

# **Taking over the Controls: A Case Study of Headteacher Internship in England**

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## **Taking over the Controls: A Case Study of Headteacher Internship in England**

### **Abstract**

Early in 2006 the headteacher and governors of a secondary school in England asked the Deputy to become Acting Headteacher for a short period of the year in order to assess the implications for leadership learning. The plan was to switch jobs for a period of four weeks in order to explore the potential of guided action learning for leadership development. This study records the events and perceptions of the main actors in this job change and reports on the implications of this approach to leadership learning for both the incumbent headteacher and the school. The conclusions draw on a range of data accumulated before, during and after the period when roles were switched, including personal diaries maintained by the headteacher and deputy and extensive interviews with each of the principal participants<sup>1</sup>. The outcomes of the project were advanced leadership learning by both the headteacher and the deputy who was the intern and an increased understanding of the dynamics of senior leadership structures, particularly with reference to the notion of distributed leadership. As a consequence the enquiry is able to frame recommendations that would enhance headteacher preparation.

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<sup>1</sup> Pseudonyms have been used for the headteacher and deputy who feature in this article.

## **Taking over the Controls: A Case Study of Headteacher Internship in England**

### **The Context**

Preparation for headship in England has moved on since the introduction of the National Professional Qualification for Headship (NPQH) in 1997 and there is evidence to suggest that newly appointed headteachers now feel reasonably well prepared for the demands of the job (Male, 2001; National College for School Leadership, 2004). These findings contrast with research carried out during the last decade of the previous century on serving headteachers in other parts of the United Kingdom as well as England which indicated that effective preparation for headship had often been incidental and fortuitous, rather than planned, and left the majority of the headteacher population not feeling ready for the demands of the job (Dunning, 1996; Draper and McMichael, 1998; Male and Merchant, 2000; Male and Murray, 2004). The simple conclusion that could be drawn at this point is that the NPQH could be considered to be an effective mode of preparation for headship.

Such a conclusion would be optimistic, however, as the theory base emanating from research into other occupations show the period of transition from participant in senior leadership processes to accountable executive to be problematic (see, for example, Jones, 1986; Gabarro, 1987; Schein, 1988). Subsequent investigations within educational settings found this theory base still to be relevant to headship in that the early stage of incumbency as the formal leader of the school is a period of 'sense-making' characterised by feelings of surprise, isolation and fear as the newly appointed headteacher comes to terms with the demands of the job (Reeves, Moos, and Forrest, 1998; Daresh and Male, 2000; Weindling, 2000). This period of transition is usually complete within a 2 to 3 year period, it was generally concluded, although it can be shorter or longer depending on local circumstances and the level of support available to the new headteacher.

Learning to become the formal leader of an organisation has been demonstrated to proceed along three dimensions – the occupational, organisational and personal – on the journey to becoming competent and confident in the job (Feldman, 1976; Male, 2006). The occupational route is comprised mainly of the generic technical skills needed to be the formal leader of an organisation within a larger educational system, whereas the organisational and personal routes feature a number of specific learning experiences governed by individual, often unique, circumstances (Crow, 2005). Support along these dimensions is usually best achieved through mentoring either by experienced colleagues or sympathetic friends who can provide effective professional learning through the examination of dilemmas which pose challenges to personal value sets (Argyris and Schön, 1974; Daresh, 2001; Davis *et al*, 2005).

Leadership learning and development is based on increasing relevant knowledge and providing the opportunities to apply that knowledge to practice. Examinations of that process in the USA with regard to teacher and principal development determined that such learning comprised three elements: academic preparation, professional formation and field-based learning (Lortie, 1975; Daresh and Playko, 1990). The conclusions of these lines of enquiry thus advance the argument that people must undertake preparation and receive support for their leadership roles through equal attention to the development of a strong theory base, supplemented by realistic guided practice in the field that will allow aspirant school leaders to form the range of personal and professional capabilities necessary to cope with the ambiguities associated with the responsibilities of their new job. Academic preparation (knowledge building) in the USA is largely based on formal programmes, usually provided by universities, leading to the acquisition of a knowledge base deemed appropriate for the Principal's Certificate, whilst professional formation is more personal in nature and is heavily dependent on reflection and mentoring. Field-based learning comprises practical experience including both apprenticeship and internship which is not only planned, but is often mandatory. A survey conducted towards the end of the last century demonstrated, for

example, that some 90 per cent of school administrator credential programmes in the USA required and internship experience of some kind (Murphy, 1992).

