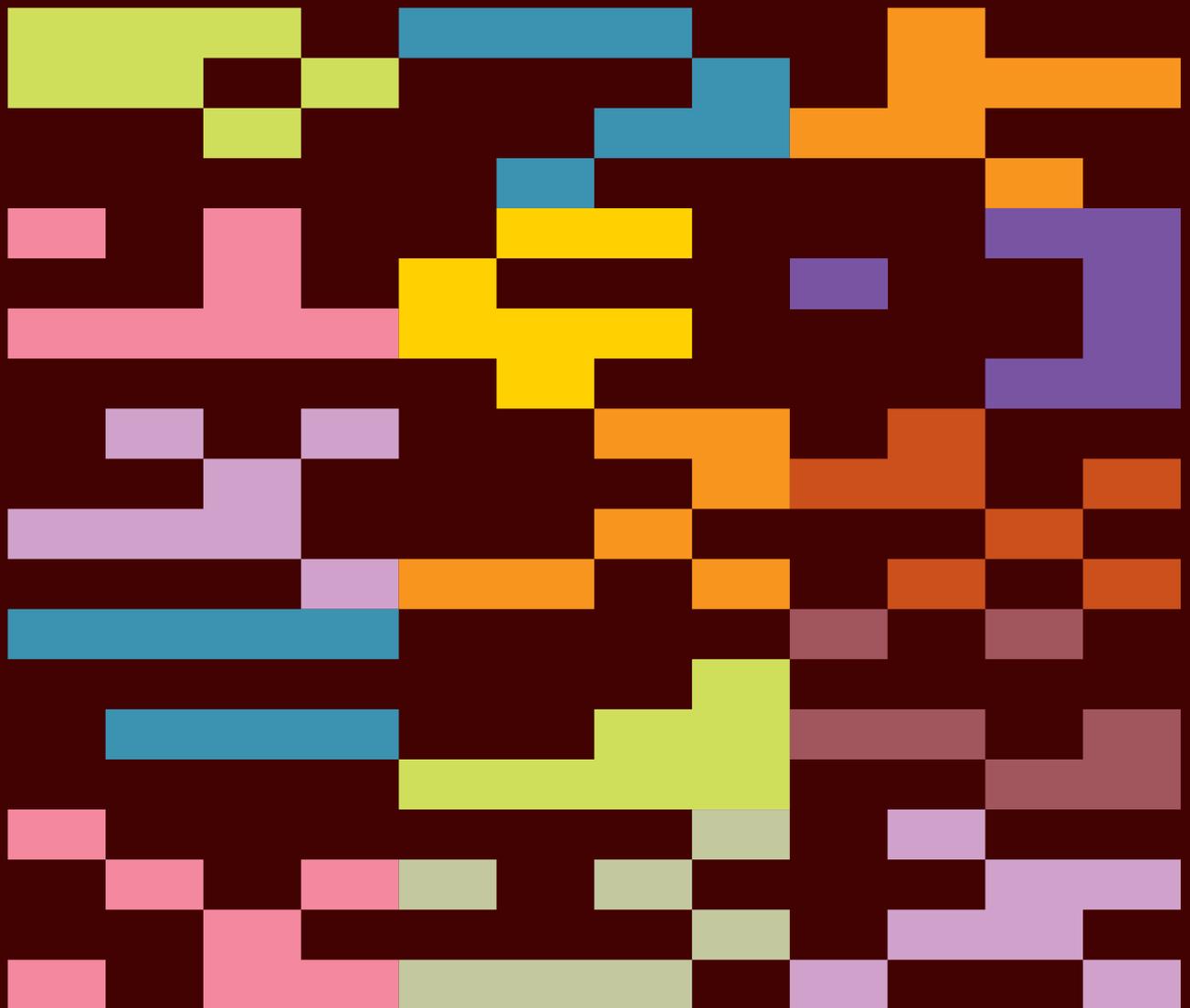


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Inspiring leaders;
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→ A life in the day of a headteacher

A study of practice and well-being



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Executive summary

This is a report of a study of the nature of the working lives and practices of contemporary headteachers in England conducted by the National College for School Leadership (NCSL).

At NCSL's regional conferences in 2005, many headteachers cited relentlessness, accountability and complexity of headship as some of the major issues facing the profession. Underlying these issues, this study specifically explores the concepts of well-being, work–life balance, stress and job satisfaction. The following definitions of these concepts were used to inform the design of the study:

- well-being: *'... positive well-being ... is ... something that is more than simply the absence of stress or illness, but rather involves positive enjoyment and pleasure'*

Gambles et al, 2006 p 37

- work–life balance: *'... simply describes **any** set of policies and practices that employers can put in place, which help people achieve better balance between work and their lives outside work and benefits the business'*

Department of Trade and Industry, 2006

- stress: *'teacher stress may be defined as the experience by the teacher of unpleasant, negative emotions, such as anger, anxiety, tension, frustration or depression, resulting from some aspect of their work as a teacher'*

Kyriacou, 2001 p 28

- job satisfaction: *'... the positive emotional reactions and attitudes an individual has towards their job'*

Faragher et al, 2005 p 106

There is a limited amount of research literature that focuses on these issues specifically in relation to headship. Previous research has tended to focus on the teaching profession in general. However, limited previous work has included a study of stress in UK heads (Cooper & Kelly, 1993), stress and job satisfaction among primary heads (Chaplain, 2001) and work–life balance in headship (Daniels & French, 2006). Nevertheless, the review of literature highlighted particular issues around contemporary headship and well-being. Amongst others, the constant flow of new initiatives together with an increasing emphasis on output measures has affected the role and remit of headteachers

profoundly. Driven by changes of policy and emphasis, the tasks that headteachers are expected to undertake have changed significantly in recent years, with their work increasingly being perceived as pressured. The well-being of headteachers is affected by the operational and strategic working environment and the ethos and morale within the education system, as well as opportunities to undertake professional development.

In light of the lack of research and the fact that there have been significant changes to the role since much of the previous work was conducted, this study serves to provide timely evidence on contemporary practice and the outlined underlying issues.

The study involved 34 practising headteachers, both novice and experienced from all phases and government regions. The study used a three-stage methodology to gather data upon their working lives: a journal of headship completed over the course of two weeks; a non-participant observation of a working day; and a follow-up interview. Research tools for each of these were constructed with the help of subject matter experts, who advised on the design and content. The fieldwork was carried out between May and August 2006. Data was analysed with the use of Excel and NVivo software.

Content analysis of the participants' journals identified 54 distinct areas of activity. These were grouped into eight meta-categories covering: *strategic leadership, management, administration, external stakeholders, internal stakeholders, continuous professional development, personal issues* and *various unspecified tasks*. An analysis of the time spent on these activities revealed that participants in this study spent almost a quarter of their time undertaking administrative tasks. Meeting the demands of external stakeholders was the second most time-consuming activity. Management-based activities, in particular management of staff, was the third highest category in terms of time spent.

Descriptions of the working life of participants were based on the journals and additional data provided by shadowing and interviewing participants. These descriptions showed that participants' working lives are demanding and pressured, with a fast pace and involving long hours. The variety of their work was also evident, with participants needing to be flexible and responsive to unexpected challenges. Indeed, half of the participants in this study highlighted the fact that there was no such thing as a typical day. Other noteworthy aspects of their

working lives included personal relationships, in particular responding to the needs of others, conducting managerial tasks and engaging in leadership.

When asked what they would change about headship, participants identified accountability, bureaucracy and external demands. Additionally, increased capacity, more professional development opportunities and challenging the culture of headship were also cited.

The findings illustrate that developing others, in particular seeing children progress, develop and succeed, was one of the most rewarding and satisfying aspects of their job. Other rewarding aspects of their job included leading the strategic direction of the school and positive personal relationships. The least rewarding and satisfying elements of headship included dealing with negative staff and parent issues, and excessive bureaucracy.

Participants detailed a number of coping strategies. These included a variety of hobbies, support from family and friends, strategies for managing work, and personal philosophy: all of these contributed to a positive work–life balance. In contrast, pressure of work demands, a lack of opportunities for delegation, and negative staff and parental issues hindered the achievement of a positive work–life balance.

To improve work–life balance, participants suggested the need for increased levels of administrative support, greater distribution of leadership and a reduction in dependency on the headteacher, amongst others.

The study reveals much about the practice of headteachers and offers suggestions from heads themselves about the future of their role.

It is evident from this study that, for some, it is the best job that they could carry out – indeed, some look upon it as a vocation. Notwithstanding this, the current study offers an insight to the various perceptions, positive and negative, of the role that exist in today’s population of headteachers. An illustration of this variety and, in some instances, polarisation is that, for some participants, the least rewarding and most challenging aspects of their work – the variety, complexity and accountability – are the very things which others find most rewarding. The findings also demonstrate that, for some participants, a healthy work–life balance is achievable, whilst for others it is not, despite similar demands, workloads and pressures.

The majority of those who detailed that they relish the challenges and enjoy the variety of the role, and achieve a positive work–life balance, were more often those who had effectively *distributed leadership* across and within the school, who could *prioritise their personal and professional lives*, could *deal confidently and comfortably with negative staff, parent and pupil issues*, who fostered and were part of *supportive networks or collaboratives* and who had a *positive and active life outside school*. These strategies offer us insights and implications for stakeholders into how and why some headteachers manage to achieve a work–life balance, and find satisfaction and reward in their role.

Conducting this study has reinforced the urgent need for further empirical research into the ways in which contemporary headteachers carry out their role. This would allow thorough exploration and understanding of the specific and complex relationships between well-being, stress, job satisfaction and work–life balance.

➔ 1. Introduction

This is a report of a study of the nature of the working lives and practices of contemporary headteachers in England conducted by the National College for School Leadership (NCSL).

At NCSL's regional conferences in 2005, many headteachers cited relentlessness, accountability and complexity of headship as some of the major issues facing the profession. This study specifically explores the concepts underlying these issues: well-being, work–life balance, stress and job satisfaction. The following definitions of these concepts were used to inform the design of the study:

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Department of Trade and Industry, 2006

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profoundly. Driven by changes of policy and emphasis, the tasks that headteachers are expected to undertake have changed significantly in recent years, with their work increasingly being perceived as pressured. The well-being of headteachers is affected by the operational and strategic working environment and the ethos and morale within the education system, as well as opportunities to undertake professional development.

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This report details the findings of the work, implications for stakeholders, suggestions for further research and outlines the design of a second-stage follow-up study.

→ 2. Literature review

2.1 Introduction

This literature review summarises what is already known about issues of well-being, job satisfaction, stress and work–life balance in the professional lives of contemporary headteachers in England. It is not intended that this review should cover the vast body of material and evidence that has been gathered pertaining to these issues in relation to the teaching profession as a whole or beyond. Although the wider context will be explored in summary form, the focus of the review is the lives of headteachers specifically in relation to the issues addressed here.

This review begins with a consideration of school leadership in relation to key policy changes (section 2.2) before providing a brief overview of well-being, job satisfaction and stress beyond the teaching profession (section 2.3). A multilevelled and multifaceted picture of well-being is presented in section 2.4. Features of headship that contribute significantly to job satisfaction and that can be developed to increase it are also considered here. Finally, the review moves on to work–life balance in section 2.5 and then considers implications for professional development and future research before bringing together conclusions (section 2.6).

The research literature in relation to the above issues and focusing specifically on headship is sparse. Therefore, a search of more general research was conducted in order to place what is known about the situation of headteachers within a general picture of well-being, job satisfaction, stress, and work–life balance in other occupations. For this, the following list of keywords was compiled as a basis for the literature search:

- headteachers
- non-school leaders
- workload
- well-being
- work–life balance
- stress
- job satisfaction

It was anticipated that most of the relevant literature pertaining specifically to headteachers would be recent, arising from interest stimulated over the last decade. However, it was also decided that, because of the existence of research into the situation of classroom teachers particularly from 1990 onwards, and the changes in headteachers' roles described and analysed since the passing of the Education Reform Act 1988 (ERA)¹ and the introduction of local management of schools (LMS) in 1990 (subsequently revised in 1996²), sources dating from 1990 onwards would be included.

2.2 School leadership and key policy changes: complexity and accountability issues

As Day et al (2003) have identified, beginning in 1988 with the ERA, schools have become subject to an increasing number of imposed curriculum and management innovations and quality control. As a result headteachers have found their working lives characterised by paradoxes as follows:

- *an apparent increase in independence in the management of schools alongside increasing dependence upon curriculum, monitoring, assessment and inspection frameworks imposed by government*
- *a performance- and results-driven orientation that has the potential to create divisiveness*
- *new forms of accountability which are intended to enhance effectiveness, but which simultaneously increase workload and bureaucracy*
- *new imposed curriculum certainties which reduce teachers' abilities to recognise and act upon differentiated student need*
- *increased attention to cognitive challenges that reduces attention to emotional need*

Day et al, 2003 pp 13–14

Research in primary schools has shown that the tasks that headteachers are expected to undertake have changed significantly in recent years (Southworth, 1995) with their work increasingly being perceived as pressurised. The sources of these pressures have been explored. According to Chaplain (2001), they are deemed to have arisen 'from a variety of sources including changes to legislation, relationships with key

¹www.opsi.gov.uk/acts/acts1988/Ukpga_19880040_en_1.htm

²www.archive.official-documents.co.uk/document/dfee/sfgs/selfgov.htm

stakeholders in education (including parents and governors) and increases in the management (as compared with *teacher*) role' (p 197). These changes of policy and emphasis have inevitably changed the feelings of headteachers towards their role, as well as the outcomes that they accept as falling within their remit.

A global dimension is added to this debate in the papers collated as a special issue of *Cambridge Journal of Education* in November 2003, edited by Professor John MacBeath (MacBeath, 2003). Entitled *The Changing World of Leadership*, the consequent pressures on school leaders from perspectives located in a wide variety of contexts are examined in some detail. The set of papers explores the dilemmas which are 'seen to be exacerbated in changing and hyper-complex societies' (p 323) ranging across Hong Kong, Ghana, Australia, North America, Scandinavia, Austria, Germany and Switzerland as well as the UK. The authors present arguments centring on the challenges posed in these specific contexts and cultures. MacBeath's editorial identifies the striking similarities that run through their analyses and, despite the apparent wide dissimilarities of context, emphasises the greater potential in 'the sharing of dilemmas rather than exchanging putative solutions' (p 325). A greater appreciation of the specific challenges posed in a range of cultural situations may enable us to develop a deeper understanding of the roles of leaders and the nature of leadership.

In their classification of six models of leadership – *instructional, transformational, moral, participative, managerial* and *contingent* – Leithwood et al (1999) underline how these apparently different approaches overlap but also have specific histories and profiles:

- *Each developed in a context of organisational and broader social goals, needs, norms, ideas and expectations, which allowed one or several approaches to dominate as an ideal, until such time as that context changed sufficiently as to more clearly favour yet another approach or approaches.*

Leithwood et al, 1999 p 17

This review now details previous research about the working lives of headteachers with specific reference to well-being, job satisfaction, stress and work–life balance.

2.3 Well-being, job satisfaction, stress and work–life balance beyond teaching

It must be acknowledged that the difficulty in recruiting and retaining people for leadership roles is not confined to the teaching profession (Hartle and Thomas, 2003). Nor is this shortage restricted to the UK. Similar issues are present in the USA, Canada and Australia. The demographic timebomb of the generation born in the late 1940s and 1950s, linked to the failure to offer a range of experience and develop leadership skills in younger colleagues earlier in their careers, has created what is increasingly seen as a shortage throughout all sectors.

