

PRINCIPLES OF EDUCATIONAL
LEADERSHIP AND
MANAGEMENT

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THIRD EDITION

PRINCIPLES OF EDUCATIONAL
LEADERSHIP AND
MANAGEMENT

EDITED BY
TONY BUSH, LES BELL AND DAVID MIDDLEWOOD



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CONTENTS

<i>Preface</i>	vii
<i>About the Editors</i>	xiii
<i>About the Contributors</i>	xv
Part I Principles of Educational Leadership and Management	1
1 Models of Educational Leadership <i>Tony Bush</i>	3
2 Instructional Leadership 1950–2018: Transformation from an American to a Global Leadership Construct <i>Philip Hallinger</i>	19
3 An Ethics of Educational Leadership for Turbulent and Complex Times <i>Mike Bottery</i>	39
4 Solo and Shared Leadership <i>Megan Crawford</i>	57
5 Excellence in Educational Leadership: Practices, Capabilities and Virtues that Foster Improved Student Outcomes <i>Viviane Robinson</i>	73
Part II Leadership, Management and Professionalism	93
6 Leading and Managing Professional Learning <i>Les Bell</i>	95
7 Leading and Managing Professional Staff <i>David Middlewood</i>	117
8 Appraisal and Performance Management <i>David Middlewood</i>	133
9 Resource Management <i>Raj Mestry</i>	149

10 Leadership Preparation and Development <i>Tony Bush and Carmen Montecinos</i>	165
Part III Leadership for Social Justice	181
11 Gender and Educational Leadership <i>Pontso Moorosi</i>	183
12 Leadership for Diversity and Inclusion <i>Jacky Lumby</i>	205
13 Race and Ethnicity in Educational Leadership <i>Paul Miller</i>	223
14 The Participation and Influence of Stakeholders in School Leadership and Management <i>Michael Connolly, Catherine Farrell and Chris James</i>	239
15 Leading Schools in Challenging Circumstances <i>Alma Harris and Michelle Jones</i>	259
Part IV Leadership and Context	273
16 Leadership and Globalisation <i>Howard Stevenson</i>	275
17 Contextualising the Study and Practice of School Leadership in an Era of Globalisation <i>Philip Hallinger</i>	291
18 Leadership and Culture <i>Allan Walker and Qian Haiyan</i>	311
19 School Leadership in Developing Countries: The Case of South Africa <i>Felix Maringe and Nevensha Sing</i>	331
20 Educational Leadership in Post-Conflict Situations: A Brief <i>Reconnoitre</i> <i>Tom O'Donoghue and Simon Clarke</i>	357
<i>Author Index</i>	373
<i>Subject Index</i>	381

Part I

PRINCIPLES OF EDUCATIONAL LEADERSHIP AND MANAGEMENT



1

MODELS OF EDUCATIONAL LEADERSHIP

Tony Bush

Introduction: The Significance of Educational Leadership

It is widely recognised that leadership is second only to classroom teaching in its impact on student learning. Leithwood et al.'s (2006) widely cited report shows that 'leadership acts as a catalyst' (p.4) for beneficial effects, including pupil learning. Their conclusion, that 'there is not a single documented case of a school successfully turning around its pupil achievement trajectory in the absence of talented leadership', offers powerful support for the vital role of heads, senior and middle leaders in all types of school.

Definitions of Educational Leadership

Gunter (2004) shows that the labels used to define this field have changed from 'educational administration' to 'educational management' and, more recently, to 'educational leadership'. Bush (2008) discusses whether such changes are purely semantic or reflect substantive changes in the nature of the field. Yukl

(2002: 4) argues that ‘the definition of leadership is arbitrary and very subjective’, but the following ‘working definition’ includes its main features:

Leadership is a process of influence leading to the achievement of desired purposes. Successful leaders develop a vision for their schools based on their personal and professional values. They articulate this vision at every opportunity and influence their staff and other stakeholders to share the vision. The philosophy, structures and activities of the school are geared towards the achievement of this shared vision. (Bush & Glover, 2003: 5)

Three dimensions of leadership arise from this working definition.