The preparation of headteachers in England is heavily reliant on the National Standards for Headteachers, last updated in 2004, and places a premium on applicants to NPQH having demonstrated their successful engagement in formal leadership activity, mostly within their own schools. The expectations for a prospective headteacher to have acquired an academically derived body of knowledge is not as intense as in the USA and, prior to the inception of the NCSL, was even considered as 'deeply unfashionable' in British education (Bush, 1999). Although that situation was deemed to have improved by the beginning of the twentieth first century, the body of knowledge expected for a headteacher was still based on practitioner inquiry and 'theory grounded in practice', rather than explicitly research oriented (Bush and Jackson, 2002: 425). Similarly, the requirement for professional formation and field-based learning experiences beyond their current remit are not so well established and there is an almost complete absence of internship as a pre-requisite for headship. Instead the process of personal development for prospective headteachers is heavily reliant on models of apprenticeship.

The notion of apprenticeship is one of learning an art or trade through practical experience under skilled workers and there have been many examples of headteachers who have encouraged the rounded development of their senior staff to the point where they are prepared for headship. Frequently this is achieved by providing opportunities for individuals to develop leadership and management skills, a situation more frequently seen in secondary schools where there is greater chance as personal teaching loads are often reduced for those in more senior positions. It is worth noting, however, that there is no obligation for schools to provide learning experiences which are practical in nature and/or models of apprenticeship, with the prospect of there still being individuals engaging in non-directed, incidental in-school experiences which provide only limited experiences

to allow them to develop as leaders of the future. Although the requirement to engage, evaluate and validate practical learning experiences is embedded within the NPQH process, experience of assessing applications demonstrates that it is still fairly common to find candidates engaged in a range of activities, but having direct responsibility for few.

Nevertheless, research shows that the vast majority of headteachers arrive in their first post confident both of their range of skills and their personal value sets, with that proportion seeming to increase as a result of NPQH (Male, 2001). Sadly, however, a significant proportion still begin their new duties without a clear understanding of the demands of the job and with inadequate practical experience to take on the new role successfully without a period of personal turmoil and feelings of ineffectiveness, with the proportion relatively unchanged over the last 20 years (see, for example: Weindling and Earley, 1987; Earley, Evans, Collarbone, Gold and Halpin, 2002; Male and Murray, 2004).

It was findings of this nature that had influenced Dave, the headteacher who is the focus of this study, to consider the idea of using internship as a method of developing his deputy whom he perceived to be a future headteacher. He had worked on data relating to preparation for headship in England as a Research Associate for the National College for School Leadership (NCSL), a grant that had paid for his release from school for a period of 20 days in 2002. This investigation had left him intrigued by the notion of internship as a means of enhancing preparation for headship and as identifying whether a person was capable and ready to make the transition to headship. He had reservations about the official route to headship, the NPQH, feeling that it did not fully prepare candidates for the reality of headship:

For NPQH you have ticked the boxes and all that says is that you have read the right books and managed to jump through the right hoops at the time, but there is a magic to headship. I think that headship has got something special about it which NPQH does not capture and it is only by living that experience do you get the real opportunity to get a sense of what that is.

Dave was thus aligning himself to the emerging view that headship in a postmodern era is complex, and requires the ability to tolerate ambiguity and uncertainty whilst still keeping a focus on student learning and continuous improvement (see, for example, Crow, 2005). He considered, therefore, that in addition to the NPQH process on which she had already been successful his deputy, Sam, would benefit from a further dimension of learning through engaging in leadership activities beyond her existing remit. He saw internship as the ideal vehicle for this development and planned to offer her the chance to take over the controls for a while in order to experience more closely the real challenges of formal school leadership. He was not entirely altruistic in his motives, however, and was equally looking to enhance the capability of his senior leadership group and considered the internship experience would enhance the capability for him to deal with the true demands of distributed leadership whereby he would have to allow things to happen without his direct involvement.

The definition of an intern used here is a graduate who is receiving practical training in the workplace. The essential ingredient that distinguishes an intern from an apprentice is that internship will take place in an environment that is different from their normal workplace. Theoretically the challenge of working in a different environment will mirror many of the features of early headship, such as the need to develop new relationships with unfamiliar people and to effect change in a context where you have less than full knowledge of local circumstances and organizational culture.

Internship experiences can vary in length and intensity according to the depth and quality of prior learning experiences, to the context in which the field-based learning experience takes place and the level of support provided (Crow, 2005). Internship models across the world ranged in length from short block experiences of high intensity to serial experiences lasting up to a year where the intern

was engaged in a part-time capacity in a different working environment. In Singapore, for example, aspirant heads were attached to their mentor's school for a period of eight weeks as an associate headteacher whilst internship models in the USA included one year attachments in North Carolina and a highly structured six month programme in Chicago (Bush and Jackson, 2002). The plan was for Sam and Dave to swap jobs for a month, during which time she would take over as headteacher. The model to be employed was thus a short, block experience of high intensity which would thus expose her to some of the tough moments of transition experienced by those new to formal school leadership as they went through the stages of socialisation that have been recognised in recent times (e.g. Cordeiro and Smith-Sloan, 1995; Weindling, 2000; Mulford, 2003; Crow, 2007).