Although this study is not concerned to describe or analyse the situation with regard to occupations other than headship, it is nevertheless pertinent to indicate some comparisons between the issues and factors affecting headteachers and those in other occupations.

2.3.1 Johnson et al (2005) – work-related stress across occupations

A recent illuminating study is that by Johnson et al (2005), which reports the rank order of 26 different occupations by stress and job satisfaction levels, including headteachers, teachers and teaching assistants. Using the outcomes from the completion of ASSET, a shortened stress evaluation tool licensed by occupational psychologists Robertson Cooper Limited (www.robertsoncooper.com/products/Asset.aspx), the authors detail the results in relation to key factors of physical health, psychological well-being and job satisfaction. Correlation of these factors revealed significant relationships between them, ie it was demonstrated that as physical health deteriorates, so does psychological well-being, followed by a decrease in job satisfaction.

Acknowledging the research evidence that supports the general recognition of teaching as a stressful occupation (Moriarty et al, 2001), Johnson et al draw attention to the differences between the ranking of 295 headteachers, 916 teachers and 444 teaching assistants with regard to each of the 3 key factors. The ASSET scores reveal that:

- ... *teachers are experiencing higher stress levels and lower job satisfaction levels than both headteachers and teaching assistants, neither of whom score above the norm on any of the factors.*

Johnson et al, 2005 pp 184–5

The rankings of headteachers, teachers and teaching assistants out of the 26 occupations for the 3 examined factors are shown in table 1.

Table 1: Rankings of headteachers, teachers and teaching assistants out of 26 occupations by physical health, psychological well-being and job satisfaction

	Physical health	Psychological well-being	Job satisfaction
Headteachers	11	20	17
Teachers	2	2	6
Teaching assistants	10	23	18

Source: Johnson et al, 2005 p 184

Interestingly, this pattern is also evident in the relative scores of police officers and senior police officers. In both cases, the authors draw attention to the impact of the more intense ‘emotional labour’ (Zapf et al, 1999; Zapf, 2002) of both teachers and police officers as opposed to headteachers and senior police officers. In fact, the six occupations reported as being the most stressful regarding physical and psychological well-being and as having the lowest levels of job satisfaction – namely *ambulance personnel, teachers, social services, customer services, call centres, prison officers* and *police* – all require ‘either face to face or voice to voice interaction with clients and in each of these occupations the emotions that the employees are required to display as part of their job have to follow strict rules’ (Johnson et al, 2005 p 184). Johnson et al therefore conclude that emotional labour contributes significantly to occupational stress but that more in-depth analysis of the interaction between stressors and stress outcomes is needed.

However, this research would seem to indicate that, in terms of job satisfaction and stress, headteachers experience more job satisfaction and less stress than those who work entirely in classrooms. The authors are at pains to point out the need for further in-depth research to investigate the interrelationships and underlying causes of the different levels of these factors perceived by those employed across a wide range of occupations. The ASSET database arising from completion of the evaluation tool by more than 25,000 personnel is being interrogated

and analysed further to reveal insights and answers to the questions raised so far.

In contrast to the outcomes of the Johnson et al (2005) study, the findings of the comparison of the two surveys carried out by Daniels and French (2006), arising from the concerns over the workloads of UK school leaders, indicate that:

- ... it is almost universally the case that problems of controlling workloads and securing a work–life balance are far greater for head, deputy head and assistant headteachers. The most concerning aspects of the findings are that [National Association of Head Teachers] (NAHT) members have to deal with heightened levels of red tape and have problems in planning and controlling their workloads or even identifying where, and with whom, there is scope for negotiation over workloads.

Daniels and French, 2006 p 3

There are also concerns over the issue of gender in terms of reactions to and dealing with occupational stress. The impact on female headteachers would seem to be significant in terms of the findings of both Cooper and Kelly (1993) and Chaplain (2001). Fotinatos and Cooper (2004) identify 'significant differences in terms of physical and psychological well-being amongst the male and female sample' (p 14) of 2,500 subjects. In her study of gender and headship in the 21st century, Coleman (2005) includes information on the differences between male and female home and family responsibilities that impact strongly on the issue of work–life balance. Such differences between male and female headteacher responsibilities, attitudes and expectations feed into the perceptions of self-efficacy, as well as affecting recourse to palliative strategies in coping with issues of job satisfaction. They therefore require further investigation.

2.4. Well-being

In this section of the review, a general consideration of well-being, together with explicit detail of the well-being of teachers, is used in the absence of any specific literature to raise issues about the well-being of headteachers. The research report *Enchanted Headteachers: Sustainability in primary school headship* (Woods, 2002) is used to illustrate issues surrounding well-being and to consider ways in which it might be promoted within the context of headship.

2.4.1 What is meant by well-being?

The literature presents a multilevelled and multifaceted picture of well-being. Building on a simplistic and general dictionary notion of happiness, health and prosperity, definitions incorporate emotional, physical, psychological, economic and material perspectives.

According to Day et al (2006), teachers perceived well-being as ‘the state of feeling healthy and happy’ (p 50). Moving to the perspective of headteachers, a general consideration of emotional well-being as ‘how we feel, think and behave’ (BBC Online, 2006) can be observed. A further viewpoint focuses on the positive nature of well-being, that it is ‘something that is more than simply the absence of stress or illness, but rather involves positive enjoyment and pleasure’ (Gambles et al, 2006 p 37). This last definition reflects a shift in thinking ‘from a concern with stress and illness to a focus on positive experiences’ (Day et al, 2006 p 51). In considering what this might mean for well-being in headship, this positive element suggests notions such as optimism and satisfaction, which, together with the emotional involvement underlying feelings, thinking and behaviour, would seem to be a critical part of health and happiness.

Focusing on the physical and psychological elements of positive well-being, as well as economic and material well-being, it is acknowledged that ‘these do not necessarily go hand in hand as people living in the richest societies are not necessarily the happiest’ (Gambles et al, 2006 p 37). In developing this economic theme of well-being, the authors note that ‘participation in paid work can be a vital source of well-being at different levels ... apart from income it can also contribute to a sense of identity, fulfil social needs and often contribute to social growth. However, much depends on the nature of the work’ (p 37). In transferring the findings that ‘teachers who work in schools in more challenging socio-economic contexts are more likely to experience greater challenges to their health, well-being and thus resilience, than those who work in relatively more advantaged schools’ (Day et al, 2006 p 262) to headteachers, the nature of the economic context would seem to be linked to their well-being. Notwithstanding, this link has yet to be explored through research.

Further developing the notion of positive well-being, Day et al (2006 p 52) note that ‘positive psychology at the subjective level is about positive experience: well-being, optimism, hope and happiness’, strengthening the link noted previously between well-being and

optimism. The authors note also that positive psychology, whilst being at a subjective level, is also at an individual level: it is ‘about the character strengths, the capacity for emotion and vocation, interpersonal skill, aesthetic sensibility, and perseverance, amongst others’ (p 51).

In terms of school context and well-being, the Variations in Teachers’ Work, Lives and Effectiveness (VITAE) research suggests that:

- *... some teachers themselves do seek and find, in different ways, their own sense of stability within what appears from the outside to be fragmented identities, and that the capacity to sustain such stability is directly associated with a combination of positive factors to be found within personal life situations and school working contexts.*

Day et al, 2006 p 148

Consideration for headteachers was not a specific focus of this study but this inference would seem to link directly to the findings of Chaplain (2001) with regard to contrasting perceptions of job satisfaction amongst a sample of primary headteachers.

In this, three key issues surrounding well-being are highlighted. Firstly, well-being has a positive nature that incorporates optimism, enjoyment and emotional involvement. Secondly, well-being is about character strengths including emotion, vocation and interpersonal skills. Thirdly, well-being has links with personal and professional identity.

2.4.2 What promotes well-being at work?

The study *Enchanted Headteachers* (Woods, 2002), provides some useful indications in terms of what promotes well-being at work for headteachers. In the study, Woods celebrates the success of these education professionals, seeking to ‘learn from headteachers who have managed to maintain their drive and commitment over a prolonged period of headship’ (p 3). The optimism, emotional involvement and enjoyment of these headteachers – all features highlighted in the analysis of well-being – will be considered in turn and the implications for the promotion of well-being at work discussed.

Firstly, if optimism is a feature of well-being, the ‘enchanted headteachers’ in Woods’s study demonstrate high levels of well-being. One of the headteachers interviewed, for example, described how

‘we never see change as a threat, we wouldn’t be bowed down by worry, we would be optimistic, and think if it’s going to improve things, to make things better, let’s do our best with it’ (p 11). Another explained: ‘I think it [change] is constant. Anything that comes along, there’s always a new challenge that we have to address and take on board and implement. There is always something to revitalise us’ (p 12). It would appear from this that, far from the challenges of change having a negative influence on the well-being of headteachers, the direct opposite is true: that constant change is a revitalising element contributing to well-being in headship.

Emotional involvement is the second point for the consideration of promotion of well-being at work for headteachers in *Enchanted Headteachers*. Woods identifies in the study four points for development in terms of emotional involvement: those of ‘personal investment in the job of being headteacher, the idea of it being my school, my staff, my kids, pressure and support [and] who says “well done” to the headteacher’ (p 19).

The last point in Woods’s list is highlighted also in response to the effective interventions for teachers in The Teachers Health and Wellbeing Study Scotland (Dunlop and Macdonald, 2004), and may provide pointers to the promotion of well-being in headship. In terms of support for teachers, the study noted that:

- ... *the headteacher’s role in being approachable, offering sympathy and emotional support for teachers and adopting a collegiate approach to proactive engagement with staff was perceived as important by teachers.*

Dunlop & Macdonald, 2004, p 72

There are messages here for the support systems for headteachers. Also in the study, teachers’ interest in interventions, such as annual health reviews and training workshops, might also be appropriate in terms of the promotion of well-being for headteachers.

Woods recognises the ‘emotional intelligence and interpersonal leadership’ of his headteacher sample. In his visits to schools, he saw that ‘in caring and in being passionate, my interviewees were also incredibly sensitive to the needs of others’ (Woods, 2002 p 10). There is a suggestion here that headteachers also need these elements from their leaders and stakeholders to be present in the wide range of their daily work. Indeed, in a comparative empirical study of why principals leave

the profession, which looked at the risk factors for premature departure in the Netherlands, it was found to be 'remarkable that in the interviews all men and almost all women mention the governing body as one of the factors playing a role in their premature departure' from school (Kruger et al, 2005 p 249).

In his consideration of the development phase of headship, Woods describes how 'headteachers, when questioned about their time in post, see this as their most active time, when the job is at its most satisfying and rewarding' (Woods, 2002 p 5). This is the time in post when headteachers find their work most enjoyable, taking us back to the enjoyment and pleasure in positive well-being (Gambles et al, 2006). Woods found this development phase of headship as:

- *... a period of growing confidence [with] increased effectiveness and constructive self-criticism. Headteachers have their greatest gains, their biggest successes in this period. They are building teams, delegating responsibility, showing staff they are valued in the school.*

Woods, 2002 p 5

Roles such as consultant leaders provide further challenge and change, further growth in confidence, opportunities for success and contribution beyond their own school – to support the ongoing well-being of both themselves and other headteachers. And in the same way that 'teachers' well-being can be positively and negatively affected by a number of issues such as the management of the school, the school ethos, the level of morale amongst staff and the opportunities presented to staff to undertake professional development' (Day et al, 2006 p 255), so it is for headteachers operating in the wider education system.

It is now worthwhile summarising the literature and findings about well-being and headship, drawing out the key details.

- Definitions of well-being are multilevelled and multifaceted. The notion of well-being has developed from one of stress and illness to one that incorporates a positive element.
- Definitions of well-being incorporate emotional, physical, psychological, economic and material perspectives.
- Character strengths, personal capacity and interpersonal skills are integral elements of well-being, as are personal and professional identity.

- Responses to the challenge of change and optimism are important in promoting well-being in headship, as is the need for emotional involvement with and from a range of stakeholders, and enjoyment, satisfaction and reward.
- The well-being of headteachers is affected by the operational and strategic working environment and the ethos and morale within the education system as well as opportunities to undertake professional development activities.

2.4.3 Job satisfaction and stress in relation to headship

As Glatter and Harvey (2006) identify, the 2005 report from the School Teachers' Review Body (STRB) drew attention to the significance of factors other than pay in the quest for applications to senior positions in schools:

- *Whilst pay is cited as a factor it is the responsibilities and expectations of deputies and heads that are the biggest source of dissatisfaction to job-holders and the most significant deterrent to aspiring leaders.*

Glatter & Harvey, 2006 p 41

The current difficulties experienced in attracting applicants for headship and in retaining experienced headteachers are not new (Mercer, 1997). Therefore, an understanding of what contributes to both job satisfaction and dissatisfaction is increasingly urgent. However, as Chaplain (2001) underlines, the issue at heart may remain one of finding the balance between the perceived positive and negative aspects of the role as the responsibilities and expectations generated by policy and practice constantly shift. It is, therefore, at this point in the debate that explorations of stress in the lives of headteachers become both significant and inevitable.

2.4.4 Definitions of stress

There is no definitive definition of the term 'stress'. There is a variety of definitions with each researcher seeming to analyse the concept from his or her own perspective. Whereas some interpret stress to be a dependent variable, others regard it as an independent one. Yet others, drawing elements from both of these approaches, consider stress to be transactional or interactional: the result of an imbalance between the person and his or her environment. The way that Wilson identified Selye's original definition (1956) of stress – 'a general adaptive syndrome

or non-specific response to demands placed upon the human body. These demands could either stimulate or threaten the individual' (cited in Wilson, 2002 p 4) – emphasised the importance of recognising the individual nature of the positive and negative effects of stress. Although some professionals react badly to increasing work pressures, others find that overcoming the challenge of coping in such circumstances creates a positive sense of self-efficacy (Chaplain, 2001). However, the definition of teacher stress laid down by Kyriacou (2001), highlighting the negativity of stressful experiences, would seem to reflect most closely the usage of the term 'stress' in the teaching profession and therefore most relevant to this study. His definition is:

- *... the experience ... of unpleasant negative emotions, such as anger, anxiety, tension, frustration or depression, resulting from some aspects of their work.*

Kyriacou, 2001 p 28

Pashiardis & Tsiakkios (2004) open their discussion of occupational stress among Cyprus headteachers with an endorsement of Selye's characterisation of stress (Selye, 1974, cited in Pashiardis & Tsiakkios, 2004 p 1) as 'the spice of life', underlining that 'although too much stress may be damaging to our body and disastrous for our mental health, some stress may be a source of motivation and challenge if put under proper control'. Exploring how headteachers do or do not maintain equilibrium, by controlling the stresses caused by additional, different or conflicting demands placed upon them, may lead to an understanding of the complexity of an individual's relationship to the role and identity of being a headteacher.

