From Managerial to Instructional Leadership: Barriers Principals Must Overcome

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In the past few years, much has been written concerning the future of public education. Individuals and groups of all persuasions have speculated on methods to reform public education making it more responsive to the needs of students. Pseudo-educators and politicians have built a reputation on reforming public education and supposedly making it more meaningful. However, responsibility and accountability are nothing new to school leaders.

Background

The educational reform barrage "spurred on by business groups, school enthusiasts, conservative think tanks, and culture-war pundits, state governors and legislatures" (Zemelman, Daniels, & Hyde, 2005, p. viii) suggest that "almost all subscribe to the more-is-better school of rulemaking, generating hundreds of standards, targets, benchmarks, goals and procedures" (p. 8–9). Targets for student achievement have been addressed through the implementation of accountability in the form of assessing teacher quality (Hanushek & Raymond, 2005). Less importance has been attached to principal performance.

Policy makers are now taking notice of the research studies confirming the importance of the building-level principal in making lasting and meaningful change as well as noting that school leadership is second only to teacher quality (Darling-Hammond, LaPointe, Meyerson, Orr & Cohen, 2007; Davis, Darling-Hammond, LaPointe, & Meyerson, 2005; Institute for Educational Leadership, 2000; Knapp, Copland, Ford, Markholt, McLaughlin, Milliken & Talbert, 2003; Leithwood, Louis, Anderson, & Wahlstrom, 2004; Louis, Leithwood, Wahlstrom & Anderson, 2010; Mendels, 2012; Wallace Foundation, 2007; Zemelman, Daniels, & Hyde, 2005).

Principals have traditionally been administrative managers and not the instructional leader in the school (Hallinger, 2005). Principals had myriad roles to handle: building and resource manager, handling public and community relations, fund-raisers, administering busing and meals, and managing discipline, while tending to school finances (Pierce, 1935). The most radical change advocated by reformers is the transformation of the principalship from a management role to an instructional leadership role (Hallinger, 2003; Loeb & Horng, 2010). Principal leadership expectations are different; instructional "leadership has overtaken management" (Hoyle & Wallace, 2005, p. viii).

Principals are expected to establish a vision; to recruit and hire teachers; to motivate teachers and students through establishing high expectations; demonstrate instructional leadership skills with academic content and pedagogical techniques; and to provide professional development (Elmore, 2002) while facilitating the collection and analysis of data and ensuring teachers use data to drive student achievement (Branch, Hanushek & Rivkin, 2009), and ultimately, to ensure that

all school operations run smoothly (Knapp, Copland, Plecki & Portin, 2006; Leithwood, Louis, Anderson & Wahlstrom, 2004).

The principal has a critical role in working with teachers, students, and parents to provide a better education for students (Avolio, 2011). It is, therefore, imperative that reformers, governors, legislators, educators and others, consider the importance of the principal's role when attempting change (Cheney, Davis, Garrett, & Halleran, 2010; Hitt, Tucker, & Young, 2012). Current educational reforms demand the principal's participation in their implementation (Darling-Hammond, LaPointe, Meyerson, & Orr, 2007). However, before the change to instructional leadership can be accomplished, five barriers must be addressed: societal factors, the dichotomy of principal roles, expectations of the principalship; knowledge of curriculum and instruction; and human relations (Grissom, Loeb, & Master, 2012; Leithwood & Beatty, 2007; Louis et al., 2010).

Societal Factors

Principals are bombarded with demands from all segments of society and confront a variety of influences imposed upon the school from outside sources (Aud, Wilkinson-Flicker, Kristapovich, Rathbun, Wang, & Zhang, 2013). The 2013 MetLife Survey reported, "Among the responsibilities that school leaders face, those that teachers and principals identify as most challenging result from conditions that originate beyond school doors" (p. 3).