In this instance Sam would not be required to assimilate herself to a different social system from the one of which she is currently a member, so this was not the ideal model of internship where she would have been required to adapt not only to a different role, but also to a different organisation to which she was a stranger. She would, however, be required to adopt a different personality during the period she was the 'headteacher', a previously documented phenomenon that demonstrates that although you remain within the same school people view you differently when you become the headteacher (Daresh and Male, 2000, Male and Merchant, 2000). As a consequence it could be expected that she would be treated differently and would feel different in her new role, even though all involved were conscious of the fact that she would only be there on a temporary basis.

### **Setting up the internship**

The idea for establishing the internship was initially discussed with the senior leadership group and the governing body some months in advance, with both bodies indicating their support. The Chair of Governors was especially taken with the proposal as he thought it would provide an excellent development opportunity for the deputy. Once formal approval was granted by the governing body all other members of the school community, including staff, parents and pupils, were informed.



Dave also contacted colleagues who chaired local headteacher groups and working parties and informed the Chief Officer of the local authority. Generally the project was favourably received with most key stakeholders offering their open support

After many months of negotiation and a week of observation, one Monday morning in February the deputy moved into the headteacher's office and he moved into hers. She was to be headteacher and, in order to minimise staffing costs, he was to carry out her teaching and leadership tasks as the deputy.

### **The participants**

The direct participants in this study were the headteacher, the deputy headteacher and the first author who conducted all the interviews used to inform this study. Dave, the headteacher, was in his second headship and had been in this school for six years. Sam, the deputy, had spent fifteen years of her working life in the same school, rising from a teaching position through to the senior leadership group, firstly as an Assistant Headteacher, then being appointed as Deputy about 18 months ago. The authors are senior academic and experienced researcher and evaluators, based in a regional English university. The school was an 11-18 secondary school with a roll of about 1600 pupils based in a London suburb.

### **Methodological Issues**

The headteacher and the deputy were well known to the first author, who had supervised both of them in their doctoral studies, although not at the same time as they were enrolled at different universities. The potential for bias in this study was evident because of this personal knowledge of their previous professional experiences, with the author having provided advice and guidance on both academic and professional issues. Consequently opinions about their individual characters and capabilities had been previously formed. It was important, therefore, to provide multiple

opportunities for verification procedures with the participants in order to avoid the risk of analysis that was dominated by pre-determined theories or researcher values. The role of the second researcher, who was not personally known to the participants, was therefore to provide a further check and critical perspective on the interpretation of the data collected. The situation thus lent itself both to methods that allowed the perceptions of the individual participants to be recorded without direct intervention by the first researcher yet also allowed for analysis of events against an existing body of knowledge coupled with the 'outsider perspective' of the second researcher. In effect, therefore, the enquiry exhibited many of the hallmarks of the common definition of a case study in that it allowed for a rich and varied description of events, allowing individual contributions to be recorded chronologically, had the integral involvement of the researcher and allowed for description of events to be blended with analysis (Hitchcock and Hughes, 1995).

The investigation employed a number of research instruments, including documentary analysis, diary keeping and interviews. The main ambition was to record events contemporaneously, particularly those which involved feelings and perceptions at the individual level. Consequently the headteacher and the 'intern', maintained personal diaries through the period of the experiment. The diaries were in word processed form, with each participant making daily recordings and both also taking the opportunity to record their thoughts and feelings pre- and post-experience. The headteacher was also interviewed off-site by the first author after just one day of the internship and again at the end of the period. One week after the end of the internship both the headteacher and the intern were interviewed separately and jointly immediately afterwards. These interviews were recorded, transcribed and offered to the participants for verification before analysis commenced. In keeping with this phenomenological approach to research all data were subsequently analysed using an open coding system which allowed for emergent issues to be identified and grounded theory to be established (see Glaser and Strauss, 1967).

At the start of the joint interview neither had seen the other's personal diary, although the first author had. This advance reading of the diaries was used to frame the joint interview, although the schedule was subject to an organic process as different issues had emerged in the individual interviews that had been held immediately beforehand. In other words there was a need to be adaptable, flexible and capable of dealing with emergent issues. The end point of the joint interview was agreement of the main issues emerging from the enquiry. The data are thus judged to be a fair representation of the thoughts and feelings of both participants prior to, during and immediately after the period of internship.