2.4.5 Headteachers and stress

However, the warning sounded by Hiebert and Farber (1984) should be heeded:

- *... teachers read reports that teaching is stressful and start to believe it. As a result normal upsets that are part of most jobs become mislabelled as chronic, inherent stressors, and a vicious circle begins that results in a higher incidence of self-reported stress.*

cited in Chaplain, 2001 pp 11–12

Many studies over the last decade have provided extensive documentation of the causes of teacher stress. A review of the literature undertaken for the Scottish Council for Research in Education (SCRE) by

Wilson (2002) provides a concise summary (pp 9–11) of the recorded causes of teacher stress, namely:

- workload
- pupils' failure to work or behave
- poor working conditions
- generally in terms of relations with colleagues
- poor school ethos
- change
- raising standards
- school mergers

Wilson also draws attention to the findings of Travers and Cooper (1996, cited in Wilson, 2002) who identified problematic changes causing additional pressure on the teaching profession: a lack of support from central government; constant changes within the profession; a lack of information as to how changes are to be implemented; diminishing social respect for teaching; and the move towards a national curriculum.

During the 1990s, there was a gradual upsurge in the research interest shown in the impact of these changes on headteachers as a distinct group separate from classroom-based teachers. The study by Cooper and Kelly (1993) of occupational stress amongst 2,638 headteachers of primary and secondary schools and principals of further and higher education establishments sought to assess the extent and sources of headteacher stress, to inform any effort to maximise job satisfaction and psychological well-being.

A three-stage process was undertaken, the first consisting of clinical interviews with a sample of headteachers and principals to capture data on actual and potential stressors. Next, a battery of questionnaires was prepared based on existing materials and the interview findings. The questionnaires included the independent variables of biographical measures, personality measures and work stressor measures and two further independent variables, mental health and job satisfaction. These questionnaires were then distributed to the sample headteachers and principals.

This study found that levels of job dissatisfaction and mental ill-health were highest in primary schools, with levels in secondary schools being higher than in further education (FE) and higher education (HE) establishments. Furthermore, female secondary, FE and HE principals

were suffering from greater job dissatisfaction than their male counterparts. However, male headteachers and principals were found to be suffering from more mental ill-health. The two chief sources of occupational stress leading to job dissatisfaction were 'work overload' and 'handling relationships with staff'.

In their charting of the theoretical background to their study, Pashiardis and Tsiakkios (2004) record the findings of other previous research. Carr (1994), when studying 94 South Australian headteachers, found that the three main factors causing stress were: the perception of a lack of support from the Education Department; coping with heavy work demands and employer expectations; and a difficulty in personal relationships with other staff. Ostell and Oakland (1995, cited in Pashiardis and Tsiakkios, 2004) grouped problematic situations faced by headteachers under the headings of:

- organisational
- external conflicts and complaints
- behavioural and special needs
- internal conflicts and complaints
- personnel performance
- motivation and morale
- recruitment
- intrapersonal

They also identified that educational changes were reported more frequently as the main difficulty experienced by headteachers (Pashiardis and Tsiakkios, 2004). The findings of Pashiardis and Tsiakkios's own research, conducted using a range of qualitative and quantitative data, arising from questionnaires with 200 Cypriot headteachers and semi-structured interviews with 11, indicate that 'despite the high level of reported stress, Cyprus headteachers are very satisfied [with] their job' (p 9).

They conclude that, given the multidimensional and multilevel nature of headteacher stress, headteachers need support in learning how to manage stress effectively. In their view, stress is integral to all human activity, thus they assert that:

- ... *occupational stress should be confronted by headteachers as a test that will lead them to professional maturation and as a result it should be regarded as a creative challenge which can lead through its proper management to productive results.*

Pashiardis & Tsiakkiros, 2004 p 10

Questions centring on professional development in relation to job satisfaction and the management of stress will be returned to later in this review.

2.4.6 The relationship between stress and job satisfaction for headteachers

While ‘job satisfaction’ can be defined as ‘the positive emotional reactions and attitudes an individual has towards their job’ (Faragher et al, 2005 p 106), there is debate about whether job satisfaction can be classified as a global concept or whether it is composed of facets of satisfaction with various aspects of an individual’s job. In the UK, the research of Mercer (1996; 1997) with secondary headteachers and Chaplain (2001) with primary headteachers gives clear insights into the relationship between negative stress, stress management and job satisfaction, unravelling the particular aspects of headship which contribute most significantly to an overall feeling of job satisfaction.

2.4.6.1 Mercer (1997) – secondary headteachers and job satisfaction

It would seem that, in investigating the levels of job satisfaction of headteachers and particularly the profile of these levels over time, Mercer was responding to the information flowing from the Howson report (1995, cited in Mercer, 1997) assessing the labour market for senior staff in schools and Whitaker’s analysis (1996, cited in Mercer, 1997) of the early retirement rates in the USA. Crucially though, he was also responding to the gap in research dealing with job satisfaction in the education sector. Guided by an adaptation of the Johnson and Holdaway (1994, cited in Mercer, 1997) model of job satisfaction that records factors affecting the job satisfaction and dissatisfaction of headteachers in Canada, Mercer sought to generate a more easily usable model that was specifically applicable to the UK context. Over a period of 13 months, Mercer conducted interviews with 39 secondary headteachers in north-east England. Each interview explored aspects or concepts with each headteacher raised by his or her response to the question: ‘Can you think of a time when you felt really good/bad about

your job? Tell me about it.’ Mercer arrived at a list of 23 satisfiers and 26 dissatisfiers from which he could then create the general categories shown in table 2.

Table 2: Categories of job satisfaction and dissatisfaction for headteachers

Categories of job satisfaction	Categories of job dissatisfaction
<ul style="list-style-type: none"> • Having a positive view of oneself • Being able to control one’s environment • Having a positive view of the quality of education provided by one’s school • Being comfortable with one’s role • Having good relationships with others 	<ul style="list-style-type: none"> • Role conflict • Context within which schools operate • Factors affecting the ability of the headteacher to function as she or he sees as being important • Having a negative view of oneself

Source: Mercer, 1997 p 62

A further analysis of the proportionality of the constituents of job satisfaction and dissatisfaction revealed the great importance of categories that involve how much in control of the situation the headteacher feels him- or herself to be. Mercer further found that by bringing the two sides of the equation of satisfaction together, all categories could be further grouped to show the three major elements in questions of job satisfaction for these secondary headteachers, namely:

- sense of efficacy
- perception of self
- relationships

In contrast to the Johnson and Holdaway model, Mercer’s findings locate ‘personal needs and values’ as central to job satisfaction for his sample of headteachers, with a particular emphasis on the perceptions of the individuals actually involved in terms of how far these needs and values

are satisfied. It is likely, therefore, that it is those aspects or demands of the post that are felt to be beyond the control of the individual which result in job dissatisfaction.

Turning to the question of job satisfaction in relation to time in post, Mercer subjected his data to further analysis. In contrast to Cooper and Kelly (1993) who found that the longer that headteachers had been in post, the greater their dissatisfaction, Mercer's study indicates a far more complex picture than the previously accepted one of 'an initial surge of enthusiasm followed by a gradual diminution over time' (Cooper & Kelly, 1993, p 269). Dividing his sample into cohorts according to time in post (fewer than 5 years, 5–10 years, and more than 10 years) gave Mercer 3 groups of headteachers, 13 in each with mean times in post of 1.9, 7.6 and 14.6 years. Using the 23 job satisfaction and 26 job dissatisfaction concepts previously developed, Mercer analysed the participants' responses according to their time in post. The data showed that the new headteachers appeared to have a high level of both satisfaction and dissatisfaction. Not surprisingly, there was a noticeable decrease in both for those who had been in post between 5 and 10 years. The pattern revealed amongst the group longest in post was contrary to findings in other research projects, in that they had experienced a rise in both satisfaction and dissatisfaction.

In relation to a sense of efficacy, the issue of staff development is prominent in the headteachers' responses. Mercer speculates that, in this regard for those in headship for between 5 and 10 years:

- *... it may be that the early idealism was replaced with the more pragmatic reality that there is a limit to what can be done with a group of staff, that relatively early gains in staff development had been made and that more permanent gains require a continuing effort, often delegated to other staff.*

Mercer, 1997 p 273

By contrast, the upturn in satisfaction amongst the most experienced group could be 'that these individuals feel more secure in the headship, their long experience of dealing with individuals allowing them to gain satisfaction from relations which have become less threatening' (p 273). Perhaps experience brings increased skill in dealing with staff, hence significantly enhancing the headteachers' views of their own efficacy.

Placing his research within the timescale of the explosion of government education initiatives centring on the ERA in 1988, Mercer

(1997) draws further conclusions. Those interviewed in 1992–93 who had been in post for between 5 and 10 years would have been appointed between 1982 and 1987. It could therefore be argued that they were recruited into headship with a perception of the role shaped by their experience, only to find that the ‘traditional’ model no longer pertained, being replaced by the ‘new headship’ model (Ball, 1991, cited in Mercer, 1997; Evetts, 1994). Conversely, the group who had been in post for five years or under would have been under no illusions about what would be expected of them. Furthermore, the longest serving headteachers in the sample had had extensive experience as well as long-standing relationships with their local education authority, governing bodies, parents and staff, which would have enabled them to be more robust in their dealings with the changed agenda. Mercer pays particular attention to the changes wrought in the lives of headteachers and their sense of efficacy through the introduction of LMS, drawing out the issues associated with the potential conflict for headteachers in their roles of leading professional and chief executive.

In relation to the second clustering of categories around the concept of ‘perception of self’, Mercer searches for the answer to why there should be a significant decline in satisfaction for those in the middle group. He suggests that once the honeymoon period of early headship is over, headteachers find it harder to get positive feedback, resulting in a mid-career dip in the view they hold of themselves. Greater experience and age, on the other hand, enables the third group to be less concerned with what others think and a growth in self-satisfaction. The fact that the most experienced headteachers equated the highest levels of satisfaction with the quality of education provided by their own school suggests to Mercer that they can see how their hard work over a period of years is coming to fruition, whereas the middle cohort may have lost their early sense of excitement about school improvement.

The relationships cluster reveals the same mid-career dip. Here, where there are particularly marked declines for those in headship for 10 years or under, the explanations offered include having to face up to the loneliness and isolation of the position of headteacher, leading to the noted decline with regard to collegiality, protection of staff and relations with staff. Overall, the conclusions from Mercer’s research indicate that all three groups obtain more satisfaction than dissatisfaction but would also indicate the need for professional support for headteachers in mid-career. He concludes:

- *There is an urgent need to identify the reasons for the trend towards early retirement and to put in place professional and personal support structures which might prevent this haemorrhage of experienced headteachers.*

Mercer, 1997 p 280

2.4.6.2 Chaplain (2001) – primary headteachers’ stress and job satisfaction

According to Chaplain (2001), Cooper and Kelly (1993) identified that the two main sources of stress for headteachers, ‘work overload’ and ‘handling relationships with staff’, were more prevalent in primary than secondary schools. They cited a number of causes: lack of clerical support; small school size and hence lack of variety, rewards and power; relatively low school status and a perception of the less demanding nature of their job; and the amount of teaching cover that they had to provide. Chaplain’s study focused on 19 female and 17 male headteachers, aged between 33 and 54 years, in the West Midlands–East Anglia region. Using a self-report questionnaire with open and closed questions followed by individual hour-long interviews, the study sought to discover what headteachers found most stressful and what provided most satisfaction in their everyday work.

The questionnaires revealed that 55 per cent of the primary headteachers considered being a headteacher ‘very or extremely stressful’ with a further 40 per cent rating the job as ‘moderately stressful’. The most commonly reported stressors fell in the category of ‘school structures’ (eg maintaining standards and budgets), with ‘interpersonal processes’ (eg relationships with teachers and parents) being the second, ‘external factors’ (eg legislation, governors, inspections) third and ‘personal factors’ (eg professional activities and lifestyle) fourth.

However 56 per cent of these headteachers also reported they were ‘very satisfied’ or ‘satisfied’ with their jobs. The aspects of their work that brought the most satisfaction related to their professional status, challenge and their own performance. In addition, most heads were satisfied with the facilities and resources in their school and with their own school’s organisation, even though issues concerned with school organisation were also cited as the principal cause of most stress. The apparent contradictions evident in these responses highlight why this is such a challenging focus for researchers.

Chaplain reports the interview data under the following six headings. The potential for positive and negative outcomes in the form of stress or satisfaction for the headteacher in each of these categories is clearly illustrated.

Managing self

Applying the concepts of self-efficacy and the locus of control, Chaplain illustrates how personal control can be a double-edged sword for some primary headteachers in his sample. Whilst gaining satisfaction from the awareness of their personal ability to achieve important goals and appreciating being able to make the choices necessary to target the needs of their particular schools, the headteachers also indicated issues about feeling that they had to always be in control, which could lead to 'overwork, fatigue, lowered self esteem and increased uncertainty' (Chaplain, 2001 p 204).

Managing others

Recognising the importance of teamwork, high morale and enjoyment of work, a majority of the headteachers in the sample reported spending most time managing others, both adults and pupils, thus generating increased confidence and creativity in themselves as well as others. However, there was also a frequent acknowledgement that the 'interrelationship between self-management and the management of others ... could be either a source of stress or satisfaction' (p 204). Several heads reported a lack of support from others, such as parents and the local authority, while many felt undervalued by colleagues and others. There was a real difficulty expressed in balancing personal and professional relationships, particularly where disciplinary issues arose with staff.

Managing finances

Many of the participants felt well supported with regard to financial management and enjoyed using resources creatively to achieve the school's priorities to achieve value for money. However, this was not always the case. The cyclical and spasmodic nature of the financial tasks resulted in some headteachers working out of school time in order to be uninterrupted and to meet deadlines. Most stress came from uncertainty about future financial allocations and the lack of information in this respect. Managing declining budgets and maintaining solvency were significant concerns.

Managing the curriculum

Participating headteachers recorded very clearly their delight in improving the curricular experience for pupils and providing them with a solid base. However, they also drew attention to the main stressors being the requirements imposed by the government, particularly the frequent changes to the national curriculum and assessment procedures, combined with a lack of resources and staff who lacked the relevant skills and knowledge to effect the new requirements.

Managing change

The management of change, some of which was imposed, made many participant headteachers feel empowered because they were making things happen and achieving a consensus through the active involvement of staff. They relied on the support of colleagues, governors and local authority staff as well as appropriate in-service education and training (INSET). Their priorities were to juggle the external pressures alongside the school's own priorities, preserving good practice and sticking to principles whilst making the necessary changes in the best ways possible. Stress resulted from staff anxieties and some teachers' lack of competence in carrying out the changed practice.

Stress and social support

Sources of great satisfaction were the quality of relationships, enabling and empowering others, enjoying support and a shared focus. Participating headteachers particularly valued being able to access the support and advice of other heads, but were wary of intruding on their time. Some heads highlighted the support of staff in their own school.

Of the 55 per cent who reported experiencing '*very high*' levels of stress on a regular basis, 33 per cent were nevertheless '*very satisfied*' with their work, while 22 per cent were '*not satisfied*' with their work. While the '*very satisfied*' group included equal numbers of males and females, the '*not satisfied*' group were exclusively female. Chaplain's comparison of the sources of stress and satisfaction for these two groups reveal that whereas the '*very satisfied*' group derived most satisfaction from personal factors (competence, autonomy and satisfaction with personal performance and health), these factors caused most stress to the '*not satisfied*' group, who gained most of their satisfaction from structural factors (quality of resources and the curriculum). Most stress for the '*very satisfied*' group arose from interpersonal factors. As Chaplain concludes:

- *While recording levels of stress can be helpful, it can also obscure more complex relationships between stress and satisfaction. Heads who reported their work was very stressful could differ markedly in their levels and sources of job satisfaction.*

Chaplain, 2001 p 213

It is now worthwhile summarising the literature and findings around job satisfaction, stress and headship, drawing out the key details.