Leadership as influence

Leadership involves a social influence process whereby intentional influence is exerted by one person [or group] over other people [or groups] to structure activities and relationships in a group or organisation (Yukl, 2002: 3). Bush (2008: 277) refers to three key aspects of these definitions. First, the central concept is influence rather than authority. Both are dimensions of power but the latter tends to reside in formal positions, such as principal or head teacher, while the former could be exercised by anyone in the school or college. Leadership is independent of positional authority while management is linked directly to it. Second, the process is intentional. The person seeking to exercise influence is doing so in order to achieve certain purposes. Third, influence may be exercised by groups as well as individuals. This notion provides support for the concept of distributed leadership and for constructs such as senior leadership teams.

Leadership and values

The notion of ‘influence’ is neutral in that it does not explain or recommend what goals or actions should be pursued. However, leadership is increasingly linked with values. Leaders are expected to ground their actions in clear personal and professional values. This implies that values are ‘chosen’ but Bush (2008: 277) argues that the dominant values are those of government and adds that these may be ‘imposed’ on school leaders. Teachers and leaders are more likely to be enthusiastic about change when they ‘own’ it. Hargreaves (2004), drawing on research in Canadian schools, finds that teachers report largely positive emotional experiences of self-initiated change but predominantly negative ones towards mandated change. There is a tension here between the obligation to implement the policies of democratically elected governments and the need for teacher professionals to feel positive about new initiatives if they are to enact them successfully.

Leadership and vision

Vision has been regarded as an essential component of effective leadership for more than 20 years. Southworth (1993: 23–4) suggests that heads are motivated to work hard ‘because their leadership is the pursuit of their individual visions’ (ibid.: 47). However, Thoonen et al. (2011: 520) refer to the ‘adverse effects’ of vision, which arise when principals do not involve teachers in the process of vision building.

The articulation of a clear vision has the potential to develop schools but the empirical evidence of its effectiveness remains mixed. A wider concern relates to whether school leaders, in England and elsewhere, are able to develop a specific vision for their schools, given government prescriptions of both curriculum aims and content. Many head teachers are like Bottery’s (2004: 164) ‘Alison’, who examines every issue in relation to the school’s Ofsted report. Hoyle and Wallace (2005: 139) add that visions have to conform to centralised expectations and to satisfy Ofsted inspectors.

A Typology for Leadership

There are many alternative, and competing, models of school leadership. In this section, I review seven of these theories, drawing on Leithwood, Jantzi and Steinbach (1999), Bush (2011), and Bush and Glover (2014).

Instructional leadership

The increasing emphasis on managing teaching and learning as the core activities of educational institutions has led to ‘instructional leadership’ being emphasised. Instructional leadership is the longest established concept linking leadership and learning. However, several other terms may be used to describe this relationship, including pedagogic leadership, curriculum leadership and leadership for learning. Despite its prominence and longevity, instructional leadership has been criticised on two grounds. First, it is perceived to be primarily concerned with teaching rather than learning (Bush, 2013). The second criticism is that it ‘focused too much on the principal as the centre of expertise, power and authority’ (Hallinger, 2003: 330). As a consequence, it tends to ignore or underplay the role of other leaders such as deputy principals, middle managers, leadership teams, and classroom teachers.

Hallinger and Heck (2010) note that, in the twenty-first century, instructional leadership has been ‘reincarnated’ as ‘leadership for learning’. This tends to stress shared or distributed leadership, counteracting the principal-centric approach of the instructional model. The second is a focus on learning, in

contrast to the teaching-centred dimension of instructional leadership. Robinson's (2007: 21) meta-analysis of published research shows that 'the closer leaders are to the core business of teaching and learning, the more likely they are to make a difference to students'. This indicates that instructional leadership effects are much greater than those of other leadership models, a view confirmed by Shatzer et al. (2013).