Historically, three institutions have provided most educational services to young people in America; the home, the church, and the school. The traditional concept of the home has deteriorated and students are more diverse, have no stereotypical family structure, often coming from single parent homes with single parents who do not have and cannot find jobs (Aud, Wilkinson-Flicker, Kristapovich, Rathbun, Wang, & Zhang, 2013). Students live in overcrowded substandard housing, unsafe neighborhoods, with forced mobility, may be physically neglected by parents using alcohol or drugs, and may be abused (Evans & English, 2002). School has taken on a societal role and has added programming to meet needs once handled by home and church, such as, sex education; counseling students; addressing teenage suicide, bullying, teenage pregnancy; and teaching values (Wallace Foundation, 2013). Consequently, schools often take on the role of the parent and are forced to provide new, mandated and unfunded programs handled in the past by either home or church, each taking time from core instructional subjects (Leithwood & Jantzi, 2006).

All these societal intrusions into the school impinge on the time and resources of the principal, especially time (Grisson, Loeb, & Mitani, 2013). Research on the principalship indicates lack of time as a major factor on performance (Louis et al., 2010). Principals must consider demands made by diverse groups and understand that their agendas flow from larger political and economic issues, which the democratic process should resolve (Grisson & Loeb, 2011). The school and the principal cannot be the answers to all of society's problems, yet, it is incumbent upon them to try to meet these basic needs of students in order for learning to take place.

Dichotomy of Roles

Historically, principals have been both administrative managers and instructional leaders. The earliest principals were "head teachers" who were managers out of necessity (Pierce, 1935). Over time and through tradition, the principal became the "custodian" of the school and its contents. Principals were initially selected and ultimately rewarded based on management functions, not instructional leadership. Perhaps the reason given most for not being an instructional leader would be the fact that it has always been done another way. Simply relating the manager functions gives

more security to many individuals. On the job, principals are more rewarded for updating skills in management than becoming familiar with the latest developments in curriculum and instruction (Moeller, 2009; Wallace Foundation, 2006).

New ideas and concepts mean change and many principals are afraid of anything advocating something new (Portin, Schneider, DeArmond, & Grundlach, 2003). The "new" principal, as characterized by the current research literature, is increasingly concerned with the instructional domain (Grissom & Loeb, 2009, 2011; Leithwood, Harris, & Hopkins, 2008; Shields, 2003). Goodlad (1978) states that the work of principals, "for which (they) will be held accountable, is to maintain, justify, and articulate sound, comprehensive programs of instruction for children and youth" (p. 326).

The dichotomy between administrative management and instructional leadership is implied in most recent educational reforms (Leithwood, Harris, & Strauss, 2010; Leithwood & Jantzi, 2000, 2005, 2008; Loeb & Horng, 2010). Principals are asked to make a commitment to instructional leadership while viewing management as a necessary contribution to instruction (Simkin, Charner, & Suss, 2010). Horng, Klasik, & Loeb (2009) reported principals engage in over 40 different types of tasks daily, spending 30% of the day working to supervise students and scheduling; 20% of their time on organizational management dealing with personnel and school finances; and less than 10% of the day on "classroom observation and professional development" (p. 2–3). Research postulates a commitment to being the school's instructional leader makes a significant difference between effective and ineffective principals (Beteille, Kalogrides, & Loeb, 2009; Institute for Instructional Leadership, 2000).

Some principals use lack of training as an excuse for not making a change (Leithwood, Harris, & Hopkins, 2008). Professional requirements of various states may cause principals to receive background experiences in administration and management to the exclusion of experiences preparing them to exercise instructional leadership (Harland, Harrison, Jones, & Reiter-Palmon, 2004). The final reason offered for ineffective leadership is a lack of support from superiors and subordinates (Wallace Foundation, 2011). Superintendents and the general public may advocate the need for an instructional leader, but it is the management functions of the principal that really concern them. Discipline and finances are constant sources of conversation, but instructional supervision is simply assumed to be occurring. Even teachers are more concerned with orderly management than with instructional leadership. Teachers most often view themselves as being responsible for instruction and the principal as the manager of discipline and order.