- There is a continuing debate surrounding a precise definition of stress.
- Although there is a significant body of research on stress, relatively little focuses on headteachers.
- Continuing to explore how headteachers maintain equilibrium by reacting to and controlling their range of stressors may lead to a deeper understanding of the complexities of their role.
- Because their stress is multidimensional and multilevel in nature, headteachers need support in learning how to manage it effectively.
- There is conflicting evidence concerning the relationship between primary headteacher job satisfaction and time in post, indicating a need for further research.
- The major elements in questions of job satisfaction for secondary headteachers have been identified as: self-efficacy, perceptions of self and relationships.
- An overemphasis on stress can obscure more complex relationships between stress and job satisfaction. There is a need to address why headship can be simultaneously stressful and satisfying or unsatisfying.

2.5 work–life balance

The interaction between well-being, job satisfaction, stress and work–life balance is a constant theme in the literature and therefore throughout this review. This section on work–life balance builds on the earlier exploration of well-being in particular because:

- *Well-being implies a sense of balance, a capacity to manage pressures in life and work, together with a sense of control. Although, an inevitable part of work and life, there are likely to be times when everyday pressures turn into unhealthy stresses which have adverse emotional, mental or physical effects. The balance that teachers have to achieve is between the pressures at work and those in their personal life.*

Day et al, 2006 p 255

‘work–life balance’ has emerged as a widely used and popular way of talking about challenges of combining paid work with other parts of life’ (Gambles et al, 2006, p 34) and currently has prime importance globally as well as in the UK education system. The shift noted previously in the concept of well-being is paralleled here, in that work–life balance seems to have replaced family-friendly policies: there has been an increase in ‘demanding working practices and environments leading to feelings of pressure, lack of time and general “busyness”’ (p 34). Although additional workload ‘on its own is not necessarily a problem, it is commonly associated with increased stress, teacher burnout and low job satisfaction’ (Timperley & Robinson, 2000 p 47). Although focusing here on teachers, these ideas are relevant also for the wider workforce, including headteachers and other senior leaders.

Before looking specifically at the issues surrounding the work–life balance of headteachers, it is interesting to look at the terminology of the concept.

Gambles et al (2006) argue that the term ‘work–life balance’:

- *... paints a superficial and oversimplistic picture of the many challenges it seeks to address. It appears to suggest that work is not a part of life. Yet paid work – although often too much of a part – is a necessary and often meaningful and rewarding aspect of life for many people.*

Gambles et al, 2006 p 34

This is illustrated by the perspective of one headteacher in an article for NCSL’s *Ldr* magazine (Spencer, 2002): I work every evening, I work at the weekends, and I can’t ever see that changing. But if you’re asking me am I burning myself out? I don’t think so. It’s a great job and I love it.’ This must, of course, be considered alongside other perspectives

because ‘what constitutes reasonable work–life balance varies over time and from individual to individual (Training and Development Agency for Schools (TDA), 2006b).

Another headteacher in Spencer’s article, for example, was quoted: ‘I’m single and I can’t begin to imagine how colleagues with young families do this job. I don’t have time for leisure interests because I’m too busy trying to meet everybody’s expectations.’ From a further perspective, another headteacher described how ‘it’s very important to me that I have my life, so I make a rule never to take work home and to ensure weekends are mine’. In concluding their consideration of the terminology of work–life balance, Gambles et al (2006) prefer to think in terms of harmony, of ‘harmonising paid work with other parts of life’ (p 35), implying that associated activities such as ‘friendship, leisure activities and community participation are interrelated and not antithetical to each other, or needing to be “balanced”’ (p 35).

2.5.1 What is meant by work–life balance?

In developing the idea that work–life balance has emerged ‘as a widely used and popular way of talking about challenges of combining paid work with other parts of life’ (Gambles et al, 2006 p 34), it is clear that the concept has current importance and interest. Johnson (2001) wrote:

- *To state the obvious – everyone has a life and responsibilities outside work. People want a decent job but they want it as part of fulfilled life outside the workplace. work–life balance simply describes any set of policies and practices that employers can put in place, which help people achieve better balance between work and their lives outside work and benefits the business.*

Department of Trade and Industry, 2006

The Mental Health Foundation website (www.mentalhealth.org.uk) (2006) highlights the need for work–life balance, defining it as ‘how you combine work with the other areas of your life, such as childcare, socialising or exercise. work–life balance is an issue for all workers, not just parents, and deals with when we work and for how long’. This definition provides a useful basis for reflection by the headteacher with worries about the hours that they work and how sustainable their job will be over a longer number of years (Spencer, 2002).

As a prelude to further consideration of work–life balance, it is useful to reflect upon the national agreement. The agreement, which details

that all teachers, including headteachers, should enjoy a reasonable work–life balance with effect from September 2003, writes of the concept:

- *The national agreement defines work/life balance as being ‘about helping teachers combine work with their personal interests outside work’ and cites working hours and workload as key, but not exclusive elements of this. Other elements include a sense of control, personal fulfilment, career development, work flexibility, physical and emotional wellbeing, and the will of both employers and employees to ensure staff enjoy a reasonable work/life balance.*

TDA, 2006a

It is ironic, then, that in making provision for the 26 administrative tasks highlighted in the agreement as no longer appropriate for class teachers, ‘many of the strains of ensuring that these new requirements for staff are met have fallen upon senior leaders with no additional funding emanating from central government. Many senior leaders are still carrying out far too much administration’ (Duncan, 2006, p 3). Despite the right that is enshrined in law, that ‘all teachers and headteachers are entitled to enjoy a satisfactory balance between the demands of their professional duties and their personal interests outside work’³, according to Spencer (2002), ‘the unfortunate reality for most headteachers in 21st century Britain is a 60-hour week and any yen for a good work–life balance is killed off by 100 hours of work pending in the in-tray’. Furthermore the NAHT 24/7 report (Daniels and French, 2006) reveals that, despite the specific policies designed to address work–life balance, such as dedicated headship time introduced in 2005, more than one-third of survey respondents did not get any such time.

In what is presented by Timperley and Robinson (2000 p 58) as ‘a somewhat controversial position’ they argue that ‘increased workload and stress associated with a self-managing environment can be attributed, in part, to the ways in which teachers organise themselves’. Although focusing on teachers rather than headteachers, there may be relevant messages, in that in attempting ‘to reformulate the workload problem by challenging the common-sense notion that teachers are victims of ever-increasing demands on their time with ever increasing workloads’, there is a suggestion that ‘the way in which the teachers set about their work might contribute to the problems of workload’. In the case study of Phoenix College, a large secondary school in New Zealand,

³www.nasuwt.org.uk/Templates/Internal.asp?NodeID=71686

the authors note that ‘workload is increased through fragmentation, duplication of effort, proliferation of new ideas and a reluctance to challenge colleagues’ (p 58). This provides food for thought, when according to Cooper (Spencer, 2002), ‘the time is more than ripe for leaders to work “smarter” not harder’.

2.5.2 What strategies do headteachers adopt to maintain work–life balance?

According to Duncan (2006), school leaders ‘need to embrace [their] accountability in a more realistic way, bearing in mind [they] are mortal and need rest and relaxation as much as fulfilling work. By changing [their] own attitudes to [their] jobs [they] will be able to influence [their] colleagues and ensure [their] schools and colleges are good environments to work in’ (p 25). Duncan offers a number of strategies, such as an early start to the working day when home circumstances permit, moving to a clear desk policy, delegation, reconsideration of meetings and training days are offered as steps towards improved work–life balance. The author also urges headteachers ‘to think “is this activity fit for purpose?” and “do I do this efficiently and effectively?”’ (p 26). Duncan gives the reader a final reminder of ‘the need to work “smarter” rather than harder’ and that school and college leaders not only have to make sure that they are doing this, but that they can be seen to be doing it (p 33).

It is now worthwhile summarising the literature and findings around work–life balance and headship, drawing out the key details.

- There is a limited field of research and literature focusing on the work–life balance of headteachers.
- work–life balance has emerged as a widely used and popular way of talking about challenges of combining paid work with other parts of life and currently has prime importance globally as well as in the UK education system.
- work–life balance varies over time and between individuals.
- The concept of harmonising, of bringing together work and activities such as friendship and participation in the community, is an alternative perspective to work–life balance.
- In making provision for the work–life balance of teachers, many headteachers are taking on additional administrative, financial and organisational work.

- Headteachers should view accountability more realistically, recognising the need for rest and relaxation as much as fulfilling work.
- The viewpoint that additional workload can be attributed to poor working practices provides food for thought in consideration of the work–life balance of headteachers.

2.6 Implications for future research

- *There is an urgent need to identify the reasons for the trend towards early retirement and to put in place professional and personal support structures which might prevent this haemorrhage of experienced headteachers.*

Mercer, 1997 p 280

Conducting this literature review has repeatedly reinforced the urgent need for further empirical research into the ways in which contemporary headteachers carry out their role so that the specific and complex relationships between well-being, stress, job satisfaction and work–life balance can be thoroughly explored and understood. *Without such a body of robust evidence it will prove difficult for policy-makers and employers to address the current difficulties surrounding recruitment and retention of headteachers.* Some of the literature also indicates scope for further empirical research into the ways that differences between male and female headteacher responsibilities, attitudes and expectations feed into their self-efficacy.

The overwhelming message from this review is the need for more in-depth empirical research into the specific characteristics of current headteacher workloads, the ways in which they manage these, and their well-being and job satisfaction. This study was therefore designed to gain a comprehensive insight into the working lives of a group of 34 contemporary headteachers. This group was the focus of the fieldwork, which explored the specific and complex relationships between well-being, stress, job satisfaction and work–life balance and headship practice.

➔ 3. Methodology

3.1 Sample

Invitations for participation were sent by email. A small sum of money for staff cover and an NCSL publication of choice were offered as incentives. A sample of 34 participant headteachers was secured. This sample covered all government office regions. 53 per cent of participants were female and 47 per cent male. This sample was drawn from a database of NCSL’s New Visions graduates, ie those recently appointed to a headteacher role, and NCSL’s Leadership Programme for Serving Headteachers (LPSH) graduates, ie experienced headteachers, and headteachers engaged in NCSL’s regional leadership network. In addition, headteachers were drawn from a database of NCSL non-involvement schools. The use of these sources provided a mix of new and experienced headteachers within the sample. In addition, some participants had not previously taken part in NCSL programme or research activities. The characteristics of the participants by phase, government region, gender and experience can be seen in table 3 below.

Table 3: Characteristics of the sample headteachers by phase, government office region, gender and experience

Headteacher	Phase	Government office region	Gender	Experience
1	Primary	East Midlands	Female	Experienced
2	Primary	Yorkshire and Humber	Male	Experienced
3	Secondary	London	Female	Novice
4	Primary	East Midlands	Female	Experienced
5	Primary	South East	Female	Novice
6	Primary	East Midlands	Female	Experienced
7	Special	East of England	Female	Experienced
8	Secondary	North West	Female	Novice
9	Primary	South East	Female	Novice
10	Primary	London	Male	Experienced
				<i>continued</i>

Headteacher	Phase	Government office region	Gender	Experience
11	Primary	West Midlands	Female	Experienced
12	Primary	East of England	Male	Experienced
13	Primary	East of England	Male	Experienced
14	Primary	Yorkshire and Humber	Male	Novice
15	Secondary	North East	Female	Experienced
16	Primary	North East	Male	Experienced
17	Secondary	West Midlands	Male	Experienced
18	Secondary	East Midlands	Male	Experienced
19	Secondary	London	Male	Experienced
20	Special	West Midlands	Female	Experienced
21	Primary	East of England	Female	Experienced
22	Secondary	South West	Male	Experienced
23	Primary	North East	Female	Experienced
24	Primary	East of England	Male	Experienced
25	Special	London	Female	Experienced
26	Primary	North East	Female	Experienced
27	Secondary	South West	Male	Novice
28	Secondary	South East	Male	Experienced
29	Primary	East of England	Female	Experienced
30	Primary	West Midlands	Female	Experienced
31	Primary	West Midlands	Male	Experienced
32	Primary	South West	Male	Experienced
33	Primary	East of England	Female	Experienced
34	Secondary	West Midlands	Male	Experienced

3.2 Researchers

The project used 20 research fieldworkers. A core team of four researchers within the NCSL Research and Policy Group designed and orchestrated the study as well as carrying out fieldwork. The remaining

16 researchers were drawn from other NCSL groupings and the Department for Education and Skills (DfES) and carried out fieldwork. In order to ensure consistency, project briefings were held for all researchers following the pilot exercise (for details of the pilot, see section 3.3.1 below). Further research support was received from a subject matter expert, a leading UK academic with extensive knowledge and expertise in the field. The researchers were in contact with the project co-ordinating team at all times during the fieldwork and advice was made available to them when queries were raised. In addition, they were encouraged to share their experiences of the project via email and through the project co-ordinating team.

3.3 Research design measures

The study employed a three-stage research methodology.

1. A journal was completed by each participating headteacher (see Appendix 1).
2. An observation or shadowing visit was made to each participating headteacher and their school (see Appendix 2).
3. An interview was held with each participating headteacher (see Appendix 3).
4. Data analysis was performed, using a matrix document outlining the central themes of the work (see Appendix 4).

The research tools were constructed with the help of a subject matter expert who advised on the design and content prior to piloting.

3.3.1 Piloting

The journal, observation visit, including the observation schedule, and interview schedule were piloted in one school. Feedback was sought and subsequently incorporated into the design of the study and the research tools.

3.3.2 Journal

A copy of the journal document was sent to each participant. The journal document contained pages that were set out to enable daily journal entries. Pages could be easily removed once the journal exercise was completed. As an alternative, participants were given the option of

completing an electronic copy of the journal. To enable this, an electronic version of the paper journal was constructed. This document was emailed to participants on request. Participants were asked to keep a journal over a period of two weeks.

The journal was designed to provide primary data on the activities of participants and give them an opportunity for self-reflection. Participants were requested to include activities that went beyond the normal school day – before school and after school. Participants were asked to make brief journal entries of no more than two pages per day. They were asked to make these at the end of each day. To enable the project researchers to evaluate the activities listed and to get a clear picture of both the stressful and positive aspects of their jobs, participants were asked to make their entries fairly specific, ie ‘paperwork’ was said to be too generic, whereas ‘writing the school improvement plan’ was indicated as being more useful.

Participants were also asked to offer reflections on any high points, low points and critical incidents that occurred throughout the two weeks. Stressful incidents were to be logged and identified with ‘low’ and the rewarding and satisfying points of day were to be logged and identified with ‘high’. A critical incident for the purposes of this exercise related to the type of event that caused excessive anxiety, distress or a pressure on feelings, eg a staff disciplinary or an incidence of violence (see Appendix 1 for an example of a journal).

3.3.3 Observation visit

A researcher visited each headteacher for a working day to shadow their activities. The visit was based upon non-participant observation with limited clarification by the researcher of the participant’s activities. Researchers clarified the roles of those who interacted with and spoke to the participant. Researchers also posed a limited number of questions at the beginning of the day (see Appendix 2 for the observation schedule), essentially about what the headteacher was hoping to cover during the day.