### **Thoughts prior to the internship**

Dave voiced two major concerns prior to the commencing of the internship: whether he would be able to provide a realistic experience for Sam and how he would manage himself through the period. Successful headship, he argued, was the process of filtering information and evaluating actions against a personal value set. Even though Sam was to take the position of headteacher and he had set up people and systems to ensure she was taking all the responsibility, this was still planned to be a moderated exercise. Would she, therefore, be taking decisions and synthesising information in keeping with his value system more than with her own? If so, he wondered how much of the reality of headship she would come to understand through this experience.

He was mostly concerned with his own behaviour, however, having no concerns about her making decisions and to taking power, frequently stating that he had total trust in her ability. It was the issues of how far back he should step from the position and how he would cope with being out of the information flow. All headteachers, he claimed, were "control freaks" who had "their finger in every pie". Now he was about to hand over control to someone else and voluntarily take himself out of the information loop. How would this make him feel and how would he manage? In his

first interview he indicated this concern when pondering how she would filter information through to him:

I am now reliant on her to feed back to me [the contents of the incoming correspondence]. Now this brings into question the whole values issue. Will she synthesise out of that what she thinks I now need to know, but is that the same as what I actually want to know?

Knowing when to take back control was also an issue that exercised his imagination, although he could not identify any parameters in advance by which he would terminate the experiment entirely and actually felt that such an action would be hugely detrimental to Sam. Rather he felt there were circumstances where he might be required to step back in his official capacity, but felt this was likely only to be for the duration of the incident or event that required him, in his full accountable mode, to take direct action. Notification of an impending inspection by the Office for Standards in Education (Ofsted), for example, or a critical incident concerning the school that was being highly publicised in local or national media were cited as probable events requiring his intervention. He was unable to express such precision regarding circumstance by which Sam may need to be relieved of her temporary role because of her actions, indicating that he would be working on “gut instinct” in this regard, particularly if he felt the trust he held so strongly was being eroded. The two of them did intend to have a daily session which would consist of information feedback and reflective discourse, a role he anticipated would be more in keeping with mentoring than coaching as he felt her skill level to be sufficiently high to be able to deal with the demands of the job. He did not anticipate having to do any counselling as, despite her protestations, he considered Sam as being highly confident on most issues.

They had worked closely together in the past and the interviews showed they were considered to be symbiotic by other members of staff to the point where the chemistry was so effective that they were sometimes seen as a major axis of power. Neither of them claimed to have used this relationship to have manipulated the outcome of decision-making in any way and perceived

themselves to be operating with moral integrity in the best interests of the school community. The closeness of the working relationship had been a significant factor, however, when deciding how much power and authority would be ceded to Sam during the period of the internship which, because of their affinity and his high level of trust, became a total devolution and a job switch.

### **Internship in action**

#### *Week 1*

Diary entries by Sam and Dave demonstrate how quickly each was affected by the demands of the internship. Sam experienced almost immediate satisfaction with the way people treated her and reacted, yet by the middle of the first day Dave was already experiencing emotional turmoil. Initially this was irritation with the sledge hammer type of wit exhibited as it seemed that all those around him repeatedly enquired how he was enjoying his 'holiday', but this was followed by a sense of dislocation that frightened him. For the first time in 14 years as a headteacher he was not seeing the whole picture and by the middle of Day 1 he felt "out of it". He was also expressing concerns about "errors of planning" in that he perceived Sam as thinking what they had done was merely a job switch, when he felt it was more substantial than this. She picked up on this describing him as "acting weirdly", including speaking sharply to her when she telephoned him and noting that he did not attend an informal, but regular, gathering of the senior leadership group later in the day when he usually made a point of being there. Similar issues arose over the next couple of days as perceived sensitivities played out in practice. As misfortune would have it Dave was to chair the next formal meeting of the senior leadership group in his 'new' job (which was rotated amongst the members) and found it difficult to stop behaving as the headteacher, summarising a number of points and making the final statement. Sam noticed this and commented:

This is just one example of an issue about the process. Regardless of switching jobs he is still viewed as the head. When he is not around I am left to do his jobs/tasks. But when we are together people are starting to defer to him. This may be because they want to be polite, or see him still as the head.