The recent emphasis on instructional leadership is based largely on practice in decentralised and partly decentralised contexts, where principals have substantial scope to decide how to lead and manage their schools (Bush & Glover, 2014). However, there is emerging evidence (e.g. Bush et al., 2018 in Malaysia; Gumus & Akcaoglu, 2013 in Turkey; Hallinger & Lee, 2014 in Thailand; and Kaparou & Bush, 2015 in Greece) that governments of centralised systems, which encourage or prescribe instructional leadership, may be disappointed, as principals are reluctant to move away from their traditional managerial approaches.

Instructional leadership is different to the other models in focusing on the direction rather than the process of leadership. It says little about the process by which instructional leadership is to be developed. It focuses on the 'what', rather than the 'how', of educational leadership. In this respect, it is limited and partial, and has to be considered alongside other models.

Managerial leadership

Managerial leadership assumes that the focus of leaders ought to be on functions, tasks and behaviours and that, if these functions are carried out competently, the work of others in the organisation will be facilitated. Most approaches to managerial leadership also assume that the behaviour of organisational members is largely rational. Influence accrues largely because of the formal authority of leaders and Leithwood, Jantzi and Steinbach (1999) argue that influence is allocated in proportion to the status of those positions in the organisational hierarchy, suggesting the primacy of positional leadership. 'Positional power, in combination with formal policies and procedures, is the source of influence exercised by managerial leadership' (ibid.: 17). Hoyle and Wallace (2005: 68) note the relationship between managerial leadership and leadership for learning: 'Management functions to support learning and teaching, the core of the educational enterprise'.

Managerialism

The shift in the language of school organisation to favour 'leadership' at the expense of 'management' is partly semantic, as noted above, but also reflects anxiety about the dangers of value-free management, focusing on efficiency for

its own sake, what Hoyle and Wallace (2005: 68) describe as ‘management to excess’:

Effective leadership and management ‘take the strain’ by creating structures and processes which allow teachers to engage as fully as possible in their key task. Managerialism, on the other hand, is leadership and management to excess. It transcends the support role of leadership and, in its extreme manifestation, becomes an end in itself.

Managerial leadership is the model which provides the greatest risk of a bureaucratic approach to school organisation. By focusing on functions, tasks and behaviours, there is the possibility that the aims of education will be subordinated to the managerial aim of greater efficiency. Simkins (2005: 14) claims that managerialist values, such as rigid planning and target-setting regimes, are being set against traditional professional values.

Managerial leadership has been discredited and dismissed as limited and technicist, but it is an essential component of successful leadership, ensuring the implementation of the school’s vision and strategy. Management without vision is rightly criticised as ‘managerialist’ but vision without effective implementation is bound to lead to frustration. In centralised contexts, it is the most appropriate way of conceptualising leadership because the principal’s role often remains that of implementing external imperatives with little scope for local initiative. This is evident in many African countries, including Nigeria (Imoni, 2018), and in much of Eastern and Southern Europe, including Greece (Kaparou & Bush, 2015). Even in decentralised systems, however, effective implementation of initiatives, whether externally or internally generated, remains important. Managerial leadership is a vital part of the armoury of any successful principal.

Transformational leadership

Transformational leadership is based on the assumption that higher levels of personal commitment to organisational goals, and greater capacities for accomplishing those goals, are assumed to result in extra effort and greater productivity (Leithwood et al., 1999: 9). Transformational leadership is often contrasted with transactional approaches (e.g. Miller & Miller, 2001). The latter relates to relationships between leaders and teachers being based on exchange of valued resources. In its simplest form, teachers provide educational services (teaching, pupil welfare, extracurricular activities) in exchange for salaries and other rewards. This is a basic approach and does not lead to the level of commitment associated with the transformational model.

Shatzer et al.’s (2014) research with 590 elementary school teachers in the USA showed that transformational leadership had positive effects on student

achievement but that these were less pronounced than those arising from instructional leadership. Research in the United Arab Emirates (Litz & Scott, 2016) indicated variation in perceptions between teachers and principals about whether principals were practising transformational leadership. They attribute such differences to cultural factors, and question the suitability of adopting this western model in an Islamic society without cultural adaptation.