An observation schedule was produced to help guide the note taking and ensure consistency across the research group. Researchers noted what the head did, and for how long and with whom. Researchers were also briefed to record:

- what heads said, ie key words, phrases and quotes

- what got through to them, ie mail or impromptu meetings
- how they gathered, processed and acted on information
- how they monitored, reflected and dealt with changes

Whilst not naming individuals who interacted with the headteacher in this document, researchers did detail their role. Each researcher produced a typed version of their observation notes within two weeks of each visit. In addition to the typed-up observation schedule, researchers also produced a field note of no more than half a page of A4 using the observation reflections that gave an overview of what they had observed.

3.3.4 Interview

Following the work-shadowing and the completion of the journal, there was a follow-up interview with each headteacher. These were semi-structured interviews (see Appendix 3 for the interview schedule) lasting between 45 minutes and 1 hour. A semi-structured interview schedule was produced with a list of generic interview questions. All researchers posed these questions but also had an opportunity to pursue additional or ad hoc questions. Each interview was recorded with a portable recording device having secured permission from the headteacher to do so. Interview schedules were typed up and provided key points and quotations under the appropriate section in the schedule. These manuscripts were sent for analysis within two weeks of the interview. In addition, researchers produced a field note summarising the outcomes of the interview.

3.4 Analyses

Two members of NCSL's Research and Policy Group analysed the headteacher journals to explore the activities that participants undertook during the two-week period. The journals were subjected to a content analysis. For this, the researchers utilised a set of categories based upon the national headteacher standards⁴ and content of the first 10 journals received. These categories enabled the researchers to summarise the content of all 34 journals. In addition, an estimation of time was placed alongside each activity category. Microsoft Excel and SPSS software was used in this analysis.

⁴www.ncsl.org.uk/nationalstandards

Additionally, a team of four researchers from NCSL's Research and Policy Group analysed the journal, observation and interview transcripts in full to explore issues of well-being, work–life balance, stress and job satisfaction. Utilising NVivo software, this was facilitated by the use of a matrix document outlining the central themes of the work (see Appendix 4). This process was reviewed by the group after each researcher had completed two batches. This check served to establish that the matrix document was effective in drawing out key activity and practice around the themes and it ensured that common categorisation was established. Frequencies were then produced for the categories underneath each of the central themes within the matrix. A further grouping of issues was then carried out before drafting this report document. The draft was then sent to subject matter experts for final interpretation and input.

➔ 4. Results and discussion

The findings from this study are presented below, beginning with a summary of the working lives, practices and experiences of participants (sections 4.1 to 4.3). In sections 4.4 to 4.9, the authors explore the working lives, practices and experiences of participants in greater detail, with specific reference to the issues of job satisfaction, well-being and work–life balance.

4.1 What does the working life of a headteacher look like in 2006?

Data on the working lives of participant headteachers came from all three methodologies (journal, observation visit and interview) employed in this study.

As noted, participants completed a journal, within which they described their main areas of activity. This journal was also used to identify critical incidents, defined in this study as aspects of their working lives which were seen as excessive emotional highs and lows, ie points during the working week which were highly stressful and potentially most threatening to their overall well-being.

The overwhelming majority of participants completed the journal for a two-week period, whilst a minority only completed it for one week. Further information on the nature of the working week was obtained via the shadowing of the headteacher (non-participant observation) and the subsequent follow-up interview.

4.2 Nature of the working life – overview of main tasks

During the course of the study, individuals made free text entries into their journals to describe the nature of the activities they undertook. They were also asked to provide some indication as to the length it took for them to complete each task that they recorded. Whilst in practice, some participants provided more detail than others on both of these aspects, it was nevertheless possible to develop a categorisation of the main areas of activity and the relative time spent on each.

In total, 54 different areas of activity were described by participants. Closer inspection of these identified seven broad categories. An eighth category, ‘various tasks, unspecified time’, was also included for completeness of time – this relates to occasions when individuals were simultaneously undertaking more than one activity, and did not provide

an allocation of time for each aspect. The categories and their constituent items are summarised in table 4.

Table 4: Summary of broad task groups and individual activities for headteachers

Broad task group	Individual constituent activity
<i>1. Strategic leadership</i>	<ul style="list-style-type: none"> 1. Strategic planning 2. Leadership meetings 3. Classroom observations 4. Self-evaluation form 5. School improvement plan
<i>2. Management</i>	<ul style="list-style-type: none"> 6. Staff-related issues 7. Budget and finance management 8. Behavioural issues 9. Health and safety issues 10. Pupils 11. Premises management including restructuring 12. Assessment and examination issues
<i>3. Administration</i>	<ul style="list-style-type: none"> 13. General administration 14. Before- and after-school clubs 15. Teaching and cover 16. Travel 17. Walk around 18. Playground and lunchtime duties 19. School trips 20. Administration appeals and admissions 21. Assemblies 22. Phone calls 23. Emails 24. Newsletter etc 25. Letters 26. Diaries – basic entries 27. Reading and dealing with post 28. Special educational needs 29. References
	<i>continued</i>

Broad task group	Individual constituent activity
4. <i>External stakeholders</i>	30. Local authority 31. Network and other schools 32. Governors 33. External – miscellaneous 34. External assessors 35. Parents 36. Community 37. Social workers 38. Visitors
5. <i>Internal stakeholders</i>	39. Staff meetings and briefings 40. Personal assistants and administration staff 41. Caretaker and site management
6. <i>Continuous professional development</i>	42. Courses and conferences 43. Headteacher's own development 44. Reading and personal reflection 45. Developing other staff, mentoring and coaching 46. For externals
7. <i>Personal issues</i>	47. Personal time – breaks and lunch 48. Doctor and dentist appointments 49. Family 50. Funeral 51. Dealing with bad news 52. Unspecified 53. Travel 54. Sport
8. <i>Various tasks, unspecified time</i>	

Figure 1 provides a breakdown of the proportion of time that headteachers spent on each broad task group. It shows that, on average, headteachers who participated in the study spent nearly a quarter of their time undertaking *administrative* tasks. Within this, general administration and before- and after-school clubs were the most time-intensive areas of work, although time spent on the latter of these varied enormously between respondents.

Meeting the demands of *external stakeholders* was the second most pressing area of work, accounting for 17 per cent of time. Around one-third of this centred on networking with other schools. Governor meetings also accounted for a significant proportion of this time.

Management-based activities took up 15 per cent of time on average. Just under half of this related to the *management* of staff, although this varied markedly between individuals.

Next, *internal stakeholders* and *continuous professional development* activities each accounted for 9 per cent of the headteachers' working lives.

Finally, *strategic leadership* accounted for only 7 per cent of their daily activities. Approximately one-third (2.5 per cent) of this centred on strategic planning, with a similar amount dedicated to leadership meetings.

Figure 1: Proportion of headteacher time for each broad task group



Note: Figures do not sum to 100 per cent due to rounding

4.3 Descriptions of the day

Further information on the content and nature of the journals was provided via questioning of the participants during the face-to-face interviews and from shadowing their activities with non-participant observation. The issues that emerged can be combined into the following themes:

- demands and pressures
- responsiveness and flexibility
- people-centred issues
- management and leadership
- other issues

4.3.1 *Demanding and pressured*

A number of different aspects were combined in the characterisation of headship as being demanding and pressured. However, the most common of these centred on the long hours worked by headteachers, which was identified as a theme in 70 per cent of the cases either by the headteacher or in relation to the European Union's Organisation of Working Time (basic Directive)⁵. Directive 2003/88/EC of the European Parliament and of the Council of 4 November 2003 concerns certain aspects of the organisation of working time: every worker is entitled to maximum weekly working time of 48 hours, including overtime.

Data from the journals indicated that the participants worked an average of 52.9 hours during the period for which they provided data. There was some variation within this, with one headteacher working for 36.4 hours in one week, compared with another who worked for 105.6 hours. Half of the sample worked for between 40.6 hours and 65.2 hours during the course of the study.

In terms of gender, female participants (n=16) worked slightly longer, with an average 55.4 hours, than male participants (n=18) who averaged 50.3 hours. There were also differences in the hours worked between phases, with special school participants (n=3) working 69.7 hours, compared with 50.1 hours for their colleagues in primary schools (n=21), and 54.3 hours for those in secondary schools (n=10). However, the low number of special school participants in the study means that this finding should be treated with caution.

⁵<http://europa.eu/scadplus/leg/en/cha/c10418.htm>

There was a pattern observed across the sample of headteachers, which involved long hours during the working week (Monday to Friday), with typically one late evening meeting or event. Coupled with this, participants worked for some period over the weekend. More broadly, workloads were seen as highly demanding by around one-third (32 per cent). Similarly, days themselves were said to be “*fast paced*” by around a third of heads (32 per cent). Also, around one-third (29 per cent) saw it as stressful and draining and roughly one-sixth (18 per cent) characterised this as relentless.

4.3.2 Responsive and flexible

The sheer variety and range of their activities was the second main theme for participants. Indeed many (50 per cent) participants in the study highlighted the fact that there was no such thing as a typical day. This variety, they said, demands considerable flexibility on their part, as they seek to respond to unexpected challenges. One head noted how the activities in his day ranged from “*picking up litter to professional development discussions*”. Another noted how this variety resulted in “*a totally fragmented day, with only gaps of sanity*”. For some, this was seen as one of the main attractions of the job: “*Gruelling week, next week does not promise [that] much [will be] different. Despite this I wouldn't do anything else!*” For others, however, it represented a source of frustration.

As noted above, for a significant proportion of their working days, participants simultaneously undertook a number of tasks. For many (62 per cent), such multitasking was seen as the norm as they responded quickly to the unexpected demands of the day and sought to address the concerns of staff and students alike. In some instances (15 per cent), these demands were seen as critical and had the potential to dominate the day, blowing other priorities and schedules off track and requiring immediate attention. Such critical instances often centred on the health and safety of students and staff. Examples observed in the study included problems with student behaviour (eg the exclusion of a student with a knife), staffing issues (eg sickness and long-term absences relating to complaints and formal procedures) and issues relating to parents (eg complaints relating to bullying).

4.3.3 Personal relationships

As indicated above, a major aspect of the headteachers' jobs involved responding to the needs of others in their schools. This took a number of different forms, and related in part to the traditional concept of headship held by children, staff and the wider community. For instance, some participants (9 per cent) had unscheduled meetings with students, sent to them for things such as completing a good piece of work. In such cases, the fact that this was forthcoming from the headteacher gave it greater gravity than if it had simply been administered by a classroom teacher. Similarly, parents attending the school were often likely to ask for the headteacher, even though discussions with the classroom teacher may have been as or even more worthwhile. In this instance, it was the symbolism of the headteacher role that was critical.

Many of the dealings with staff were light and undertaken on an ad hoc, face-to-face basis as issues arose. However, interactions were often applied according to the headteachers' own leadership approaches while they sought to guide activities through subtle and generally informal exchanges.

Also, headteachers generally drew considerable support from others in their schools. For example, participants (38 per cent) showed a high level of interdependency with their administrative staff. Indeed, support staff often acted as an important filter, reducing the pressures on the head by dealing with visitors, parents and administrative demands. Personal assistants would often initially check electronic mail, responding if they were authorised to do so. Delegation of activities to other figures in their school further reduced the demands of the job for some participants. These practices served to reduce workload to a more manageable level and allowed the headteachers to focus on areas of greater priority. As one head noted:

- *You'd be crazy not to delegate. And I think that's where a lot of my colleagues are getting bogged down in that admin and data handling work – instead of being out with the children and the team where it matters.*

4.3.4 Management and leadership

As already noted, a considerable amount of the headteachers' days could be seen as dealing with the managerial aspects of the job, eg handling paperwork (18 per cent) and the development of systems

to support the completion of tasks (12 per cent). The symbolism of the headteacher role in relation to student behaviour, as highlighted earlier, was also mentioned by participants (35 per cent). Indeed, many heads also stressed the importance of visibility (having a high profile within the school), both for students and staff alike. This was evidenced by practices such as their early arrival at school and their walkabouts during break time, and at the start and the end of the day. These strategies were important as they provided opportunities for informal discussion with staff, parents and children. They also provided an opportunity for participants to model desired behaviour within the school – a frequent and important approach to establishing the ‘right’ ethos.

4.3.5 Other issues

Other issues cover a range of different things. However, the emotional nature of the job is most noteworthy. Many participants (29 per cent) demonstrated a considerable personal commitment to their work. This high-level investment meant that headship was often something of an emotional roller coaster, with marked highs and lows. Children were invariably core to these contrasting views, with considerable satisfaction coming from seeing them achieve and develop, and from simply being in their company (14 per cent). More broadly for some heads (18 per cent), the role brought enormous satisfaction, despite its challenges, a sentiment captured by one head who claimed: *“It is the best job in the world and I wouldn’t change it.”* Notwithstanding this, participants were asked about the changes that they would like to see in headship and their job.

4.4 What would headteachers change about their job?

During the course of the interview, participants were asked to identify three things that they would like to change about headship. A total of 19 issues emerged from questioning. These were reduced through content analysis to three specific issues as follows:

- accountability, bureaucracy and external demands
- capacity and support
- professional development

4.4.1 Accountability, bureaucracy and external demands

Many participants (41 per cent) identified an aspect of accountability, bureaucracy and external demands that they would like to change. The demands associated with Ofsted inspections were foremost amongst these, with preparation for inspection still seen as too time consuming and inspection itself based on a punitive rather than supportive philosophy:

- *Sometimes I feel the whole system is geared to finding the 5–10 per cent of schools who are not doing the job. The other 90 per cent have somehow got to put up with a huge amount of bureaucracy and interference and inspection. We ought to be able to say “looking at your outcomes, you're doing a good job get on with it.” If we could get the balance of responsibility and power right, that would help us a lot.*

League tables were also viewed by a number of heads as evidence of this negative approach, while at the same time increasing competition between schools and reducing collaboration. Both of these issues stem from the ERA in 1988 and have been noted in previous studies such as Day et al (2000) and Chaplain (2001).

Positively, the move towards a model of self-evaluation was seen as a good thing, but one that still placed considerable demands on schools. A further aspect of this theme relates to a perception of increased demands placed on schools by new initiatives and changes in government policy. For some of these participants, such demands, combined with the requirements of Ofsted, stifle creativity and reduce the extent to which they can innovate. Such constraints may serve to create a *homogeneous* schools base.

Governing bodies were another aspect of the current system which was seen to require modification. While governing bodies were seen by some participants to be a source of support, for others (18 per cent) they were a source of considerable work and some frustration. This finding accords with those of Chaplain (2001). Again concerns centred on the perception that time spent addressing this measure of accountability may be better spent in considering the strategic direction of the school per se.