Finally, the question must be asked, what makes an effective principal? A synthesis of research reports principals present a number of recurrent behaviors necessary for effective school leadership (Balu, Horng, & Loeb, 2010; Darling-Hammond, LaPointe, Meyerson, & Orr, 2007; Leithwood, 2001; Leithwood et al., 2004; Leithwood, Harris, & Hopkins, 2008; Mendels, 2012; Waters, Marzano, & McNulty, 2003).

1. The effective leader sets the direction and establishes a vision to reach academic goals.
2. Effective principals have high expectations for teacher and student performance, articulating performance standards for teaching and learning.
3. As an instructional leader, the principal works with curriculum and instruction; the school leader presents focused and on-going professional development, encourages instructional innovations, utilizes proactive change processes, and frequently monitors and evaluates teachers and student learning.

4. The effective school leader communicates and builds relationships with teachers who become part of the leadership team. Leadership is distributed among team members who are working collaboratively toward the same goal.
5. School leaders establish a safe, orderly, and positive environment and school culture in which learning can occur.
6. School leaders manage time wisely, promote the school in the community, attend school events, have a presence throughout the school interacting with students, faculty, staff, parents, and community members, and thus, work long hours.

Expectations

Vision

It is important for principals to have a vision that reflects the instructional leadership role. However, they must do more than just believe; they must put the vision into practice (Southern Regional Education Board [SREB], 2010). Principals should not only administer the school in accordance with an established vision, but they should also, and more importantly, serve as instructional leaders. As instructional leaders they should seek new and effective teaching strategies and new ways of utilizing old teaching techniques (Green, 2010). This is not to imply that administrative management is unimportant. The management function is critical to the overall operation of the school, but it must not take priority over instruction. After all, instruction is the purpose for education (Leithwood et al., 2004; SREB, 2010).

Research studies have derived three useful generalizations in light of their findings relative to the vision of the principal as instructional leader. First, effective leaders set high expectations and reinforce these expectations through daily interaction with faculty, staff, and students. Effective leaders, in addition, are responsive to the socioeconomic context of their schools and communities by implementing programs and practices that consider the population served by the school. Finally, such leaders cultivate norms of collegiality and trust among their teachers (Byrk & Schneider, 2003; Green, 2010; VanAlstine, 2008).

It is apparent that vision involves the over-all picture of what a school is and where it needs to go. Such a vision would include implementation of a philosophy aimed at the needs of the students in the school. Accomplishing the goals of this vision requires a positive approach to the work being done in the school. Without the involved direction of the principal, the faculty of the school will never accomplish the task of meeting the needs of students and helping them progress.

When principals are enthused and excited about their schools, generally, they are helping the students, faculty, and staff become more involved in translating the vision into goals. Principals may improve faculty awareness of their desire to lead instructionally through their enthusiasm. This instructional leadership includes the principal's role in staff development programs, facilitating and training teachers, and supporting new instructional techniques in the classroom (Hallinger, 2003, 2005). The principal's participation in professional development sends a message to the faculty that the information is important and they will be expected to implement the strategies that are being presented. Principals serving as instructional leaders must have a clear vision for their school and must be focused on the students and their specific needs. Typical goals for accomplishing a student-focused vision might include identifying strategies to meet the learning needs of all students, helping teachers adjust to a constantly changing school population, and increasing students' academic achievement.

A 2010 Southern Regional Education Board report, *The Three Essentials: Improving Schools Requires District Vision, District and State Support, and Principal Leadership*, suggests district

office supervisors and school community members expect principals to be both instructional leaders as well as managers. Principals receive incentives and rewards for maintaining and managing schools (Jacob, 2005). Central office personnel place a high priority on custodial aspects of the job (Grisson & Loeb, 2009; Portin, Schneider, DeArmond, & Gundlach, 2003). Principals are evaluated on the cleanliness of the building, the attractiveness of the school plant, how well the students maintain the building, and how efficiently finances are handled (SREB, 2010). If the principal ignores management functions, the sanctions against such behavior are typically swift and brutal (Grisson & Loeb, 2009; Portin et al., 2003; Wallace Foundation, 2011).