The transformational model is comprehensive in that it provides a normative approach to school leadership which focuses primarily on the process by which leaders seek to influence school outcomes rather than on the nature or direction of those outcomes. However, it may also be criticised as being a vehicle for control over teachers, through requiring adherence to the leader's values.

The contemporary policy climate within which schools have to operate also raises questions about the validity of the transformational model, despite its popularity in the literature. Transformational language is used by governments to encourage, or require, practitioners to adopt and implement centrally determined policies. In South Africa, for example, the language of transformation is used to underpin a non-racist post-Apartheid education system. The policy is rich in symbolism but weak in practice because many school principals lack the capacity and the authority to implement change effectively (Bush & Glover, 2014; Bush et al., 2009). The English system may be seen to require school leaders to adhere to government policies, which affect aims, curriculum content and pedagogy, as well as values. In this respect, transformation may be a unilateral process of implementation, not a context-specific assessment of the needs of individual schools and their communities. When 'transformation' is a cloak for imposing the leader's values, or for implementing the prescriptions of the government, then the process is political rather than genuinely transformational (Bush, 2011: 86). 'The strongest advocacy of a transformational approach to reform has come from those whose policies ensure that the opportunity for transformation is in fact denied to people working in schools' (Hoyle & Wallace, 2005: 128).

Transformational leadership remains popular as it accords closely with the emphasis on vision as the central dimension of leadership. Successful leaders are expected to engage with staff and other stakeholders to produce higher levels of commitment to achieving the goals of the organisation which, in turn, are linked to the vision. There is evidence to suggest that transformational leadership is effective in improving student outcomes (Shatzer et al., 2014) but this model also has two major limitations. First, it may be used as a vehicle for the manipulation or control of teachers who are required to support the 'vision' and aims of the leader. Second, the language of transformation may be used to secure the implementation of centrally determined policies, not the identification of school-level vision and goals.

Moral and authentic leadership

The moral leadership model differs from the transformational approach through its emphasis on integrity. It assumes that the critical focus of leadership ought to be on the values, beliefs and ethics of leaders themselves (Leithwood et al., 1999). Several other terms have also been used to describe values-based leadership. These include ethical leadership (Stefkovich & Begley, 2007; Starratt, 2005), authentic leadership (Begley, 2007), and spiritual leadership (G. Woods, 2007).

West-Burnham (1997: 239) discusses two approaches to leadership which may be categorised as ‘moral’. The first he describes as ‘spiritual’ and relates to ‘the recognition that many leaders possess what might be called “higher order” perspectives’, perhaps represented by a particular religious affiliation. Such leaders have a set of principles which provide the basis of self-awareness. G. Woods’s (2007: 148) survey of headteachers in England found that 52 per cent ‘were inspired or supported in their leadership by some kind of spiritual power’. West-Burnham’s (1997: 241) second category is ‘moral confidence’, the capacity to act in a way that is consistent with an ethical system and is consistent over time. Keddie’s (2016) research in Queensland, Australia, points to the enduring significance of moral leadership despite the regimes of accountability and competition that can compromise student equity and delimit schooling purposes.

The concept of authentic leadership has grown in significance but essentially covers similar ground to that of moral leadership. Begley (2007: 163) defines it as ‘a metaphor for professionally effective, ethically sound and consciously reflective practices’. P. Woods (2007: 295) adds that it is ‘essentially about the conduct and character of the individual leader’.

Moral and authentic leadership are values-based models. Leaders are expected to behave with integrity, and to develop and support goals underpinned by explicit values. Such leadership may be found in faith schools, where the values are essentially spiritual, or may be a product of the leader’s own background and experience. The main difficulty arises when staff or stakeholders do not support the values of leaders. This is likely to be uncomfortable for the people concerned and may lead to dissonance within the school.