Similarly bureaucracy and form-filling was a major source of frustration for many participants (21 per cent). Once more, many perceived these demands as excessive, particularly in instances where the requirements of individual organisations and departments overlapped, resulting in a duplication of evidence for submission. As one participant noted:

- *We were looking at the specialist bid, the [self-evaluation form] (SEF) and our school development plan, and the profile ... they're not the same headings. If they were the same headings we could cross-reference more easily and that would save time.*

Elsewhere the proliferation of emails placed greater pressures on schools and headteachers to read the latest policy document and guidance. This was felt by some (21 per cent) to be a distraction from the real priorities of school leadership:

- *All the paperwork that you have to provide in triplicate. Sometimes I open up our email and there can be 40–50 emails on there. And there's one that comes through called Schools Communication and when you actually read down it, it's around 15–16 documents to read every week. So it's that that takes the time and it takes you away from the things that you really want to do, which is focus on the children's education.*

4.4.2 Increased capacity

Participants (12 per cent) identified several different areas where greater capacity would be welcomed. Foremost amongst these was increased money available for general staffing. Here, many participants (29 per cent) mentioned administration staff in particular, highlighting how much they would welcome the support that a personal assistant could offer but feeling that current funding did not permit this. Others highlighted the benefits of having expert support in fields such as bid writing and personnel management. This finding mirrors that of Chaplain (2001) who reported that a lack of clerical support exacerbated the pressures on headteachers. Further, as Duncan suggests: 'Many headteachers are still carrying out far too much administration' (Duncan, 2006 p 3).

4.4.3 Professional development

Additional professional development opportunities were seen as important, by 18 per cent of participants, in promoting the well-being of headteachers. For instance, participants noted the value of having time away from school to reflect on the challenges of headship and to network with colleagues, recognising the rejuvenating effect of self-reflection and peer support. On this, in a study by Daniels and French (2006), one-third of respondents detailed that they were not able to take protected time (dedicated headship time⁶) away from the job.

4.4.4 Changing the culture of headship

A final area for change involves addressing aspects of the prevailing culture of headship. At the heart of this was a desire to move away from heroic models of leadership towards a culture where leadership is shared more broadly across the school, with 18 per cent of participants supporting such change:

- *Heads are important, I don't deny that for one second, but there is something about the leader, the figurehead which I don't think is very helpful. It's at odds with the notion of shared leadership. Politicians do it all the time. "We've got to give more power to headteachers, let headteachers get on with the job." It's almost about "... can you share leadership?" I don't mean just job-share but can you share the leadership?*

4.5 Which elements of the job offer most reward and satisfaction?

Participants raised 19 issues from a wide range. Those rated highest in terms of reward and satisfaction were:

- being child centred (82 per cent)
- developing good relationships (50 per cent)
- achieving things (50 per cent)

The 19 issues were reduced through content analysis into the following 3 key themes:

- development of others
- the nature of the job
- personal relationships

⁶www.tda.gov.uk/remodelling/nationalagreement/headshiptime.aspx

4.5.1 Developing others

Over three-quarters of participants said that seeing children progress, develop and succeed was one of the most rewarding parts of their job (82 per cent). As one participant explained:

- *Simply having the children here, seeing them succeed and prepare to be citizens of the 21st century is really rewarding. To see them go home at the end of the day and they've really learnt something that they couldn't do when they arrived is really good.*

In this, the opportunity to teach was seen as offering a high degree of satisfaction and reward: *"It's about the joy of sharing knowledge and learning."*

Equally, working alongside children, interacting with them at breaks and observing them in lessons were seen as an important and satisfying part of the role. This was expressed by one participant in the following way:

- *Driving to school in the morning – I look forward to coming to work – I don't wake up on a Monday and think "oh no, I've got to go to work". I thoroughly enjoy what I do. I enjoy going on the playground in the morning and meeting the children, sitting down together and sharing pupils' achievements, reading their reports, taking a group of kids swimming and seeing them succeed without arm-bands on, succeeding in learning a musical instrument, performing in a production in school.*

As well as developing children within school, supporting teachers and staff was rated by almost half (47 per cent) of the participants as providing a high degree of reward and satisfaction – both personally and professionally:

- *It's empowering people to go and do it, and I think this is a very empowering environment and you're pushed to develop yourself as well as the children in your care. And that really is one of the buzz factors in this job, that you're in a position to be able to do that to people.*

Another participant commented: *"I get as much pleasure in developing staff as I used to in teaching children."*

One participant felt that providing training for governors was particularly rewarding whilst for others (12 per cent), the opportunity to support colleagues within the system was equally rewarding, with one head saying:

- *Something I really enjoy is the work I do as a primary strategy consultant. I get great satisfaction from helping other heads, listening to their concerns, helping them to develop ways forward.*

These outcomes – children, staff and governor education – relate to Mercer’s category ‘having a positive view of the quality of education provided by one’s school’ (Mercer, 1997).

4.5.2 The nature of the job

Half of the participants (50 per cent) indicated that they extract a high degree of reward and satisfaction from “*achieving things*”. For some being busy (6 per cent), engaging in a variety of tasks (9 per cent), resolving issues (9 per cent), and having high levels of autonomy and control (12 per cent) contributed to their satisfaction:

- *... it’s like being a film director – you have the world in microcosm, you have the power to play with all the pieces.*

Certain participants welcomed the wide variety of tasks they engaged in as a means of ensuring that they would never become bored and regarded the pace and unpredictability of the job as both challenging and enjoyable.

For over a third of participants (35 per cent) leading the strategic direction of the school and school improvement was seen as being especially satisfying and rewarding. These issues also align with the findings of Mercer and his categories of ‘being able to control one’s environment’ and ‘being comfortable with one’s role’ (Mercer, 1997).

Around a quarter of participants (24 per cent) stated that receiving positive feedback was rewarding and satisfying. In this, praise from parents was mentioned by a number of heads, whilst others included receiving external praise from Ofsted.

Many participants (26 per cent) commented that having a moral purpose provided a degree of reward and satisfaction, as one participant put it:

- *... liking what I do and thinking the work the [headteacher] does is important work, this makes me think what I do is worthwhile, this increases my sense of well-being.*

4.5.3 Personal relationships

Half of those interviewed (50 per cent) felt that good relationships were important when considering the most rewarding and satisfying elements of the job. Staff relationships were seen to offer high levels of reward and satisfaction here. Indeed, a number of heads indicated the additional importance to them of good staff relationships during difficult times, suggesting that sometimes the best bits of the job are also closely associated with the worst bits of the job, for example:

- *The best bits of the job, for me, are sometimes very closely associated with the worst bits. It's frequently in the crisis that you see the strength of the people that you work with.*

Also, several participants regarded their senior leadership teams as being especially important to them in terms of support and comradeship. As one explained:

- *Having a good team of people to work with is a real strength. They are very resilient people and extremely caring people. Whatever is thrown at them, they'll pick themselves up and go again, and that is admirable.*

What is more, support received from staff extended into personal lives, for example, one participant commented how well she had been supported following the recent death of her mother.

Relationships with pupils' parents were also important for participants (15 per cent). Those who responded said that they enjoyed parental contact such as meeting and greeting in the morning, resolving parental issues, welcoming parents to the school and being able to show off the positives. These findings again serve to confirm those of Mercer who details that 'having good relationships with others' is an element of job satisfaction in headship (Mercer, 1997).

Contributing to and being valued by the local community also offered a level of reward and satisfaction for some (21 per cent), as did networking (12 per cent):

- *... being out of school, networking with colleagues is useful in personal support, gaining news etc. This is also a good way of recharging the batteries.*

4.6 Which elements of the job offer least reward and satisfaction?

When asked the question ‘which elements of the job offer least reward and satisfaction?’, participants raised 24 issues from a wide range. Of the issues raised, those rated highest in terms of offering least reward and satisfaction were:

- negative staff issues (74 per cent)
- parental issues (44 per cent)
- bureaucracy (38 per cent)

The 24 issues raised were grouped through content analysis into the following 4 key themes:

- internal resources and contextual issues
- child- and learning related
- external demands and bureaucracy
- others

4.6.1 Internal resources and contextual issues

Internal resources and contextual issues included a range of categories from the physical conditions that heads worked in, from vandalism and inappropriate learning environments to insufficient budgets and negative staffing issues.

Over two-thirds of participants (74 per cent) expressed the view that negative staff issues contributed highly to least reward and satisfaction in the job. These issues fell loosely into two categories: those relating to organisational or management issues and those relating to relationships. Of the former, the most significant were restructuring and Teaching and Learning Responsibility Payments (TLRs)⁷, supply cover issues and staffing cuts and resignations. Relationships predominantly focused on providing difficult and negative feedback to staff and dealing with competency matters:

⁷www.teachers.org.uk/resources/word/TLR-NUT-Reps-guidance.doc

- *For me, the lowest points of the job are obviously to do with people. Internal applicants applying for jobs that they do not get: I find it very difficult to deal with. ... You want to say “this is not saying that you’re useless at your job, but there was actually somebody who was a stronger candidate than you” and in the interests of the school you have to appoint the strongest candidate.*

This finding has been reported by previous studies (Carr, 1994, cited in Pashiardis and Tsiakkiros, 2004; Ostell and Oakland, 1995, cited in Pashiardis and Tsiakkiros, 2004; Chaplain, 2001) and would therefore appear to be a consistent problem for some. In this, the issue is worthy of further attention by researchers and those charged with the development and well-being of headteachers.

A number of participants indicated that the feeling of being let down by colleagues had a negative impact at a personal level, and on their role as headteacher. Participants detailed that they thought these staff were less than fully committed to the school, had low expectations of pupil achievement, and were unenthusiastic and underperformed. For some, dealing with these issues was felt to be both time-consuming and draining:

- *Members of staff who could give more but don’t. Perhaps I came into this job with a different approach than they did – I wanted to be seen to be successful. It’s not just about career motivation but about personal success. I’ve got younger members of staff who don’t do any extra curricular activities, who do the bare minimum and then go. Even through performance management one-to-ones, professional discussions, you can’t insist that these things happen.*
- ... competency issues with staff suck your attention and reduce your impact as a head elsewhere.*

4.6.2 Child- and learning related matters

Parental matters and pupil behaviour were the two most significant issues raised here, for example trying unsuccessfully to help and support students and matters relating to attendance and child protection issues.

Under half of the participants (41 per cent) felt that negative parental issues added to the tensions of school life and offered little reward or satisfaction. In particular, unrealistic and differing expectations by

parents, the aggressive behaviour of some parents and the lack of support for the work that the school was doing were detailed. One participant summed it up by saying:

- *Sometimes days can be full of issues relating to parents. These can be a major source of stress:*
 - *unreasonable behaviour, ie just being awkward and difficult for no good reason*
 - *not responding to communications or just ignoring things*
 - *having low expectations of children*
 - *not backing the school up on issues, ie: "Who is she to say that to you? You don't need to listen to her"*
 - *displaying attitudes and behaviours that contradict those promoted by the school, eg in relation to racism*

These external conflicts and complaints were reported by Ostell and Oakland (1995, cited in Pashiardis and Tsiakkiros, 2004) and, with a growing parental involvement and external focus, may be on the increase for schools and headteachers. This may also be an issue for greater attention by those involved in headteacher development and well-being.

Almost a third of participants (32 per cent) regarded pupil behaviour as being an issue for them. Those who elaborated here tended to focus on exclusions, violent or aggressive behaviour and bullying by pupils. One participant expressed concern about the ongoing challenge of pupil behaviour and its potential impact on teachers, pupils and school culture. Another expressed feeling a sense of failure at having to resort to excluding a child in the following way:

- *[Exclusions are] the bits that I like least and find hardest ... you feel you've actually failed. Our policy is to try to keep kids in school at all costs – however difficult they may be, however challenging their behaviour. There's a law if you've got to go to the governors and say we don't want this pupil in our school any more.*

4.6.3 External demands and bureaucracy

Over a third of participants (38 per cent) felt that demanding and relentless bureaucracy including government initiatives, accountability and paperwork contributed to the pressure and imbalance in their working lives. The volume and frequency of government initiatives were seen to impact negatively upon headteacher workload and staff morale:

- *Over the last two or three years, more is being put onto our plates. The job is never finished. You have never finished what you need to do at the end of the day.*

Similar demands were reported by Wilson (2002) and Daniels and French (2006).

Some participants (26 per cent) expressed a lack of support by government, particularly in relation to data collation:

- *You saw when you were here the trouble we have been having entering data about our school profile. There didn't seem to be anyone at the DfES who knows what to do. I kept getting passed from one person to the next. We have managed to sort it out but the number of hours I spent on this you wouldn't believe.*

Further, the accountability of headship and the target-driven culture of schools were seen by some participants (12 per cent) as offering little reward and satisfaction in their work.

Interestingly, participants did not indicate that targets and accountability measures should be withdrawn completely but rather that the reliance on narrow quantitative measures should be supplemented by broader and more diverse qualitative measures. As one head put it: *"I wish bureaucrats could see that whilst results are important, schools are more than that."*

Paperwork plays a significant part in the working lives of participants and some participants (26 per cent) stated that this adds little value to the life of the school.

Lastly, excessive demands hinder the ability of some participants (18 per cent) to prioritise their work, intrude on family life and create pressure:

- *Too much to do, can't do it all, have to prioritise but always aware of what you're not doing. Sometimes you just have to think "right, what's today" and you can't think about tomorrow until that's done.*

On this note, the findings of the present study again support those of Mercer (1997) who suggests that the context within which schools operate can adversely influence job satisfaction.

4.6.4 Others

Some participants (6 per cent) felt that waiting for decisions to be made, for example, about school re-organisation, specialist status and a submission to Building Schools for the Future (BSF)⁸ was frustrating and unrewarding. Dissatisfaction was also expressed at having to work during the holiday (12 per cent) and having insufficient time to relax and have lunch (9 per cent).

4.7 What contributes to a positive work–life balance?

Participants raised 23 issues in response to this question. The issues illustrated the following four key themes:

- health and hobbies
- family, friends and personal support
- strategies for managing work
- personal philosophy

4.7.1 Health and hobbies

Many participants (41 per cent) listed activities based on maintaining health and fitness. In particular, one spoke of her use of alternative therapies (both acupuncture and reflexology) as a way of finding a balance. Increased exercise for one head had been highly beneficial in improving energy levels and reduced tension. Another explained that *"it is important to have a wide range of experiences"*, referring to reading, going to the theatre, and playing golf. Other activities mentioned by heads included going to the gym, going to church, motorcycling, gardening, genealogy, walking, horse riding, photography, holidaying, skiing, potting, painting, needlework, reading and watching football. One pastime that was mentioned by several participants was music. One mentioned that playing the piano was relaxing while another spoke of music playing in the office and around the school to create calm.

⁸www.bsf.gov.uk/

4.7.2 Family, friends and personal support

The support of family and friends was seen by many participants (65 per cent) as being an important factor in maintaining a good work–life balance. On the subject of long hours, one participant commented that he had a supportive and understanding wife who accepted long hours as an inevitable consequence of his job. Another stated that:

- *... family life is the guardianship of work–life balance. It's a solid partnership, a friend who I can talk through things with.*

The support of friends also contributes to work–life balance. For example, one participant is part of a faith home group whose members are drawn from a variety of backgrounds. The group meets to consider the challenges that they are facing individually and to offer advice and support. Others relax by going out, having a broad social life with a range of friends and by having effective systems to ensure the family and home run smoothly.

Supportive networks of colleagues were viewed as positively contributing to work–life balance by some participants (12 per cent). Of this, one participant said:

- *Family is very important to me, but at work it is undoubtedly the quality of colleagues. Shared senior leadership has a huge advantage. When things go wrong you are still sharing it. They're there advising and supporting. Whenever important decisions are made, we always reach them collectively.*

For other participants (47 per cent), support networks include governors acting as critical friends, local authority link inspectors and administrative staff as well as networks of colleagues outside their own schools. For some, cluster arrangements provide support and help to address isolation whilst for others, support is obtained by networking with other headteachers in whom they can confide.

