

Middle Management: Role, Practices and Challenges on Educational Leadership Practices

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Abstract

Recent studies highlight the significant impact of middle management leadership on educational success. In Catalonia, school leadership is managed by a team composed of the Principal, Head of Studies, and Secretary. This research, using a sequential mixed-method design divided in three phases, analyses the functions of the Head of Studies in primary schools and the needs that arise from their role. The study provides a focused analysis of this often-overlooked role, including a gender perspective. Data was collected through a questionnaire with a reliability of 0.904 in Cronbach's Alpha and semi-structured interviews. The Phase 1 sample included 362 participants, 20.4% of whom were held the role of Head of Studies, with the majority being women (89.2%). Phase 2 focused on eight participants in leadership positions. The study evaluated 62 management functions across four dimensions (D1: leadership; D2: management, D3: pedagogical; D4: professional development), attributing seven key functions to the Head of Studies, including leadership, implementation of educational practices, teacher coordination, and academic scheduling. Results from the Confirmation and Chi-Square tests emphasize the importance of the Head of Studies in the pedagogical dimension (D3) and, to a lesser extent, in promoting professional development (D4). However, training gaps and a lack of specific support for the role were identified, underlining the need for further research to enhance middle management in Catalan schools. This study offers an integrated understanding of the Head of Studies' role, emphasizing their significant involvement in educational leadership while revealing deficiencies in training and support. These insights could inform the development of targeted educational policies and training programs specifically designed to enhance the effectiveness and impact of this crucial role.

Keywords: Educational Leadership, Middle Management, Management Team, Head of Studies

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Introduction

International studies highlight the growing interest in examining the roles, practices, and responsibilities of middle leaders in schools (Motshaki et al., 2022). Although there is limited evidence demonstrating a direct impact on student learning, Tang et al. (2022) agree on the potential influence that middle leaders' practices have on teaching and learning. According to research by Highfield et al. (2022), the actions of middle leaders have a direct and significant impact on students' academic outcomes, particularly in disadvantaged settings.

An analysis of three models of middle leadership practices (Grootenboer, Edward-Groves, Rönnerman, 2020; Highfield et al., 2022; Tang et al., 2022) emphasizes that key functions of this role include leading teaching teams, supporting staff development, and creating conditions for both individual and collective success. Gairín and Armengol (1996) had already noted that effective educational practices require the commitment of teaching staff and sufficient knowledge. Therefore, in addition to pedagogical responsibilities, they attributed to the Head of Studies an important role in fostering teachers' professional development. However, these authors also highlighted the need to define and delimit the role's functions to provide appropriate training. Tang et al. (2022) similarly note that middle leaders often have limited experience in these functions, underscoring the importance of targeted professional development specifically adapted to the real responsibilities they carry out.

To review the legal framework governing the duties of the Head of Studies, it is necessary to refer to Royal Decree 82/1996, of January 26, which approves the Organic Regulations of Infant and Primary Education Schools. Subsequent laws offer no new or additional information. The RD 82/1996 establishes that the Head of Studies is responsible for coordinating and supervising all academic activities, ensuring the effective implementation of the educational project, curricular projects, and the general annual program (e.g., preparing and fulfilling academic schedules, organizing academic events, managing tutorial activities). Additionally, the Head must promote ongoing teacher training and support school community engagement. In the absence of the Director, the Head of Studies assumes their functions, according to current regulations.

Within the leadership team, the Head of Studies serves as a liaison between the administration, school management, community, families, and students (Highfield, 2010). Fundamentally, this role focuses on the management, implementation, coordination, and supervision of academic activities, as well as promoting teacher professional development through fostering a positive educational climate and culture (Cuadrado, 2010; Leithwood, 2016).

The growing recognition of middle leaders' importance in educational institutions highlights the need for further research into the role of the Head of Studies. It is essential to deepen the understanding of how this role is carried out in schools and to explore key issues related to it (Edwards-Groves et al., 2016; Motshaki et al., 2022). This study aims to thoroughly analyze the specific functions of the Head of Studies within the leadership team, identifying potential training or other needs arising from this role. Through this research, the goal is not only to better understand the Head of Studies' responsibilities but also to propose strategies to optimize their performance and address the challenges associated with their educational leadership.