Some districts also inhibit the decision-making ability of principals through formal or informal agreements with teachers (Harris, Rutledge, Ingle, & Thompson, 2006). Formal agreements, such as negotiated contracts, often result in boundaries, which limit the principal's opportunity for developing or implementing instructional leadership functions. Informally, principals often trade instructional leadership for compliance by teachers on other issues. Some educational organizations also advocate instruction as the teacher's domain and management as a function reserved for the principal. Such a dichotomy does not allow a proper blend of the roles to permit effective instructional leadership by the principal (Branch, Hanushek, & Rivkin, 2009).

Before principals can become effective instructional leaders, the internal support system of the school district must articulate the value of such behavior (Corcoran, Schwartz, & Weinstein, 2009; Miller, 2001). Without the internal support, all external influences for change will rapidly dissipate. This fact lends credence to the argument against mandated "top-down" change. The support structure, i.e., the superintendent, school board, supervisors, and others in the local system must support the process and help make the change "bottom-up" before the principal can truly become an effective instructional leader (Grissom & Loeb, 2009; Horng, Klasik, & Loeb, 2009; Portin et al., 2003).

Many school districts have lofty goals for principal behavior, but utilize unrealistic criteria to evaluate their performance (Grissom, Kalogrides, & Loeb, 2012). To be instructional leaders, principals must be given realistic goals and concrete methods for evaluation (Jacob & Lefgrin, 2007; Kane, Rockoff, & Staiger, 2008). Without objective evaluations principals will flounder in their perceived expectations (Clark, Damon, Martorell & Jacob, 2010; Rockoff, Staiger, Taylor & Kane, 2009).

An effective principal has always been expected to keep a school running smoothly; now, the literature on effective schools demands that the principal also spend more time as instructional leader (Horng, Klasik, & Loeb, 2010). Since the 1990s a number of interventions in public education–school vouchers and charter schools most significant among them–have been poor attempts at improving the efficiency of principals by introducing competition (Carnoy, Elmore, & Siskin, 2003; Carnoy & Loeb, 2002; Jacob, 2005; Ladd & Fiske, 2003; Møller, 2009). Research on these interventions reveals them to be controversial impediments to principals (Carnoy & Loeb, 2002). Competition between school leaders combined with a test-based accountability system for content standards have become a common solution in educational change efforts to improve the performance of educational systems around the world (Hamilton, Stecher, & Klein, 2002; Hanushek & Raymond, 2005; Ladd & Fiske, 2003). Realizing the need associated with the principal being an instructional leader, what are the essential qualities, characteristics, and behaviors that make an effective leader? What distinguishes the instructional leader from the traditional managerial principal?

School Environment

Effective instructional leaders promote a good school environment (Monroe, 2013). They allocate funds for materials to maximize teaching effectiveness. In addition, they selectively apply advantageous scheduling, assignment of teachers, and recognition to achieve these ends (Wallace Foundation, 2011). Respect for and trust in the faculty and staff go hand-in-hand with such suggestions. In other words, it appears that a principal must involve all personnel in improvement efforts (Silins & Mulford, 2004).

This brings up another facet of the principal's role, resourcefulness. Generally speaking, the more creative the principal, the more creative the students and faculty will be. If the principal creates ways to acquire resources and funds, faculty react in a reciprocal manner. One method to facilitate the acquisition of funds is to get everyone in the school involved in projects aimed at school improvement. If the faculty and students can realize the needs and benefits of a project, they will be more willing to do their part. Resources are available if the principal has the inventiveness to get involved in acquiring them.