Distributed leadership

The models discussed above are essentially about individual (usually principal) leadership. However, there have been several approaches which seek to widen the debate to include shared approaches to leadership. Crawford (2012) notes the shift from solo to shared leadership. She attributes this, in part, to well documented failures of high profile ‘superheads’ in England, leading to scepticism about individual, or ‘heroic’, leadership.

Collegial and participative leadership were popular shared approaches in the late 1980s and 1990s but distributed leadership has become the normatively preferred leadership model in the twenty-first century. Harris (2010: 55) notes that it 'represents one of the most influential ideas to emerge in the field of educational leadership in the past decade'.

An important starting point for understanding distributed leadership is to uncouple it from positional authority. As Harris (2004: 13) indicates, 'distributed leadership concentrates on engaging expertise wherever it exists within the organization rather than seeking this only through formal position or role'. Gronn (2010: 70) refers to a normative switch 'from heroics to distribution' but also cautions against a view that distributed leadership necessarily means any reduction in the scope of the principal's role. Indeed, Hartley (2010: 271) argues that 'its popularity may be pragmatic: to ease the burden of overworked head-teachers'. Lumby (2009: 320) adds that distributed leadership 'does not imply that school staff are necessarily enacting leadership any differently' to the time 'when heroic, individual leadership was the focus of attention'.

Bennett et al. (2003: 3) claim that distributed leadership is an emergent property of a group or network of individuals in which group members pool their expertise. However, given that leadership is widely regarded as an influence process, a central issue is 'who can exert influence over colleagues and in what domains?' (Harris, 2005: 165). Heads and principals retain much of the formal authority in schools, leading Hartley (2010: 82) to conclude that 'distributed leadership resides uneasily within the formal bureaucracy of schools'. However, the emphasis on 'informal sources of influence' (Harris 2010: 56) suggests that distributed leadership may also thrive if there is a void in the formal leadership of the organisation.

Harris (2004: 16) argues that 'successful heads recognize the limitations of a singular leadership approach' and adopt a form of leadership 'distributed through collaborative and joint working'. However, Bottery (2004: 21) asks how distribution is to be achieved 'if those in formal positions do not wish to have their power redistributed in this way?' Harris (2005: 167) argues that 'distributed and hierarchical forms of leadership are not incompatible' but it is evident that distribution can work successfully only if formal leaders allow it to take root.

While leadership distribution is generally regarded as 'emergent' (Bennett et al., 2003), a modified version has developed in centralised systems where school leaders invite, or require, teachers and other staff to fulfil certain roles, or to carry out certain tasks. This leads to the notion of 'allocative distributed leadership' (Bolden et al., 2009) evident, for example, in Malaysia (Norwawi, 2018) and in Nigeria (Imoni, 2018). This concept is very similar to delegation and may be regarded as more related to managerial, than to distributed, leadership. Similarly, Holloway, Nielsen and Saltmarsh (2017), in the USA, and Mifsud (2017), in Malta, point to the problems inherent in 'prescribed', or 'directed' distribution.

The interest in, and support for, distributed leadership is based on the assumption that it will bring about beneficial effects that would not occur with singular leadership. Leithwood et al.'s (2006) important English study shows that multiple leadership is much more effective than solo approaches. They add that schools with the highest levels of student achievement attributed this to relatively high levels of influence from all sources of leadership. Hallinger and Heck (2010) also found that distributed leadership was significantly related to change in academic capacity and, thus, to growth in student learning.

The existing authority structure in schools and colleges provides a potential barrier to the successful introduction and implementation of distributed leadership. 'There are inherent threats to status and the status quo in all that distributed leadership implies' (Harris, 2004: 20). Fitzgerald and Gunter (2008) refer to the residual significance of authority and hierarchy, and note the 'dark side' of distributed leadership, managerialism in a new guise. It can also be argued that distributed leadership leads to the power relationship between followers and leaders becoming blurred (Law, 2010). Lumby (2013) also links distributed leadership to power, claiming that little attention is given to the implications of the former for power relations in education.