Method

The research presented is part of a broader mixed-method study, structured in three phases: quantitative-qualitative-qualitative. The results discussed correspond to Phases 1 and 2. The objective of Phase 1: Quantitative, where an ad hoc multi-response questionnaire was applied, is to identify the functions attributed to each position within the school leadership team, specifically focusing on those assigned to the Head of Studies. In Phase 2: Qualitative, semi-structured interviews were conducted based on Phase 1 results, aiming to explore the professional development needs of the Head of Studies related to their responsibilities.

Instrument Validation

The questionnaire was validated through expert judgment, involving four theoretical and five practical experts. Based on their feedback, adjustments were made to improve the instrument. Internal consistency was evaluated using Cronbach's Alpha, which yielded a coefficient of 0.904, indicating high reliability. Upon reviewing the 62 questionnaire items, no significant improvements were found by removing any, further confirming the instrument's robustness.

The semi-structured interview design and validation were based on Phase 1 results, focusing on function attribution according to the position held in the leadership team. Three interview guides were developed, consisting of a common section addressing general questions on school leadership and a specific section with questions tailored to the functions associated with the respondent's role.

Participants

The total sample in Phase 1 comprised N = 362 participants, with 20.4% holding the position of Head of Studies. When disaggregating the role by gender, it was found that 89.2% of Heads of Studies were women, compared to 10.8% men. Notably, 40% reported receiving no specific training for their role (see Figure 1).

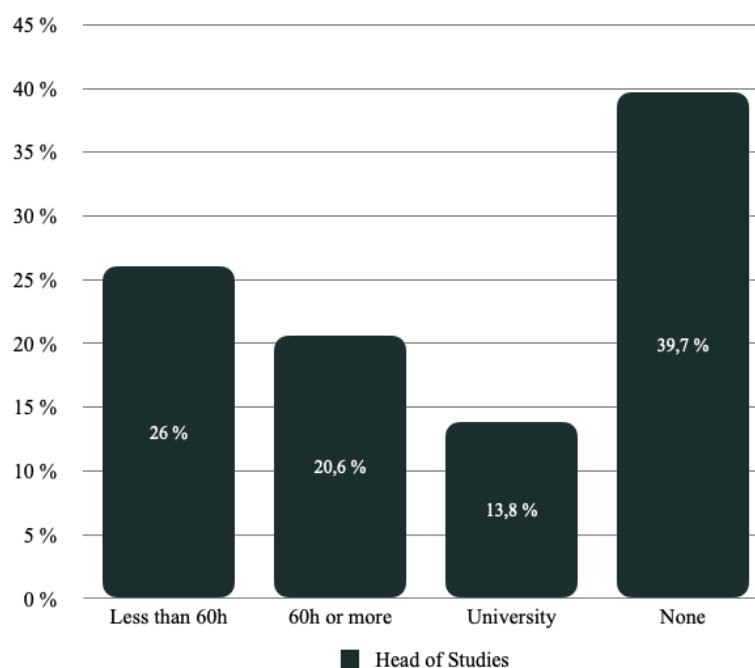


Figure 1: Training Profile of the Head of Studies

This finding is confirmed by the responses collected in Phase 2, where one of the Heads of Studies commented:

F2E8: “(...) We lack the knowledge of how the day-to-day of a Head of Studies works. You can have the information, sure, but it’s all very general. In my opinion, there should be a more natural way of training Heads of Studies once they take on the role, especially in management aspects, because a big part of the job is about management. For example, dealing with leaves, substitutions, and how to create schedules.”

In Phase 2, the sample included N = 8 participants: six Directors, one Head of Studies, and one Secretary. Of these, six were women and two men. The participants were selected from the Phase 1 sample, and all agreed to continue participating in subsequent stages of the study. All participants stated that they engage in continuous professional development, with most training provided by the Department of Education or other recognized institutions. Courses covered a wide range of topics, including didactics, curriculum, linguistic investment plans, methodologies, office automation, educational innovation, and digital tools.

Results

This section is organized around a detailed analysis of the 62 leadership functions (see Appendix 1) distributed across four key dimensions: institutional leadership, management of the educational organization, management of teaching and learning processes, and promotion of staff development within the school. Firstly, the functions assigned to each leadership role—Headmaster, Head of Studies, and Secretary—are outlined in Phase 1, providing a comparative view of their respective involvement in these dimensions. Secondly, the Phase 2 results highlight the priorities, challenges, and professional development needs associated with these dimensions, emphasizing their significance for the effective performance of school leadership.