By the end of the week Dave was obviously worrying about his role, particularly his inability to carry out the supporting aspect of mentoring and coaching. In part this was down to a lack of time, although he also commented “I have been too busy holding back, not wanting to get in the way [and] I had lost sight of what I was supposed to be doing”. He confessed to not have agreed clear guidelines for structured meetings so that he had a clear role and was not just an onlooker. He had been too busy, he suggested, “fretting over not been in control”. Sam, meantime, was recording that she felt like she had “been doing the job for ages” by the end of Day 4, but was starting to become concerned at Dave’s behaviour:

Haven’t seen much of Dave and there seems to be a tension. I tried to corroborate this and he said there wasn’t a problem. When I pushed this it appears there are issues, not with me doing the job, but with how he feels about it. He wouldn’t tell me more than this but is recording all his thoughts. At a guess I think he feels out of the loop - that he isn’t first to know important things, and that things are discussed with me and others before him. We have [now] both agreed the importance of keeping him in the loop otherwise hand back [at the end] will be difficult.

Other diary entries she made that week tended to demonstrate her becoming confident in the job, although feeling a little uncomfortable in meetings outside the school with other senior educationalists across the school district. She jokes about site staff saluting and dropping to their knees regularly which she describes as “great” and by the end of the week reports that she feels different and has noted the need to withdraw slightly and get on with the job. One issue which troubles her is the conflict emanating from her continued role as a working parent. On Thursdays she always picks her young daughters up after school, but felt guilty leaving the job at this time now she is the ‘headteacher’. Dave helps out by covering for her when she leaves, but within an hour she is back again, having dropped off her girls at a child minder. This, she notes, is because not only did she feel the headteacher should be around long after the end of the teaching day but, as she surmises in her interview, there was an implicit expectation within the school that the headteacher would be around and available at that time of day.

*Week 2*

Both participants are still finding their way. The major issue remains the inadequacy of the relationship between them for mentoring and coaching. Sam reflects that the main reason is probably that they have agreed a job switch in order to keep costs down. The consequence is that Dave does not have the time or opportunity to meet with her when she most needs his support, meaning that the times they do meet are contrived and the conversation stilted. The value of the experiment would probably be enhanced, she concludes, if Dave was available as a resource to her although she also notes that she would have been very worried about the pupils she teaches if the substitute had been anyone other than Dave. By Tuesday, however, a situation has arisen where the two of them can work collaboratively and productively on a challenging issue with Sam in the headteacher role and Dave acting as her mentor.

The school was to appoint a new head of Physical Education, the department through which Sam had passed on her way to the senior leadership group, and the final selection processes were to take place on the Tuesday. By late Monday evening Sam was realising that headship requires earlier and greater preparation for such events. Normally all she had to do was to ask a couple of questions and contribute to the debate of the appointing panel. Now she was to not only chair the process (and make the decisive contribution), but would also have to manage the feedback to the unsuccessful candidates. As there was to be at least one internal candidate who would be disappointed this was not a task to which she was looking forward in keen anticipation.

The selection process went extremely well and Dave is fulsome in his praise of her performance, describing it as “one of the trickiest situations I have come across [and] she managed this superbly”. The situation was not only fraught with potential danger because of her previous involvement in the department, but was also exacerbated during the course of events when the Chair of Governor’s preferred candidate was revealed not to be the choice of the appointing panel. Sam had to remain

steadfast and report that the candidate had not stood up well in aspects of the selection process in which the Chair had not been involved. It was the handling of the feedback, however, that allowed for the most productive moment in the week for Dave in his supporting role as mentor and coach. Both diaries demonstrate there to have been very fruitful conversations between them as how best to handle the telephone calls to unsuccessful external candidates and the personal feedback to the unsuccessful internal candidate.

The other major issue of the week involved an animated debate between the school and a senior officer from the local authority about pupil attainment which had been below anticipated levels. Dave was irritated by this intervention and was clearly itching to get involved, aggressively if necessary. Sam, on the other hand, counselled caution and allowed the conversation to play out more slowly, thus reducing the tension. By the end of the week Dave was reflecting positively on her behaviour:

I have actually surprised myself today with this [attainment] business. Her calm reflection on the situation was the correct one. Me, I would have gone in with both feet!

These were seminal moments in the experiment as Sam came the closest so far to understanding the tensions and dilemmas of headship whilst Dave was not only able to fulfil his ambition of mentoring and coaching, but was also able to see how a tricky situation could be handled in a different and more productive way than his normal style of response would have allowed.

### *Week 3*

The third week started at near crisis point, however, and by Wednesday morning Dave was on the verge of ending the internship as he no longer felt in control and was unhappy with a number of events which could challenge ambitions for the future. His diary entries show him to be so disturbed he was sleeping badly. Sam picks up his mood and describes him as being “really irritable” generally and “surprised and annoyed” about one decision in particular. Dave illustrates his



frustration through his thoughts regarding the submission of the headteacher's report to the forthcoming meeting of the governing body:

I need to see the headteacher's report this morning before going to press. I wanted to look at the report with Sam [as] there are issues to be covered which I had dealt with and she would probably not know about. How can I help if I don't see the documents before they go out? My real concern is that if the report has any contentious detail in it might set her up for the meeting. Probably me fussing too much, but again there are plenty of conversations going on but not with me. Found the headteacher report in my tray [with] information missing which could have been included. Disappointing.