Time Management

Certainly there are sharp dichotomies in the roles played by principals. Instructional leadership requires vision, a willingness to experiment, a capacity to tolerate messiness, the ability to take the long-term view, and a desire to revise systems when needed. Management leadership, on the other hand, requires oversight, the use of proven methods, orderliness, and daily attention (Horng, Klasik, & Loeb, 2009). It seems evident that the effective principal is the one that can incorporate all these facets of the role into a workable relationship.

Time spent in schools is of the utmost importance, but what principals do with their time when they are not in school also plays a role in how their schools are perceived (Green & Skinner, 2005). Attendance at club meetings and community functions is an indicator to the public that the principal is concerned about the community as a whole (Grissom, Loeb, & Mitani, 2013). These meetings are also excellent times to promote the school's activities and to promote instructional leadership. If the general public can perceive the principal as someone other than the person who stays in the office, public relations are bound to improve.

With so much emphasis placed on instructional leadership from all areas of society, why are principals reluctant to assume the role? Is there a formula that would assure possible employers that a principal is qualified in this area?

Instructional Leadership

The distinction of highly effective schools has given educators new hope that they can indeed make a difference in the lives of young people. Although there are many variables that contribute to these effective schools, one factor that seems prevalent is the role of the principal as an instructional leader (Green, 2010). Effective principals are able to convince and train teachers in ways designed to enhance their instructional effectiveness (Balu, Horng, & Loeb, 2010). Typically, this is a two-phase process. The first phase involves knowledge acquisition by the principal and teachers concerning the fundamentals of effective instruction (Horng, Loeb, & Mindich, 2010). This must be a shared knowledge to enable both parties to speak a similar language and share common experiences (Louis, Leithwood, Wahlstrom & Anderson, 2010). The second phase involves incorporating the acquired practices into daily instruction throughout the school (Mendels, 2012; Orr, 2006; Shields, 2003).

Many educators and reformers believe that the necessary skills for being an effective classroom teacher are the same skills an effective principal must exhibit (Dee & Jacob, 2011). Prospective principals are often identified because they are superior classroom teachers; however, success as a teacher does not necessarily guarantee success as a principal (Davis, Darling-Hammond, LaPointe, & Meyerson, 2005). Preparation as a teacher and expertise as a teacher does not guarantee expertise in the assessment of learning, coordinating learning activities, or developing curriculum activities (Steiner & Hassell, 2011). Consequently, many principals are not knowledgeable of the latest research and practice in curriculum and instruction because many preparation programs for administrators only highlight curriculum and instruction with minimal time given to in-depth study (Hoyle & Wallace, 2005; Wallace Foundation, 2011).

The curriculum of a school should reflect the principal's instructional philosophy (Tschannen-Moran, 2001, 2007). The principal can guide curriculum innovation and assist the staff in undertaking the changes necessary for improvement by encouraging the application of instructional innovations and development of individual teaching techniques (Levine, 2005). Teachers will not be as reluctant to try new innovations and techniques when a principal encourages instructional improvement or models the desired change (Mendels, 2012; Monroe, 2013; Wallace Foundation 2011; Yu, Leithwood, & Jantzi, 2002).

The concept of curriculum is often generic, indicating instructional directions for the school. The curriculum becomes viable through improving instructional practices of staff members in their interaction with students (Knapp, Copland, Plecki, & Portin, 2006). If faculties work in a supportive, creative climate, responding to principal modeled innovations, improved instruction will be evident (Horng, Loeb, & Mindich, 2010). This kind of school culture is evidence of effective instructional leadership exhibited by the principal (Wallace, 2011; Waters, Marzano, & McNulty, 2003). Although a new principal could be well grounded in curriculum and instruction, failure to use the skills will cause them to decay (Goldring, Huff, May, & Camburn, 2008). Principals must be able to use curriculum and instruction skills if effective instructional leadership is the goal (Darling-Hammond, LaPointe, Meyerson, Orr, & Cohen, 2007).