The analysis shows that, out of the 62 functions, seven are directly attributed to the Head of Studies.

Table 1: Total Number of Items by Role and Dimension

No. items	Dimensions / Charge	HD	HS	SE	NO MT
11	D1: Institutional Leadership	10	0	1	0
23	D2: Management of the Educational Organization	18	4	1	0
14	D3: Management of Teaching and Learning Processes	11	3	0	0
14	D4: Promotion of Staff Development	14	0	0	0
62	Total	53	7	2	0

These include tasks such as implementing school projects (D2F2), preparing academic timetables (D2F7), coordinating committees (D2F11), and overseeing teaching teams (D2F12). The Head of Studies also plays a key role in ensuring the curriculum is properly aligned (D3F1), driving improvements in teaching and learning processes (D3F4), and leading educational practices (D3F5). These functions collectively highlight the Head of Studies as a pivotal figure in ensuring smooth coordination and a cohesive school environment, while also significantly contributing to pedagogical development and academic success.

Considering the cumulative responses by role, the Head of Studies has the highest level of involvement in the pedagogical dimension, with an 80% attribution rate, followed by a 70% rate in staff professional development.

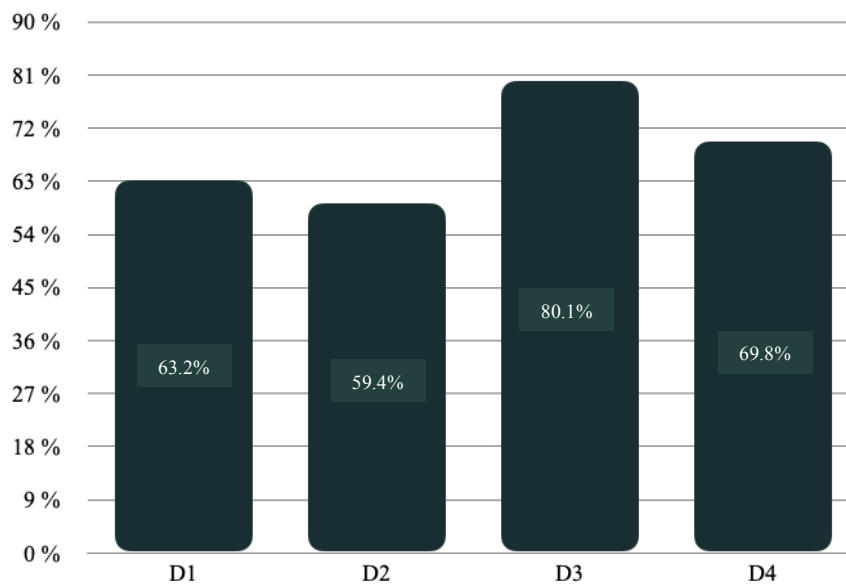


Figure 2: Cumulative Percentage by Dimension for the Role of Head of Studies

These results align with those of the inferential analysis, where the Head of Studies consistently exceeded expectations in terms of responsibility, outperforming the Headmaster's responses in seven functions (Graph 3). This confirms the critical role of the Head of Studies in the pedagogical dimension. In D4, dimension related to staff development, the Head of Studies also showed slightly elevated results, though without standing out significantly.