To Dave, this has become a real issue as he tries to keep his nerve whilst simultaneously feeling "out of the loop" and worrying about decisions with lasting implications for the school that are being made without his knowledge and involvement. These feelings are heightened by the continued difficulty of fulfilling his ambition to be mentor and coach.

The mail, directed to me is appearing in the tray. However, we agreed that we should sit down and go through the post. This would enable me to keep updated on what is coming in and also 'coach' Sam on what action is the most appropriate. Again I am only seeing what she has filtered out, are there other papers? This is not helped when I see trashed emails which had specific information for me. I am getting further and further into the dark, am not in the loop and not able to coach and support as intended. Sam said she was just getting on with it. This is not what I envisaged. Perhaps I should just let her get on with it. She is more than capable. Trust is not an issue, her capability is not an issue. I just feel completely out of it. Trying to meet with Sam has been relegated to when it can be fitted in. Given the nature of internship, this is not satisfactory. There must be set meetings, put in the diary, so that regular meetings can take place to review what has happened and prepare for the following day. This may need to be done on a graduated scale, daily to start with but less frequent as the internship moves on.

Whilst Sam is aware of his growing irritation and frustration, she is oblivious of how close Dave comes to terminating her spell of duty as acting headteacher until after the end of the internship when it was revealed to her during the joint interview. Her diary for the early part of the week shows her to be heavily involved in the issues facing her as headteacher and only paying passing attention to the mounting tension. By now her confidence has grown to the point where she is happy dealing with issues and sees no obvious reason to consult Dave before acting. As a consequence she makes key decisions in relation to the relocation of administration offices and to

the staffing of the school's outreach service, decisions which Dave only finds out after the event. He is concerned and angry as the consequences will only play out after the internship is over. His mood is not improved later in the week when, in a meeting about a project into which he has invested considerable time and emotional energy, key information is unadvisedly dropped into the conversation. He would have handled it differently and struggles not to speak his mind and take back control.

The reflective comments in his diary at this point show him to be at an emotional low point. He wrestles with his feelings and explores his own behaviour in an attempt to be dispassionate and objective. The problem, he concludes, is that the model of internship is wrong. Greater structure was needed, with insistence on regular meetings to discuss decision options. Interestingly he also indicates how the relationship between them has changed, with fewer discussions and meetings than when he was the headteacher and she was the deputy. This, he suggests, is in part due to his own behaviour in that in giving her space to do the job he has stepped back too far, although it could also be attributable to Sam's ability to merely get on with the job (as she sees it). Again this is a critical point in the internship as her diary entries sees her possibly giving less attention and credence to events that are outside the immediate domain of the school. She is not impressed by either the overt or hidden agendas within a meeting of local headteachers, for example, and wonders whether her attendance at a recruitment workshop for prospective teachers is a good use of her time. Dave, who places greater importance on such activities, meanwhile seethes with frustration and struggles with his conscience about ending the internship.

Fortunately (or fortuitously) Sam's perception allows her to recognise this crisis point, although she is not fully aware of the cause of Dave's behaviour. Nevertheless she initiates a meeting with Dave where he is surprised by her insight. It is almost, he decides, "uncanny" how she has sensed his feelings to the point where he wonders if she has been reading his diary! By the end of Wednesday

he is much happier with the prospects of continuing. By the end of the week the information flow seemed to have improved and their relationships to have become less tense.

#### *Week 4*

On Monday Dave was feeling more able to deal with the uncertainty of not having all information and cites an example of witnessing a discussion between Sam and another member of teaching staff where he was able to walk away and leave her to deal with the issue, even though it was of continuing importance for when he was back in charge. “Am I” he pondered “really dealing with this now like a grown up adult”? By the Tuesday he is obviously feeling more comfortable in his role, indicating that he no longer feels so left out and is able to make a contribution to Sam’s development through mentoring and coaching. Instead he is by now reflecting on how he could have put more challenge into what Sam has done in order to make her think about alternative solutions.

The rest of the week shows them working amicably and competently together in their respective roles, although by Wednesday evening Dave is in serious reflective mode as he makes his way home from his ‘exit interview’ with the first author. The series of questions he has been faced with make him think long and hard on the train back home. Why, he wondered had he felt so isolated throughout the experience, with almost no personal contact with the other deputies and with his PA throughout the four weeks? Was it because they only saw him as the headteacher and not as a person? Whilst these emotions troubled him his major consideration, however, was the model of internship which he likened to the ‘big bang’ theory, deciding that overall it had been successful.