Human Relations

The establishment of proper human relations is a prerequisite to leading in the direction of constructive change (Barth, 2006). Those people, whom a principal would lead, will cooperate only if human interactions with the principal motivate them to collaborate (Spillane, Camburn, & Pareja, 2007). A principal's interactions with other people must create mutual trust, a feeling of partnership, high morale, and an attitude of participation (Beaudoin & Taylor, 2004). A principal who creates these outlooks has laid the human relations foundation on which better education through constructive change can be built (Grissom & Loeb, 2009).

In order to build desirable human relations, a principal must establish an atmosphere that will allow the creative talents of people in the organization to be released (Silins & Mulford, 2004). If such a positive tone exists, personnel in the school are more likely to be cooperative, effective, and enjoy their work more (Barth, 2006; Bryk & Schneider, 2003). The principal should demonstrate respect for the personalities of staff members, be concerned about them as individuals, provide opportunities for them to express their views, utilize principles of andragogy in staff development activities, consider their ideas seriously, encourage communication, provide good working conditions, and be courteous to all staff members (Leithwood, Mascall, & Strauss, 2009; Leithwood, Mascall, Strauss, Sacks, Memon, & Yashkina, 2007).

A school ought to be viewed as a collection of professional colleagues, all of whom are servants, and some of whom have special administrative responsibilities in order to free others to perform the central instructional function (Tschannen-Moran, 2001, 2007). One might also view this collegiality through the team concept with everyone pulling together for the common goals supporting the principal's student-focused vision (Murphy, 2005). Viewing teachers as members of a team, as distributed leaders, gives an added dimension to the principal's role as instructional leader (Moller & Pankake, 2006; Murphy, 2005; Spillane, 2005). The principal of a school of twenty-five or thirty teachers cannot maintain close personal contact with each individual in regard to instruction. Therefore, that principal must respond as would the coach in a crucial timeout or the sales manager giving a pep talk (Elmore, 2006; Olson, 2006; Spillane, Camburn, & Pareja, 2007). Knowing the teachers and providing the necessary motivation to accomplish the task of instruction makes everyone feel a part of the team.

Experts studying effective schools tabbed the leader of the team concept as an enabler. This type of leader enables teachers to concentrate on teaching (Reeves, 2008). He or she initiates, motivates, and supports school instructional improvement, but the teachers are left with the ultimate responsibility of teaching students (Moller & Pankake, 2006). To put it yet another way, the effective principal supports teachers (Olson, 2007). While providing resources will enhance teacher morale, teachers must also be made to realize they are capable of exercising leadership. By identifying teacher leaders within the school, the role of instructional leader is made more manageable. Sharing this responsibility with teachers that are engaged in instruction on a daily basis shifts some of the responsibility for instructional leadership to the faculty while modeling support for continued improvement. In this way, principals can make teachers feel indispensable (Spillane, 2005). Few feelings are quite as motivating as the sense that one is an essential part of an organization. Beyond providing the necessary media and instructional materials, teachers need to be shielded from the threat of public intervention or criticism. Ensuring smooth organizational processes with few disruptions and little turmoil lets the teachers know that they are being supported in their endeavors (Murphy, 2005; Moller & Pankake, 2006).

Conclusions

Merely designating the principal as instructional leader will not cause him or her to become an instructional leader. Monitoring educational processes in schools involves more than informal surveillance. Effective teaching and learning arise as a result of sustained efforts of competent professionals within schools. The leader must have vision; develop high expectations for students; develop relationships with teachers, students, parents and community members; be supportive; and enable teachers to teach and students to learn.

The educational landscape is littered with the bleached bones of well-intended reform. Will the principal's role become more educational dust in the wind of time, or can lasting change be accomplished? To bring about instructional improvement through constructive change, the principal must provide leadership in areas that vitally affect instruction. Principals can become effective instructional leaders, but the constraints in the areas of curriculum, instructional practices, expectations, and human relations must be removed because schools that operate without an instructional leader will lose their relevance and be ineffective. So, is a principal's performance constrained by reforms that call for both efficiency and effectiveness?

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