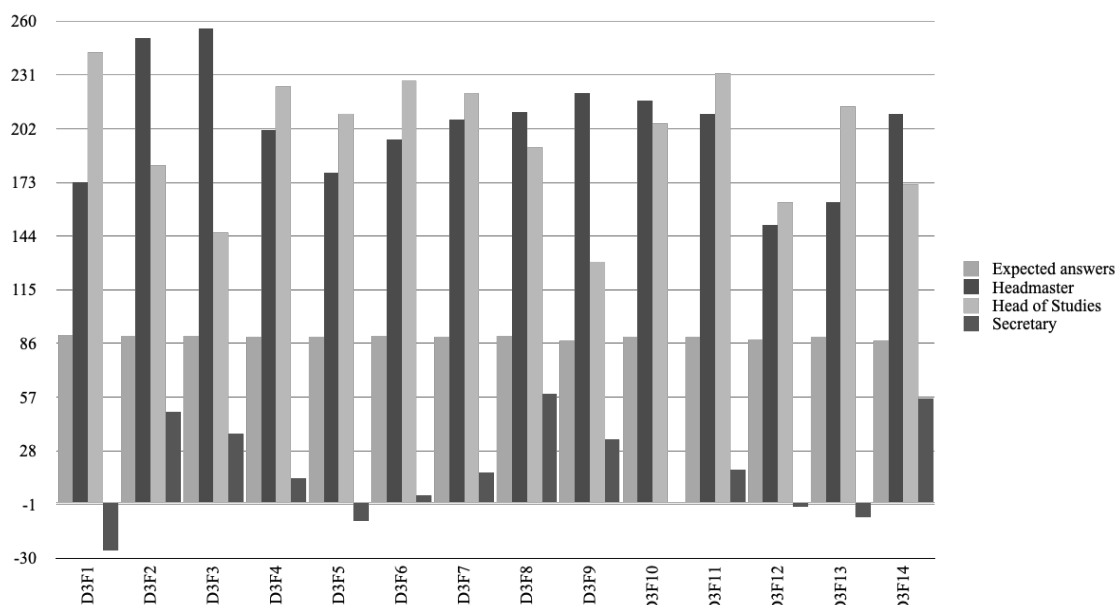


Figure 3: Inferential Study Comparison: Conformity Test

In the Chi-Square test, there was a noticeable trend where participants tended to self-attribute functions based on their role (Graph 4). Of the 38 functions with statistically significant

results, the Head of Studies self-attributed 29, though not all functions aligned with the legal framework. Notably, 20 functions were self-assigned by multiple leadership roles, even though they were not specifically designated in legal frameworks.

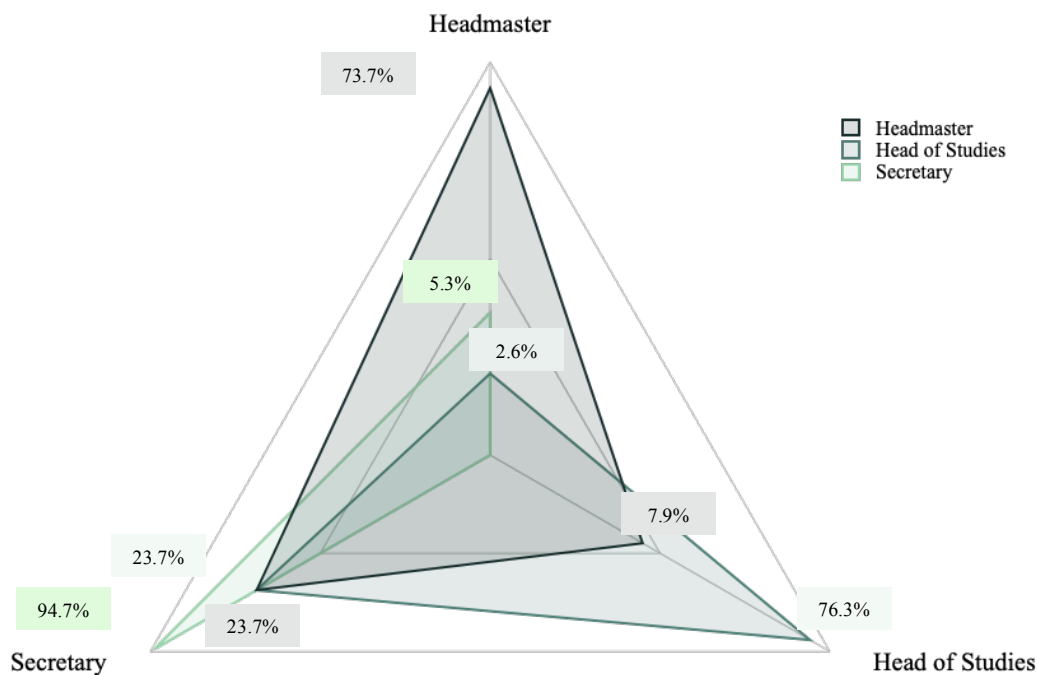


Figure 4: Representation of Statistically Significant Values in the Chi-Square Test

In Stage 2, the analysis was structured into three categories: priorities, challenges, and professional development needs, across the four leadership dimensions. In D1: Institutional Leadership, the Head of Studies' priorities include strategic planning, defining the school's mission and vision, and, crucially, communicating these core elements to the rest of the team. The main challenge identified was in evaluating progress and determining whether objectives were being met. Additionally, there was a recognized need for improvements in school climate and meeting management.