4.7.3 Strategies for managing work

This third grouping is based upon planning and approaches to completing work. Firstly, some (26 per cent) stated that they maintain a positive work–life balance by effectively prioritising, recognising that the school cannot do everything and focusing on those things that are most likely to improve learning. As one participant put it:

- *We've got the confidence with government initiatives to take it or leave it ... we've become good at filtering, not allowing government initiatives and bureaucracy to wear us down.*

Other key strategies, detailed by 59 per cent of participants, include the use of school diaries, notebooks and logs. For one participant, this involves everything including going through the school diary, which, despite creating lots of staff traffic ensures that she knows exactly what is going on in the school. Shared diaries with secretaries, parental logs and 'week beginning' sheets are some of the other organisational strategies deployed to ensure efficient and effective management:

- *I reflect at the end of the day about what I have done and what needs to be done tomorrow and in the morning the first thing I do before leaving home is to check what I hope to do during the day – my lists and things like that.*

These strategies, it was said, also support short- and long-term planning:

- *Being very organised and planning ahead is the key to successful headship. Taking the time to plan the leadership aspect of the role is critical. Being in control reduces the sense of pressure.*

In relation to planning ahead and job satisfaction, a participant detailed that: *"It's really important to think ahead. You would easily lose job satisfaction if you jumped from crisis to crisis!"*

Further, for many participants (24 per cent), planning ahead enables the efficient use of time and resources. Some plan their travel time and use it as an opportunity to reflect, others regularly take time out to engage in strategic thinking. In particular, one participant spends his Fridays away from the school site to avoid interruptions. In this way he achieves a balance within his working life between day-to-day duties and the strategic side of his job.

Implementing rules and limits on workload and working practices was mentioned by just under a third of participants (32 per cent). Whilst some admitted to going into school at the weekend and preparing for Ofsted over half-term, others spoke of working late during the week, sometimes until 7pm in order to get things done and ensure that their weekend is free. One participant however pursued a very different strategy by specifically:

- *coming in early but rarely taking work home*
- *not coming in during school holidays apart from examination week and one day during half-term*
- *ensuring that the weekly senior leadership team meeting finishes by 5pm*
- *ensuring that meetings last no more than an hour and are only arranged if absolutely necessary*
- *going to gym and encouraging others to do the same*

Many participants (50 per cent) detailed that they strike a balance by delegating effectively. Of distributing leadership responsibility, one said:

- *There are very few bits of the job I do without consultation or discussion with the deputies. I could be out of the school for a week and the deputies would probably run the school just as well as I do, if not better. They would know exactly what to do, dealing with individual children, teachers, personnel issues, parents; they would do all of that. The bit that is harder to do is the headteacher as the link with the outside world. The external world sees the headteacher as the conduit, the figurehead. A lot of the responsibility is shared, but the figurehead bit is difficult to share.*

This comment was mirrored by others who said that it was crucial to have people on the senior team they could trust. In addition to delegating responsibility to staff, some suggested that handing responsibility to expert external service providers was another means of delegating effectively. On this, one participant said:

- *I've been into schools where I've seen headteachers fixing the taps. There is so much that only you can do – somebody else could fix the taps! It's about doing the things that take your training and understanding and experience ... that only you can do. People can easily take you off task.*

4.7.4 Personal philosophy

This grouping covers individual personal philosophies. Half of the participants (50 per cent) suggested that these philosophies enable headteachers to maintain and sustain a sense of work–life balance. On this, one participant suggested that it is about one’s mental attitude and training oneself not to become stressed. A further dimension of personal philosophy was that of religious beliefs. As a practising Christian, one participant felt that it was his strong faith that sustained him in difficult times. Another Christian participant stated that her headship is based on vocation and mission, rather than it simply being a job. This was an important source of sustenance for her in the early days of her headship, about which she said:

- *... faith is number one, even above ... family because I know that I am here for a purpose. And my first three years here were an absolute nightmare. There were incredible difficulties. I had really difficult staff and there were times when I’d go home and cry and think “why am I doing this job?” But I knew in my heart that it was where God wanted me to be and I carried on.*

Further, having the experience and confidence to be realistic about the expectations of others and about one’s own limits provide some participants with the ability to switch off and prioritise:

- *If you’ve been in difficult situations before, you know that you’re going to come out of them. It’s not the end of the world and the school will be here tomorrow. The teachers will be here and the school will continue even if it feels like the world is crumbling around you.*

Whilst for others, successful leadership requires hope and forgiveness and the “*ability to dust yourself down and get back on your feet when you have been knocked back*”. One participant explained that he no longer felt guilty about leaving before teachers but rather used it as a way of removing the long-hours culture. Related to this is the idea of protected time, which was mentioned and used by some participants (29 per cent) to create time for themselves and their families. Others spoke of protected time during the school day, for example making sure that staff all sit down together at lunchtime to eat.

Linked to religious beliefs is the idea of a moral purpose and personal values. Many participants (21 per cent) felt that making a difference to pupils' lives helped to both drive and sustain them.

Lastly, for many participants (47 per cent) having a positive outlook and a sense of humour is felt to sustain a positive work–life balance.

4.7.5 Poor work–life balance

On asking participants about creating a positive work–life balance, approximately 15 per cent offered that they did not strike a balance, with one saying that his work–life balance was “*rubbish*” with periods when it is “*absolutely appalling*”.

4.7.6 Coping strategies

Under the themes from this section, it is evident that participants employed a range of specific strategies that enable them to cope with the demands of their role. These strategies are commonly described as ‘coping strategies’ and ‘fall into two main types: *direct action* techniques and *palliative* techniques’ (Kyriacou, 2001 p 30). *Direct action* techniques refer to the elimination of stress, which involves getting a clear idea of the source of the stress. Once this has been established, changes can be made to a person’s role or environment to ensure that the stress does not re-occur. *Palliative* techniques do not deal directly with the source of the stress but instead seek to reduce the feeling of stress in an individual (Kyriacou, 2001). In reality, the strategies employed by the participants (table 5) are a mix of both direct action and palliative techniques.

Table 5: Coping strategies employed by participants

Health and hobbies

- activities based on maintaining health and fitness – alternative therapies, visits to the gym or church, music, gardening, walking etc

Family friends and personal support

- networks of friends and colleagues – opportunities to be open and honest

Strategies for managing work

- planning and prioritisation – eg reflecting at the end of day and prioritising what needs to be done the next day
- use of diaries, notebooks and logbooks
- planning ahead in order to make full and effective uses of resources and time
- implementation of specific working practices
- effective delegation and distributed leadership

Personal philosophy

- mental attitude and ability to switch off
- faith and religious beliefs
- sense of moral purpose and personal values – making a difference
- escaping from the job – holiday cottages, staying with family and holidays
- being realistic about expectations and own limits
- protected time for themselves

Sense of humour and positive outlook

4.8 What hinders work–life balance?

Participants raised 19 issues in response to this question. The issues illustrated the following five key themes:

- pressure of work demands
- paperwork
- lack of opportunities for delegation
- need for control
- staff issues including unionisations

These themes are presented in greater detail below.

4.8.1 *Pressure of work demands*

This was an issue for over one-third of the sample (38 per cent). For one participant, accountability and external pressures revolved around the pressures of standard attainment tests (SATs)⁹. Others listed accountability issues such as Ofsted, health and safety and Every Child Matters (ECM)¹⁰.

4.8.2 *Paperwork, lack of opportunities for delegation and a need for control*

Some participants admitted to being too much hands-on with administration, feeling accountable and unable or unwilling to delegate these tasks (9 per cent).

One participant suggested that it was easier to take on administrative tasks rather than delegating these activities to others, offering this explanation:

- *Research shows that if you delegate work, you have to expect 80 per cent of the quality that you would have achieved yourself but you need to give people the opportunity to ... develop and I recognise that. However, [I] like to make sure that things are done to 100 per cent quality so [I like to do them myself] rather than get 80 per cent quality. I know that's not good and [it's something I am] trying to work on. I'm a bit of a perfectionist, I like things tight and correct, not sloppy and half-hearted and it's got to be right. When you are dealing in the day-to-day with pupils' lives and their futures, you have to get it right.*

For some participants (12 per cent), it was important to feel in control, for example checking through documents from meetings and

⁹ www.direct.gov.uk/EducationAndLearning/Schools/ExamsTestsAndTheCurriculum/ExamsTestsAndTheCurriculumArticles/fs/en?CONTENT_ID=10013041&chk=iP4twF

¹⁰ www.everychildmatters.gov.uk/

arrangements for school trips. For others, they were sometimes drawn into external things which seemed exciting at the time, but which ultimately only added overload to an already burdened agenda.

These findings are revealing and serve to augment the breakdown of activity by broad task group. The findings of this study reveal that some headship behaviour around delegation, or a lack of delegation, is deliberate, whilst findings from a previous study indicate that some headteachers have a problem in planning their workload (Daniels and French, 2006).

4.8.3 Staff issues including unionisations

Staffing issues featured prominently in the responses to this question with 12 per cent of participants citing unionism, absenteeism, competency and demands around sensitive child–parent issues hindering work–life balance. In particular, one spoke about a conflict between parental and professional views of learning priorities, saying:

- *... parents today feel they are consumers and that the school should meet their needs; they have their own agenda and this often [involves] them putting their children under pressure.*

4.8.4 Other

Insufficient support was also raised by participants (9 per cent) as contributing to a lack of work–life balance. On this, some participants felt that there should be:

- *... special recognition of new heads: in those first two or three years, the expectations on a new head are phenomenal. You have to be so proactive to learn about your school and about the job. This can apply to even a second-time head.*

4.9 Three things to improve work–life balance

Participants raised 24 issues from a wide range in response to this question. The issues illustrated the following key themes:

- administrative support
- delegation
- reduced dependency on the head
- improved professional development
- reduced working hours
- dedicated leadership time

These themes are presented in greater detail below.

4.9.1 Administrative support

For a number of participants (21 per cent), an increase in the level of their administrative support would improve their work–life balance. For others, the desire is for more teaching cover or additional leadership posts. Both of these issues are closely linked to the desire for a bigger budget: as one head put it, *“a bigger budget to recruit more staff to take things off [me]!”*

4.9.2 Delegation

Over a quarter of participants (18 per cent) said that their work–life balance would be improved if they changed their approach to delegation and distributed leadership, with one suggesting that there is a need to *“take [my] hands off and let others make decisions without [my] approval”*. Another participant summed this up as needing to reduce the culture of reliance amongst staff and introducing effective remodelling to promote the delegation of work.

4.9.3 Reducing dependency on the head

Associated with the points listed in the previous section is the employment of an area-based strategic view of premises, eg the management of provision for information and communications technology (ICT), fire, buildings and health and safety. This was suggested by 18 per cent as a further way of reducing the dependency on the headteacher and facilitating work–life balance.

4.9.4 Improved professional development

A further suggestion, by 15 per cent of participants, was that professional development might require a re-think, with the potential for alternative pathways. For example, one participant said:

- *I really enjoy ... the work as a primary strategy consultant. I get great satisfaction from helping other heads, listening to their concerns, helping them to develop ways forward.*

Compulsory sabbaticals and headship secondments were also suggested.

4.9.5 Reduced working hours

The reduction of headteachers' working hours was mentioned by several participants (15 per cent) as a means of fostering a more effective work–life balance. Participants included suggestions for capping the hours that heads can work as well as suggesting that heads need to develop an ability to say 'no' and managing their time more effectively:

- *If I think something's a waste of time, I don't do it. I haven't got time to hang about while other people try to get things right. I'm quite happy to say "this isn't for me" and be off or think "I'm not going to come to this next time".*

4.9.6 Dedicated leadership time

According to 15 per cent of participants, allied to the issues of effective time management is the need for dedicated leadership time, for example finding time in the day when heads can work on strategic issues. One participant highlighted that *"for teachers, things have improved; why can't the same thing happen for heads?"*

4.9.7 Other

Other issues mentioned included the swifter resolution of staffing issues (3 per cent), particularly a quicker way of dealing with underperforming teachers, and increased support from government in relation to Ofsted (3 per cent), with one head saying he would *"like to see Ofsted in a much more developmental role"*.

Changes to the school year were seen by a couple of participants (6 per cent) as offering potential benefits by enabling heads to pace themselves over equal terms and avoid the exhausting autumn term.

➔ 5. Conclusions and implications

5.1 Existing headteacher practice and the future of the role

The current study reveals much about the practice of headteachers and offers suggestions from heads themselves about the future of their role. Both of these factors are salient with regard to the succession challenge that the profession is currently facing. This challenge is in large part resultant from the impending retirement bulge but it is exacerbated firstly by a failure to retain headteachers, who may leave early through ill-health or take early retirement. Of this, Mercer says:

- *There is an urgent need to identify the reasons for the trend towards early retirement and to put in place professional and personal support structures which might prevent this haemorrhage of experienced headteachers.*

Mercer, 1997 p 280

The succession challenge is compounded by negative perceptions of headship that exist within the ranks of middle and deputy leaders, which stigmatise it as a job which is relentless, with long hours and endless bureaucracy.

However, it is evident from this study that, despite these issues, for some it is still the best job that they could carry out: indeed some look upon it as a vocation. This dedication will go some way to delivering retention in the profession and such individuals may positively influence those coming up through the ranks. Notwithstanding this, the current study offers an insight to the various positive and negative perceptions of the role that exist in today's population of headteachers. An illustration of this variety and, in some instances, polarisation is that, for some participants, the least rewarding and most challenging aspects of their work – the variety, complexity and accountability – are the very things which others find most rewarding. Why should this be?

It could be argued that context, experience or personal outlook contribute to this but this is not always the case as participants in similar contexts and with similar experience perceive their roles very differently. The majority of those who detailed that they relish the challenges and enjoy the variety of the role were more often those who had effectively *distributed leadership* across and within the school, who

could *prioritise their personal and professional lives, could deal confidently and comfortably with negative staff, parent and pupil issues, who fostered and were part of supportive networks or collaboratives and who had a positive and active life outside school.* These practices are by no means exhaustive and they were not necessarily present in full, but they are ways in which headteachers ensure their well-being and job satisfaction.

Allied to the issues outlined so far, the findings also demonstrate that, for some participants, a healthy work–life balance is achievable, whilst for others it is not, despite similar demands, workloads and pressures. The key coping strategies identified in this study offer us insights into how and why some headteachers achieve a work–life balance. In this, some participants were, in many ways, courageous headteachers prepared to make difficult choices and brave decisions that were ultimately in the best interests of both themselves and their schools. However, questions remain as to why it is that some participants have not developed coping strategies that would enable a work–life balance. Is this a specific development need for some or do conditions prove to be obstructive despite their attempts?

The findings from this study provide some of the answers and it is by looking at these that we may reveal some of the implications for headteachers, their schools, and agencies at a local and national level. The first key finding, as detailed above, is in respect to distributing leadership tasks and responsibilities.