We have come through it, survived and our relationship is stronger for the experience. You have to go through the pain before you come out the other side understanding what is happening. The old maxim: no pain, no gain!

## **Post Internship**

Dave's closing entries to his diary show the experiences of the internship immediately left him asking questions about the future operating style of the senior leadership group. Midway through the experiment and because of his emotional state he had exhibited concern as to how he might deal with a true model of distributed leadership where projects were led and completed without any executive action by him. Now he considered the prospect that Sam may not be entirely settled again with the job as deputy. Consequently he was exploring the way in which he could change the way the senior leadership group runs. "A key area of the school which needs overhaul is the sixth form" he mused, "[and] she is the person for that. No particular baggage with regards to locked into tradition and will bring a fresh perspective on the whole thing".

Both diaries show each of them to feel more than a little dislocated when reverting to their former roles, Sam indicating that she felt "slightly lost" and unwilling to carry on with tasks that had been her responsibility whilst in headteacher mode. Instead she found fairly mundane jobs to do and tried to catch up with tasks that Dave was scheduled to have done whilst he was in deputy mode. Meanwhile, Dave felt "very uncomfortable" to come into school on the Monday and "strange" to re-enter his office. Fortunately the school Easter holiday was close at hand which they both considered would give them a chance to reorient themselves to their respective jobs. They had also been fortunate to have held the annual off-site residential senior leadership group conference on the last day of the internship which Dave had led as it was focused very much on the future. This had also provided them with time and tasks to think themselves back into their role.

## **Reflecting on the internship**

Dave's interview during the last week of the internship largely reflected his diary entries, particularly his discomfort with the reduced flow of information available to him throughout the period. He reiterated that he had no problems at all with the performance of Sam as headteacher, in

fact praising her efforts and commenting on her growth as an individual. Rather the issue had been the steep learning curve he had experienced in trying to come to terms with his temporary role.

For the first 10 days or so Sam just got her head down and got on with it. Trying to force my way in to find out what was actually going on [was difficult] - it wasn't bloody mindedness on her part, she was just totally into the job.

The key learning point, he decided, was that the potential for total control of information as headteacher could very well "strangle" other senior staff as individuals and hinder the development of leadership capacity within the school. He recognised this principally through an observation from Sam who, in her acting headteacher role, commented on how political she could be, a statement he interpreted as a growing capability to be calculating and incisive. He also noted how the experience had given her a wider experience of the school in action and enhanced her perspective. This he determined would require him to think hard about how best to provide development opportunities for his deputies in the future.

Both Sam and Dave were interviewed a few days after the end of the experiment as to their thoughts and feelings as a result of the experience of internship. First each discussed their individual experiences with the first author, before having a joint interview. Dave was adamant that the main lesson to be applied to any subsequent internships was that regular meetings had to be scheduled between the two main participants. In this case the almost total devolution of power and responsibility had denied opportunities for mentoring and coaching as well as for continuity of information when the roles reverted at the end of the period. Sam was in full agreement, noting the need for such rigour in both her diary and these interviews.

They were asked subsequently to complete a reflective statement when they had read each other's diary and many of the same issues came through. The key message from Sam was the need for total transparency. Dave, she considered, could have told her how he was feeling in the early stages

rather than to leave such emotions running. For his part, Dave was trying to achieve a balance between standing back in order to give her the space to really experience headship and intervening as a support mechanism, freely admitting he did not judge it well. Both of them reflected that, despite the strength of their relationship going into the experience, there was a definite need for regular, scheduled meetings between them throughout the internship.

## **Conclusions**

Undoubtedly this was an invaluable experience for both participants and, potentially, the school. The major issues related to miscalculations in the planning stage, particularly with the establishment of agreed ground rules.

Sam, as the intern, gained experience that enabled her to broaden her perspective and enhance her capability as a leader and manager. By that criterion the experiment was a clear success, albeit with some reservations about the breadth and depth of that experience. Dave commented, for example, that in the early stages she was very task driven, not always looking to the long-term implications of her decisions and actions. By the end of the period, however, she was in total control of some new initiatives that would only be sustained into the future if she were to remain in control. Her growth as an individual was evident and her learning as a potential headteacher was considerably enhanced.