In D2: Management of the Educational Organization, both the priority and challenge converged on timetable creation, with specific training needed in this area for optimal performance.

Regarding D3: Management of Teaching and Learning Processes, the Head of Studies emphasized the importance of setting educational objectives, not just planning them but sharing and coordinating with the team to achieve them. A key challenge was knowledge of the legislation and curriculum, highlighting the need for guidance and support in performing pedagogical functions.

Finally, in D4: Promotion of Staff Development, both priorities and challenges centered on identifying teachers' training needs. There was a strong emphasis on training related to team management, with the aim of fostering their professional and emotional development.

Discussion

The findings of this study align with international research highlighting the critical role of middle leaders in educational settings. While previous studies, such as those by Motshaki et al. (2022), emphasize the growing interest in understanding middle leadership, the results of this research provide new insights into the specific role of the Head of Studies in schools. Consistent with Highfield et al. (2022), this study confirms that middle leaders, Head of Studies in the territory of Catalonia, have significantly influence in teaching and learning processes, particularly through their coordination and leadership of pedagogical initiatives. However, it also reflects Tang et al.'s (2022) assertion that the direct impact of this role on student outcomes is complex and mediated by other factors.

In terms of practice, the functions identified in this study closely resemble those described by Grootenboer et al. (2020), highlighting the importance of leading teaching teams, managing educational projects, and fostering professional development. These alignments support the notion that the Head of Studies' responsibilities go beyond administrative tasks, emphasizing their pivotal role in shaping educational outcomes.

The findings highlight discrepancies between the functions outlined in Royal Decree 82/1996 and the external and self-attributed responsibilities reported by participants. This misalignment underscores the need to update and clarify the regulatory framework to better align with the evolving demands of school leadership. Moreover, the study reveals significant overlap in responsibilities among leadership team roles, particularly the self-attribution of functions not explicitly assigned by law. Addressing these overlaps through clearer role definitions could enhance collaboration, reduce redundancy, and optimize the effectiveness of leadership teams.

The cumulative total of responses attributed to the role of the Head of Studies in Dimension 3 (Management of Teaching and Learning Processes) accounts for 80% of the responses, while in Dimension 4 (Promotion of Staff Development), it represents 69.8%. This aligns with Gairín and Armengol's (1996) early recognition of the Head of Studies' influence in driving professional development and ensuring effective teaching practices.

The consistency between the Phase 1 functions and the Phase 2 priorities and challenges indicates coherence in the perception of the role across participants. For example, the emphasis on staff development in D4 reflects both the priorities of the Head of Studies and their challenges in managing and supporting teaching teams. Similarly, the focus on timetable creation in D2 highlights the dual need for technical expertise and strategic planning in this area.

Finally, the findings corroborate Tang et al.'s (2022) observation of middle leaders often lacking sufficient training in their specific functions. The identification of priorities and challenges, such as gaps in legislative knowledge and the need for training in team management, confirms that targeted professional development is a key requirement for optimizing their performance.

Conclusions

The study confirms that the Head of Studies plays a central role in coordinating pedagogical processes and fostering the professional development of teaching staff. This is particularly evident in the management of teaching and learning processes (Dimension 3) and the promotion of staff development (Dimension 4). Specifically, 80% of the functions attributed to the role fall under Dimension 3, while 69.8% relate to Dimension 4, highlighting the Head of Studies' significant contributions in these critical areas.

Discrepancies were identified between the functions established in the current legal framework and the responsibilities attributed by participants. These gaps underscore the need to update and clarify the regulatory framework to better reflect the evolving demands and realities of school leadership.

The analysis revealed significant overlaps in responsibilities among different leadership roles within the team. Certain functions were self-attributed by the Head of Studies as well as by other members, despite not being explicitly assigned in the legal framework. This overlap highlights the need for clearer role definitions to optimize collaboration and reduce redundancy within leadership teams.

The results show strong coherence between the functions identified in Phase 1 and the priorities, challenges, and training needs outlined in Phase 2. This consistency indicates a shared understanding of the role, emphasizing areas such as staff development, pedagogical coordination, and strategic management as key priorities for improving the performance of the Head of Studies.