These reservations suggest that an appropriate climate is an essential precondition to meaningful distributed leadership. Harris (2005: 169) argues that 'the creation of collegial norms' are essential and adds that teachers need time to meet if collective leadership is to become a reality. Despite these reservations, however, the research does show that distributed leadership has the potential to expand the scope of leadership, leading to enhanced student outcomes.

Distributed leadership provides the most significant contemporary example of the nature of theory in educational leadership. To what extent is theory a representation of practice (description), and to what extent does it constitute advocacy; a normative perspective? Lumby (2013) comments that discussion of distributed leadership as a heuristic tool gave way to an evangelical approach, for example in NCSL publications. This may explain, in part, the frequent references to distributed leadership by participants in a study of senior leadership teams at schools rated as 'outstanding' by Ofsted (Bush & Glover, 2012). Unprompted, these leaders attributed their perceived success to adopting distributed approaches. Distributed leadership is popular, in part, because it accords with the notion that values should be shared by teacher professionals and other adults in the school. Difficulties arise when the assumption of shared values is contradicted by the reality of conflicting values.

Distributed leadership has become the normatively preferred leadership model in the twenty-first century. Harris (2010) argues that it is one of the most influential ideas to emerge in the field of educational leadership. It can be differentiated from several other models by its focus on collective, rather than

singular, leadership. Leithwood et al.'s (2006) important study of the impact of school leadership led to an evidence-based claim that leadership has a greater influence on schools and students when it is widely distributed. This finding supports the common-sense view that enhancing leadership capacity in this way is likely to be more effective than relying only on singular leadership. Gronn's (2010) 'hybrid' model of leadership may offer the potential to harness the best of both individual and distributed approaches.

Teacher leadership

Wenner and Campbell (2017) characterise teacher leadership as the teacher role beyond the classroom, supporting the professional learning of peers, and targeting student learning. Grant's (2006) model extends this view to develop a four-part model of teacher leadership:

- Within the classroom
- Working with other teachers
- As part of whole-school development
- As an extension beyond the school

Muijs and Harris's (2007) research in three UK schools shows that teacher leadership is characterised by a variety of formal and informal groupings. 'Teacher leadership was seen to empower teachers, and contributed to school improvement through this empowerment and the spreading of good practice and initiatives generated by teachers'. (Muijs and Harris 2007: 126)

Stevenson (2012) argues that the interpretation of teacher leadership is managerialist in nature and inherently conservative. Helderbrant (2010: 363) notes that teacher leadership 'remains largely an academic topic and, even though inroads have been made, teacher leadership remains more a concept than an actuality'. Muijs and Harris (2007: 126) conclude that 'teacher leadership requires active steps to be taken to constitute leadership teams and provide teachers with leadership roles. A culture of trust and collaboration is essential, as is a shared vision of where the school needs to go, clear line management structures and strong leadership development programmes'.

Teacher leadership is often linked to distributed leadership. A key distinction can be made between teachers' classroom leadership, which may involve other adults, and their wider school role. Promoting teacher leadership provides greater leadership capacity and capability, and also offers the prospect of a 'ready-made' cohort when middle and senior leadership positions become available. Teacher leadership is more likely to succeed where it is fostered and nurtured by heads and senior leaders.

Contingent leadership

The models of leadership examined above are all partial. They provide valid and helpful insights into one particular aspect of leadership. None of these models provide a complete picture of school leadership. The contingent model provides an alternative approach, recognising the diverse nature of school contexts, and the advantages of adapting leadership styles to the particular situation, rather than adopting a 'one size fits all' stance (Bush & Glover, 2014). 'There are wide variations in the contexts for leadership and ... these contexts require different leadership responses' (Leithwood et al., 1999: 15).

Leadership requires effective diagnosis of problems, followed by adopting the most appropriate response to the issue or situation (Morgan, 1997). This reflexive approach is particularly important in periods of turbulence when leaders need to be able to assess the situation carefully and react as appropriate rather than relying on a standard leadership model. A contingent approach also helps to counter the normative features of many leadership models and responds to the tendency to advocate one 'right' approach to school leadership. By recognising that a range of approaches can be valid, it provides a more complete picture of leadership practice. The contingent model is pragmatic and is not underpinned by a clear set of values.