The real surprise was the effect on Dave, the headteacher. In planning it was assumed that the relationship between them was so strong and his trust in Sam's capabilities so secure that the communication flow would continue, thus making the coaching and mentoring role a natural extension of their normal existence. This was a miscalculation for three reasons. Firstly, the 'job switch' interfered with their ability to meet and talk; secondly, the alacrity with which Sam assimilated herself to the job precluded discussion about decisions and; thirdly, the feelings of dislocation for Dave were intense. This last reason surprised and unnerved him to the point where

he nearly terminated the intersnship at one point. Fortunately, they came through this period to ultimate satisfaction in that the school was likely to be much better as a result of the steep learning curve. Dave now sees how far he has to change his own behaviour and the structure of the senior leadership group if the maximum effect is to be achieved from the combination of individual talent. With his considerable experience of headship, and as a self-confessed “control-freak”, he now recognises from the experience of this internship the value of individual project management by his deputies and the likelihood of only being partially informed whilst such major change is taking place. Learning to live with that uncertainty is something he has still to do and will be contingent on the degree of trust he can place on the deputy. Given the high personal accountability of English headteachers that level of trust will be determined in relation to the individual concerned.

In this instance he placed too much trust in Sam in that he assumed they would meet and chat in much the same way as normal. Consequently there were no ground rules in place at the outset and productive discussion between them in their temporary roles only started mid-way through the four week period. The message for future internships is clear: make sure debriefing and mentoring meetings are scheduled and adhered to. Regular debriefing is required to ensure continuity, particularly when the roles are again reversed at the end of the period. Mentoring and coaching is required in order to ensure the intern does not just see the headship as task-driven and is considering wider and long-term issues. One of the main contributing factors to this internship developing in the way it did was the decision to ‘job switch’ in order to make the event cost neutral to the school. Dave needed the time to meet with Sam on a regular basis in order to sustain the knowledge flow and to provide the necessary guidance and support. Although there were undoubted benefits to him being able to manage other colleagues and students more directly, these were marginal in relation to the overriding objective of sustaining school success. He has already decided, therefore, that future models of internship in the school would not be contingent on him being able to act in a temporary capacity as a substitute for his deputy, particularly in regard to the teaching.

The overall conclusion is that the internship was extremely successful despite the turbulence experienced. There will be real and lasting benefits to the school not just in relation to the professional development of the aspirant headteacher, but also to the way in which leadership will be enacted in the future. The experience has been a major contributing factor to understanding the manner by which leadership capacity can be built and sustained in the school. Already, and as a direct result of the internship, Sam is trusted to lead the reorganisation of teaching and learning responsibilities within the school, whilst Dave gets on with other leadership and management activities. This is a major step forward for the school as it seeks enters new realms of performance and a tribute to the learning experiences gained because of the experiment.

The findings of this case study thus suggest there is room once more to review the nature of headteacher preparation in England as the twin elements of apprenticeship and internship are not integral to the scheme. The absence of internship in particular is unfortunate as it does seem to offer the opportunity for aspirant headteachers to trial some of the demands likely to be experienced once they actually move into post. Consequently we have concluded that aspirant headteachers need to broaden their experience before applying for headship and to learn from experiences beyond their immediate working environment if they are to have a greater chance of success in the transition to their new job. This is field-based learning which is, in effect, simulation, the learning situation where activities can be tried without the ultimate responsibility inherent in the post of accountable headteacher. Such simulated opportunities are recognized as higher order activities in adult learning, resulting in some transfer of skill as well as knowledge (Joyce and Showers, 1988). The outcomes of this internship project show that firstly there is a greater chance that such an experience will bring with it challenges that reflect the transition to headship more accurately than may be found in their current job. Secondly, the experience will expose the aspirant headteacher to



leadership and management practice that may be qualitatively different from within their existing work conditions. It is an adaptation to headteacher preparation that is recommended.

### **Final Thought**

Which leaves only one issue remaining, would Sam want to go on to become a headteacher? Prior to this experiment she had been adamant that the job was not for her and in the first week seriously questioned her chances of sustaining the work commitment as the demands challenged her role as working parent. These challenges, she surmised, were individual and cultural expectations rather than requirements, noting in her diary and interview that it would be possible to sustain both roles as headteacher and working parent as she could be more proactive in determining the allocation of her time than as a deputy. During the internship the Personal Assistant to the headteacher had been inadvertently unsympathetic to Sam's need to leave the school promptly on Thursday evenings by making appointments very close to her planned leaving time. This was almost certainly because she was used to scheduling meetings for Dave who had fewer direct parenting responsibilities that limited his availability. As a headteacher Sam considered she would have been more capable of managing her time and able to achieve a more satisfactory work-life balance because of the authority vested in the job. Overall her desire to be a headteacher had grown as a result of the experiment as she freely admitted to her sense of enjoyment that flowed from being able to use the residual power of headship. Confident that she could resolve her parenting challenges this was probably the job for her in the future, she decided, which gives us another reason to judge the experiment to have been successful and, ultimately, rewarding.

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