Significant gaps in the training of the Head of Studies were identified, particularly in areas such as educational legislation, team management, and the development of strategic and pedagogical skills. This highlights the need for targeted, role-specific professional development programs to enhance their effectiveness and address the challenges associated with their responsibilities.

Limitations and Future Investigations

One limitation of this study lies in the limited representation of the Head of Studies in the Phase 1 quantitative analysis. Given that schools often have a single institutional email address, which is typically accessed by one person, it restricted the possibility of obtaining responses from all three members of the leadership team. This occurred despite clear instructions in the contact email emphasizing the importance of responses from all leadership roles. Additionally, while the qualitative phase provided valuable insights, there is room to explore the specific needs and challenges of the Head of Studies in greater depth, a focus that will be addressed in Phase 3 of the research. Finally, it would be valuable to replicate this study in other educational contexts to analyse how the findings may vary across different cultural and regulatory settings.

Appendices

Appendix 1. *The 62 functions identified in the exercise of leadership in educational organizations.*

D1: Institutional Leadership

- D1F1 Plans the school's goals.
- D1F2 Establishes the school's vision-mission.
- D1F3 Promotes an internal network of relationships.
- D1F4 Facilitates the establishment of a network with external entities.
- D1F5 Leads the school's educational project.
- D1F6 Promotes communication channels to encourage participation.
- D1F7 Tracks the progress of the school's leadership team.
- D1F8 Resolves internal team conflicts.
- D1F9 Provides suggestions on institutional planning.
- D1F10 Manages internal communications.
- D1F11 Establishes criteria for the budget project.

D2: Management of the Educational Organization

- D2F1 Plans school projects.
- D2F2 Implements school projects.
- D2F3 Evaluates school projects.
- D2F4 Analyses environmental opportunities.
- D2F5 Integrates contextual features into school projects.
- D2F6 Solves day-to-day contingencies.
- D2F7 Prepares academic schedules.
- D2F8 Organizes academic events.
- D2F9 Coordinates extracurricular activities.
- D2F10 Drafts the School's Organization and Functioning Rules (NOFC).
- D2F11 Coordinates school committees.
- D2F12 Coordinates teaching teams.
- D2F13 Establishes transparency and accountability channelond those established by law.
- D2F14 Manages the administrative system.
- D2F15 Drafts the school's Annual Report.
- D2F16 Develops proposals for teaching staff profiles for interim vacancies according to the school project.
- D2F17 Manages the interim staff selection process.
- D2F18 Guarantees the rights and duties of the school community members.
- D2F19 Distributes leadership functions among team members.
- D2F20 Coordinates the implementation of the General Annual Planning.
- D2F21 Evaluates the overall functioning of the school.
- D2F22 Ensures compliance with Occupational Risk Prevention.
- D2F23 Executes the school's emergency protocol.

D3: Management of Teaching and Learning Processes

- D3F1 Supervises the alignment of the school's methodology with the curriculum.
- D3F2 Drafts the General Annual Programming.
- D3F3 Promotes the development of the Educational Project of the School.
- D3F4 Drives measures to improve teaching and learning processes.
- D3F5 Leads educational practices.
- D3F6 Promotes evaluation models for improvement.
- D3F7 Analyzes evaluation results, proposing improvement measures.
- D3F8 Manages resources in accordance with the principles of an inclusive school.
- D3F9 Encourages peer collabora
- D3F10 Supervises decision-making regarding teaching and learning processes.
- D3F11 Manages changes related to teaching and learning methodologies.
- D3F12 Drafts the Tutorial Action Plan.
- D3F13 Promotes measures to address diversity.
- D3F14 Encourages actions to reduce inequalities.

D4: Promotion of Staff Development

- D4F1 Promotes staff professional development.
- D4F2 Promotes staff emotional development.
- D4F3 Facilitates group dynamics for professional exchange.
- D4F4 Encourages self-reflection on professional practice.
- D4F5 Encourages the update of professional skills according to the School's Educational Project (PEC).
- D4F6 Coordinates staff training activiti
- D4F7 Implements the welcome plan for new staff members.
- D4F8 Addresses individual staff needs.

D4F9 Promotes shared school responsibilities.

D4F10 Communicates the school's vision-mission.

D4F11 Ensures a positive school climate.

D4F12 Designs the induction program for new staff.

D4F13 Participates in staff evaluation processes.

D4F14 Assesses the capabilities, characteristics, and preferences of teaching staff for determining vacancy assignments.

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