5.1.1 Distributed leadership

The distribution of leadership requires headteachers to be able to delegate leadership to others, albeit within a framework of accountability and clear roles and responsibilities. The emergence of new models of headship, such as federations and co-headship, offers the opportunity to consider innovative and flexible ways of distributing leadership. For a number of participants, the senior leadership team, to whom leadership responsibility and accountability had been effectively distributed, provided them with comradeship and support and offered a high degree of job satisfaction and reward. Administrative staff also played a key role in those schools where leadership was effectively distributed, by undertaking many of the administrative and day-to-day tasks which other participants undertook themselves. For some headteachers, this may be a decision they are unwilling to take for fear of losing control and or a potential fall in

standards, an issue that may be exacerbated by the pressures of Ofsted and league tables. However, it may also be that some headteachers are simply unsure about how to address the distribution of leadership and to develop it within their school.

It would seem appropriate that the issue of distributed leadership and how to develop and engage in it should be given a renewed or higher profile within current and future leadership programmes. Local authorities are well placed to address this issue at a more direct level with networks of school leaders and individual headteachers with whom they work. Notwithstanding, it could be argued that the concept of distributed leadership has tended to focus on what distributed leadership is and what the benefits of distributed leadership might be, rather than focusing on how you actually go about developing it in schools. The authors would suggest that now is the time to re-emphasise the importance of distributed leadership and, more importantly, provide further guidance and support for those leaders who wish to develop it within their schools.

The evidence from this study would suggest that headteachers who successfully distribute leadership within their schools will be in a better position to take control of both their lives and their work, enjoying the challenges and variety of the role.

5.1.2 Prioritise personal and professional lives

A number of participants kept a clear focus on strategic leadership, finding time to think and reflect by delegating and prioritising their work effectively. In doing so, they created an effective work–life balance and positively contributed to the strategic direction of their schools.

As outlined above, distributed leadership supported the ability of some participants to prioritise by freeing them from much of the organisational, managerial and day-to-day routines and practices in which others engaged.

Key roles were played by senior leaders and administrative staff, whilst others employed specific tools such as the use of diaries or daily lists. Feeling comfortable and confident about saying ‘no’ also played a fundamental part in the ability of participants to prioritise their work, in particular, the ability to say ‘no’ to the demands and needs of others within the school. For others, saying ‘no’ was closely associated with a feeling of guilt.

This would indicate that there might be a need to change the perceptions of staff and parents in terms of the demands they place upon heads. But equally there is a need for heads themselves to demonstrate and make clear the limits of expectations. In addition, the development of specific strategies for prioritising work should be further explored and shared with school leaders, alongside coaching and mentoring opportunities and interpersonal, negotiation, time-management and organisational skills. Providers of leadership development programmes should consider the stage of leadership development at which these specific training opportunities would be most appropriate. Equally, a number of these training opportunities would provide a suitable focus for networks of colleagues to undertake collaboratively.

5.1.3 Deal confidently and comfortably with negative staff, parent and pupil issues

For a number of participants, dealing with negative staff, parent and pupil issues proved stressful and unrewarding. Undertaking difficult conversations and giving negative news to colleagues were seen as being particularly stressful, alongside dealing with negative parental views and pupil behaviour-related issues.

It would therefore seem sensible to include appropriate training for interpersonal, negotiation and feedback skills to headteachers, at national or local level. Within this, there is also a need to equip headteachers with the confidence to take control of these exchanges and see such situations as creative challenges.

5.1.4 Supportive networks and collaboratives

According to many participants, networks and collaborative ways of working, both personal and professional, offer a high degree of support. They help to cope with the everyday pressures and issues of school life and ultimately achieve a better work–life balance.

Being able to network with colleagues who have an external and objective perspective would seem to be as effective as networking with friends and family. Participants in this study engaged in various networks, including faith groups, networks of colleagues outside their own schools and networks that included local authority link inspectors and governors.

Many participants said that sharing the challenges and concerns, as

well as the joys, of headship with colleagues offers the chance to work through the issues in a supportive and confidential setting. This sharing often helped to reduce the feelings of isolation that many heads experience.

Increased opportunities for headteachers to engage in networks, and the likely benefits, should be highlighted, fostered and encouraged by all those who work with headteachers, including local authorities and those engaged in providing leadership development programmes.

5.1.5 Positive and active life outside school

Diaries often painted a picture of long hours, complexity and accountability with little time left at the end of the day or during weekends for other things. However, for some participants, the picture was very different, with heads participating in numerous hobbies and interests and regular health and fitness activities and spending time away at weekends. These participants were aware of and prioritised time for pastimes and activities that provided a mental as well as sometimes physical change from school life and enabled them to keep a balance, recharge their batteries and re-energise themselves.

Not unsurprisingly, these tended to be the headteachers who often had effective organisational systems and processes in place, who had distributed leadership within the school and who were able to prioritise their workloads.

An increasing number of headteachers are now offering practical strategies to support the well-being of teachers. For example, a school has recently undertaken to provide a free ironing service for staff, whilst another is offering relaxation and alternative therapies. This is an area of school life that has the potential to make a large and effective difference to work–life balance, and yet it is one that has received limited recognition or attention.

The possibilities to think creatively about the opportunities should be grasped by all those involved in the provision of leadership development and by headteachers themselves.

Headteachers have a crucial role to play in this area through role modelling and leading by example. Taking time for personal as well as professional interests and pastimes, making time for holidays and breaks away and being seen to leave school early at some time during the

week sends positive messages to others within the school that it is alright for them to do the same.

Providing in-house relaxation and exercise opportunities might be a first step to achieving a good work–life balance for all staff as well as indicating to staff that they are highly valued and important members of the school community.

The implications outlined above are not insurmountable. Indeed, in many ways, they would appear to be relatively easy to address given a little focus, collaboration, and sharing of expertise and knowledge amongst relevant providers of leadership development opportunities and headteachers themselves.

However, underpinning these implications are a number of bigger, system-wide issues that would need to be considered and addressed at a wider local and national level.

When asked what participants would change about their jobs, they cited accountability, bureaucracy and external demands, capacity and support, and improved professional development.

It is debatable, in the light of these findings, whether additional capacity, for some headteachers, would make a significant difference to their working lives. Headteachers who are unable or unwilling to delegate leadership would be likely to face similar issues of capacity irrespective of the number of additional staff.

However, there are issues that warrant further attention: the volume and frequency of government initiatives, which were seen to negatively impact upon headteacher workload and morale; the amount of paperwork and forms that are needed to be completed by schools; and the levels and types of accountability faced by heads.

A number of participants talked of the need to duplicate information for different plans, bids or profiles and offered a simple solution of using the same headings which could then be cross-referenced more effectively. Initiatives and developments of this nature could be effectively addressed by continuing to bring headteachers and school leaders together with policy-makers and national organisations to review current practices.

The frequency of initiatives is another area that needs to be addressed at government and national level but which could again be informed by headteacher and school leader involvement.

The accountability of headship and the target-driven culture of schools were seen as offering little reward for heads. Yet interestingly, heads did not suggest that accountability measures and targets should be withdrawn completely, but rather that the reliance on narrow, quantitative measures be supplemented by broader and more diverse qualitative measures. This may, to some extent, be addressed by the school's self-evaluation process but it is nevertheless an area for further discussion, by headteachers themselves and at local and national level.

Issues of improved professional development included the potential for secondments and opportunities to engage in system leadership. Opportunities to engage in professional development do exist however. For example, system leadership opportunities include consultant leaders, school improvement partners (SIPs) and national leaders of education (NLEs). Secondments could be negotiated with governors and local authorities, and research grants and fellowships can also be sourced by headteachers. It may therefore be simply a case of making school leaders more aware of the potential opportunities available to them whilst, at a national level, considering further, more protracted opportunities in recognition of length of service and/or achievement.

5.2 Future research

Conducting this study has reinforced the urgent need for further empirical research into the ways in which contemporary headteachers carry out their role. This would allow the specific and complex relationships between well-being, stress, job satisfaction and work–life balance to be thoroughly explored and understood. For this, researchers might explore the balance between the roles of leading professional and chief executive, as well as the new models of headship including co-headship, federations and executive headship.

Alongside traditional and evolving models of headship, researchers may wish to explore the expansion and diversification of skills and responsibilities that heads are facing as they adopt additional responsibilities and new roles, for example in multi-agency settings and when addressing the ECM agenda. Allied to such an increase in responsibility is the need to focus on the management of workplace pressures faced by headteachers, with specific causes of stress and job

satisfaction. Future research may focus on the relationship between stress and job satisfaction, as this study and previous research (Pashiardis and Tsiakkiros, 2004) identifies that there is an urgent need to address why being a headteacher can be simultaneously pressurised and satisfying.

Literature indicates scope for further empirical research into variables such as the sex of the headteacher and their level of experience, and perceptions of the role. This study considered these variables but found few noteworthy trends within the data. Future studies should therefore explore such variables utilising a larger sample and potentially a quantitative methodology.

The overall finding from this study is the need for further empirical research into the specific characteristics of current headteachers' perceptions of their workloads, well-being and job satisfaction. This would enable NCSL and other agencies to provide focused support for headteachers by providing bespoke leadership development opportunities. In addition, it is only through activities with headteachers in a variety of contexts and phases that a clearer understanding of the issues surrounding recruitment and retention can be found.

Ergo, NCSL will conduct a quantitative, large-scale follow-up study to explore these issues with a focus on the variables outlined above.

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Appendices

➔ Appendix 1

Journal instructions and example journal page

Journal

As part of this project, we are asking all participants to keep a journal for two weeks in order that we are able to understand what a working week looks like for a headteacher. We also hope that the journal will provide participants with an opportunity for self-reflection.

Completing your journal

We would like you to keep a short journal over two weeks describing your daily activities. We would also like you to include activities that go beyond the normal school day – before school and after school. Journal entries should be brief – no more than two pages per day and should be entered at the end of each day. We would particularly like you to offer your reflections on any highs and lows and critical incidents (defined below) that may occur throughout the day. These reflections will enable us to recognise which events are stressful for headteachers, and the implications for headteachers' well-being. Equally, your reflections on the things that energise and enthuse you will enable us to begin to think about coping strategies and ways in which headteachers sustain their work–life balance.

The journal can be structured as follows:

- what you do
- stressful incidents to be logged and identified with '**low**'
- highlights of day to be logged and identified with '**high**'
- any critical incidents to be logged and identified with '**'. Please note that for the purposes of this exercise, critical incidents do not relate to the importance of events but rather the type of events that cause anxiety, stress or pressure, eg dealing with disciplinary or performance issues

To enable us to evaluate the activities that headteachers engage in and to get a clear picture of both the stressful and positive aspects of the job, your entries will need to be fairly specific, ie 'paperwork' would be too generic, whereas 'writing the school improvement plan' would be more useful.

Example

Monday 12 January 2006

9–11am Writing first draft of the school improvement plan

11–12 noon Meeting with parents re pupil behaviour **
[brief explanation of why this was a critical incident
and how you coped with it]

12 noon–1pm Lunch with two new members of staff (**high**)

You will notice that your journal has tear-out pages. This is to enable you to send us the relevant pages once you have completed your journal. Please return your completed journal to:

Research and Policy Group

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➔ Appendix 2

Example observation schedule

Name of observer _____

Name of headteacher _____

Name of school _____

Date _____

- Introductions etc
- What things are you hoping to get done today?
- An opportunity to clarify highs and lows and critical incidents
- Details of activities, for example administrative activities
- Remind about journal entries

Pre-school

Time	Who	Subject matter	Where	Observations and reflections	Highs and lows **
Specific critical incidents					

Morning

Time	Who	Subject matter	Where	Observations and reflections	Highs and lows **
Specific critical incidents					

Lunch

Time	Who	Subject matter	Where	Observations and reflections	Highs and lows **
Specific critical incidents					

Afternoon

Time	Who	Subject matter	Where	Observations and reflections	Highs and lows **
Specific critical incidents					

After school

Time	Who	Subject matter	Where	Observations and reflections	Highs and lows **
Specific critical incidents					

Did you get everything done that you planned today?

Will you be doing any more work when you leave school? (If yes, what and for how long?)

➔ Appendix 3

Example interview schedule

You will have spent a day work-shadowing and have had chance to see the journal prior to the interview. The purpose of the interview is to add detail to the picture of a headteacher's day as it emerges from the shadowing and the journal.

Some of the questions will be driven by what you see when shadowing the head. Some of the interview questions will be driven by the journal in which we will ask heads to highlight critical incidents as well as highs and lows. We will want to explore these in more depth. In addition to this there will be a number of generic questions that we will ask all the heads.

It's difficult to be too prescriptive with the questions around the work-shadowing day and the journal at this stage as these will be driven by what you see and read.

Please note that some of the questions may seem repetitive. This is to ensure adequate coverage of the issues. If you feel you have already addressed a question previously, please feel free to leave it out.

What does the working life of headteachers look like in 2006 in the current climate of complexity, relentless change and accountability?

1. Was the day typical? Was there anything out of the ordinary?
 - a. Select a couple of incidents from the shadowing day and journal that seem to be highlights of the job.
Prompts: Are these highlights of the job? Why? What are the other highlights of the job?
 - b. Select a couple of incidents from the shadowing day and journal that seem to be lows of the job.
Prompts: Are these low points of the job for you? Why? What are the other lows of the job?

2. Were the majority of the activities planned?
3. If there were three things you could choose to change headship, what would they be?

Which elements of the job offer the most or least reward and satisfaction?

4. Building on the highlights that we have discussed already, which elements of the job give you most reward and satisfaction: ie which are the best bits?
5. Can you give examples? [explore all]
PROMPT: what energises you? What drives and enthuses you?
6. Which elements of the job give you least reward and satisfaction: ie which are the worst bits?

What hinders work–life balance and well-being?

7. Do you feel you have a good work–life balance?
 - a. If yes, what strategies do you adopt or put in place to maintain work–life balance?
 - b. How can we share this with others?
 - c. If no, what would need to change to give you a good work–life balance?
8. What are the lows of the job?
9. Are there any aspects of your job that others could help you with?
10. If yes, do you have enough capacity within the school to delegate tasks to others?
11. If you could choose three things to improve work–life balance, what would they be?

What contributes to a positive work–life balance?

12. What are the key things that help promote your well-being?

13. What sustains you in really difficult times? Please give examples.

14. What do you do to relax?

Other

Biographical questions

- Marital status: married, single, other
- Children: yes, no? If yes, how many?
- Date of birth
- Years in current post
- Years in headship
- Number of headship posts: first, second, third, etc
- What professional development has supported your leadership role?
- Do you hold the National Professional Qualification for Headship (NPQH)?

Biographical questions

Marital status (married, single, other)	
Number of children	
Date of birth	
Years in current post	
Years in headship	
Number of headship posts (first, second, third, etc)	
What professional development has supported your leadership role?	
Do you hold the National Professional Qualification for Headship (NPQH)?	

Source	Journal	Observation	Interview
1. What does the working life of headteachers look like in 2006 in the current climate of complexity, relentless change and accountability? List summary here			
<i>1a. If there were three things you could do to change headship, what would they be?</i> List summary here			
2. Which elements of the job offer the most or least reward and satisfaction? List summary here			

***Please include key quotations in the summary for each question**

Source	Journal	Observation	Interview
3. What contributes to a positive work-life balance (including any coping strategies and whether the headteacher felt that they had a good work-life balance)? List summary here			
4. What hinders work-life balance and well-being? List summary here			
4a. <i>If you could choose 3 things to improve work-life balance, what would they be?</i> List summary here			

***Please include key quotations in the summary for each question**

Notes on headteacher's journal

Highs	Lows	Critical incidents
List summary here	List summary here	List summary here

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