Contingent leadership acknowledges the diverse nature of school contexts, and the advantages of adapting leadership styles to the particular situation, rather than adopting a 'one size fits all' stance. The educational context is too complex and unpredictable for a single leadership approach to be adopted for all events and issues. Contingent leadership, then, is not a single model but represents a mode of responsiveness which requires effective diagnosis followed by careful selection of the most appropriate leadership style. It is pragmatic, rather than principled, and can be criticised for having no overt sense of the 'big picture'.

Conclusion: Understanding and Applying Leadership Theory

The concept of management has been joined, or superseded, by the language of leadership but the activities undertaken by principals and senior staff resist such labels. Successful leaders are increasingly focused on learning, the central and unique purpose of educational organisations. They also face unprecedented accountability pressures in many countries in what is clearly an increasingly 'results driven' business. As these environmental pressures intensify, leaders and managers require greater understanding, skill and resilience to sustain their institutions. Heads, principals and senior staff need an appreciation of the theory, as well as the practice, of educational management (Bush & Glover, 2014).

Theory is one of the four essential building blocks of school leadership. Alongside policy, research and practice, it provides helpful insights into how schools are led and managed. The theory of leadership is important for two main reasons. First, it provides a way of understanding and interpreting the actions of leaders. The models outlined in this chapter provide lenses to view, and to comprehend, the ways in which leadership is enacted in schools. Second, understanding theory provides a guide to leadership practice for principals and other leaders. It widens horizons and avoids drawing only on the inevitably limited individual or collective experience of any school's leaders.

Each of the leadership models discussed in this paper is partial. They provide distinct but uni-dimensional perspectives on school leadership. They are also artificial distinctions, or 'ideal types', in that most successful leaders are likely to embody most or all of these approaches in their work. For example, heads may aspire to develop distributed instructional leadership. We noted earlier that leadership theory is subject to fashion and that models increase and decrease in perceived importance over time. The reasons for such changes are not always apparent.

Recent evidence in England (Leithwood et al., 2006), and internationally (Robinson, 2007), provides powerful empirical support for the widely accepted view that the quality of leadership is a critical variable in securing positive school and learner outcomes. Leadership is second only to classroom teaching in its potential to generate school improvement. However, much less is known about how leaders impact on outcomes. While 'quick fix' solutions to school under-performance, often involving strong managerial leadership, can produce short-term improvement, sustainable progress is much harder to achieve.

The leadership typology discussed in this paper provides many clues for heads, senior and middle leaders, and senior leadership teams. Managerial leadership, operating through the hierarchy, can mandate clearly targeted change, such as a stronger focus on examination and test scores. However, this often depends on a single leader and may not lead to sustainable change. Transformational leadership approaches aim to widen commitment to school-wide objectives, through the development of shared vision, but the 'vision' is often that of the head or principal with acquiescence, rather than genuine commitment, from teachers and other staff.

The limitations of the hierarchy have led to a plethora of alternative models, including distributed and teacher leadership, which are all designed to broaden leadership and to stress lateral as well as vertical relationships. These are often manifested in team-based structures. Bush and Glover's (2012) study of high performing senior leadership teams shows their value in providing coherence and leadership 'density'. Departmental and key-stage teams have the same potential to widen leadership participation but there is little evidence about the most effective way to develop and sustain such teams.

While there are different approaches to leadership and management, a focus on leadership for learning, or 'instructional leadership', is an essential element for successful schooling. It is likely to be more effective if it is a widely shared function; 'distributed instructional leadership'. The nine successful schools featured in Bush and Glover's (2012) research on English senior leadership teams all had a shared focus on high quality teaching and learning. Contingent leadership suggests that a flexible approach is required but attention to leadership for learning is a key element of successful schooling.

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