a copy of the audio recording for this consent? Yes○ No○

○ Please confirm you name and contact details

Participant's name: ....

Participant's Contact Details (if appropriate):

....

....

....

....

I will now turn off the recording of the Consent and then will start a separate recording for the interview.

Approved by the Auckland University of Technology Ethics Committee on 5/4/2023 AUTEC Reference number 23/49

Note: The Participant should retain a copy of this form