Conceptualizing middle leadership within the South African schools' context: a semi-systematic review

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Globally, there is currently no shared or decided-upon definition of middle leadership, and South Africa is no exception. This study aimed to identify and analyze empirical peer-reviewed articles on middle leadership to understand how middle leaders are defined within the South African context and propose an operational definition. The search was restricted to South African full-text English-language literature published in the last 20 years, 2004−2024. To minimize selection bias, consistent inclusion and exclusion criteria were applied following the Spar-4-SLR protocol, resulting in a total of 10 articles included for review. A semi-systematic review was conducted using Google Scholar, ERIC, and DAOJ. Thematic analysis was employed to analyze the identified articles, using NVivo 15.2. Consequently, the following three findings emerged that are presented as themes: (1) Middle leadership is conceptualized through various lenses characterized by certain similarities and connections; (2) Middle leaders operate as school managers and classroom teachers; (3) The enactment of middle leadership includes teaching and learning managers, curriculum managers, and the monitoring and controlling of teachers' work. This study demystifies the confusion of the position, albeit being clearly defined within the South African education policy documents. Presents an operational definition suitable for the South African context and calls for more South African studies in this field to realize a consensus definition of middle leadership as a distinct theoretical lens.

KEYWORDS

conceptualization, middle leadership, South Africa, context, semi-systematic review

Introduction

Middle leaders fundamentally hold qualities associated with teacher leadership in their exceptional position in schools of being knowledgeable practitioners who support and guide colleagues in their continuous professional development (Stone and Stone, 2024). The inclusion of their voices alongside executive school leader voices moves the conceptualization of school leadership away from a focus on the principal and toward a more holistic view of leadership in schools (Netolicky, 2018). Thus, the researcher (Grice, 2019) showed that they frequently lead in one context and follow in another, and as such occupy more than one community or subculture. Involving more than inhabiting an "in between" positional space (Lipscombe et al., 2021). This dual and reciprocal positionality, we argue, has made the concept of "middle leadership" difficult to define. Various scholars are in consensus that middle leadership is complex, diverse, and problematic to define, and it is best understood within context (Adams et al., 2024; Tang et al., 2023; Lipscombe et al., 2023; Lipscombe et al., 2021; Grice, 2019; Mthiyane et al., 2019; Gurr and Drysdale, 2013). Globally, there is currently no shared or decided-upon definition of middle leadership, and South Africa is no

exception. Thus, Lipscombe et al. (2021) suggest that school middle leadership should be elevated to a conclusive concept. As in their view (Lipscombe et al., 2021), this would support MLs, principals, policymakers, and researchers to steer and ameliorate practical and scholarly work in this field. Efforts have been made to define middle leadership, but the continuing uncertainty underscores the need for sustained progress and dedication to empirical research, theoretical exploration, philosophical inquiry, and developmental efforts to initiate a firm foundation for the concept of middle leadership (Grootenboer et al., 2015). Given this context, the study set out to explore the conceptualization of middle leadership in South Africa and to develop an operational definition. Therefore, situating the South African definition within the existing global literature, which is dominated by studies from the United Kingdom, Australia, and New Zealand. This concentration of research in only these countries reflects a skewed, unbalanced contribution in the field of ML (Adams et al., 2024). Moreover, the concept of middle leadership remains under-theorized with uncertainties about roles and responsibilities (De Nobile, 2018; Grant, 2019; Grootenboer et al., 2015). Thus, it has become increasingly essential to gain insight into the characteristics of ML roles and into how middle leaders navigate the intricate demands of their diverse responsibilities (Adams et al., 2024). Besides, it is critically important to strengthen research on middle leadership to advance both theory and practice in the field (De Nobile et al., 2024). This includes clearly defining the position, because eliminating ambiguity and ensuring consistency in the conceptualization of ML remains paramount. To achieve this, a semi-systematic review was conducted using Google Scholar, ERIC, and DAOJ search engines to identify South African peer-reviewed articles published from 2004 to 2024 that address the conceptualization of the phenomenon under study. To guide the review, the following research question was adopted: How is middle leadership conceptualized within the South African schools' context? Combined with the Scientific Procedures and Rationales for Systematic Literature Reviews search strategy.

Literature review

The concept of "middle leadership" in the global context

Globally, literature is awash with the conceptualization of in-school middle leadership by various scholars in different contexts (from the Chinese context, Tang et al., 2023; from the Australian context, Grootenboer and Edwards-Groves, 2020; from Australia, Chile, and Singapore, Gurr, 2019; from the Israeli context, Shaked, 2024; from the Canadian context, Hargreaves et al., 2018; from Malaysian context, Ghavifekr, 2021; from New Zealand, Cranston, 2007). Furthermore, Lipscombe et al. (2023) reviewed 35 articles across 14 countries to develop an operational definition to advance the field of middle leadership. Although the focus of this review is on the South African context, we found it imperative to succinctly delve into how middle leadership has been conceptualized globally by depicting a few definitions.

> "School middle leaders are formally appointed leaders, with accountable responsibilities, who operate between senior leaders

and teachers, and lead in order to positively impact teaching and student learning" (Lipscombe et al., 2021).

> "A key driver of educational change through leading professional learning and curriculum development. Middle leading is a communicative and responsive practice that facilitates active learning and participation in discussions about complex and often challenging educational issue" (Grootenboer and Edwards-Groves, 2020).

> "Regards those in the middle not just as a mediating layer that connects the bottom to the top, but as expressing and addressing the heart and soul of leadership at its core. Is not just a level or a tier. It is the heart, the soul, the backbone, and the guts of leadership" (Hargreaves and Shirley, 2020).

> "Middle leaders, best described as educators working in classrooms while also leading in additional areas such as curriculum, year level cohorts and faculties and have been identified as important to developing teacher practice" (Gurr, 2019).

> "Middle leaders are teachers who have an additional formal organizational responsibility, with this typically having a curriculum (e.g., in charge of a learning area) or pastoral (e.g., in charge of a year level) focus" (Gurr and Nicholas, 2023).

Under these definitions, principals, deputy principals, and teachers are not included; for example, teachers are excluded because they do not occupy roles classified as positions of formal responsibility (Gurr and Nicholas, 2023). This implies that teacher leaders will often be excluded if they too are defined as lacking a formal position of responsibility (Gurr and Nicholas, 2023). Within the sphere of South African schooling practices, teacher leadership is often exercised by teachers given informal responsibilities, such as "grade leaders," leading a particular grade and reporting back to the middle leader. Others are given the responsibility of being "subject coordinators," especially when the middle leader lacks expertise in a particular subject under their department (Madonsela and Proches, 2022; Malinga, 2016). What appears to be a crucial difference between teacher leadership and middle leadership is the formalization of MLs' roles and the level of accountability involved (Gurr and Nicholas, 2023). Given the reasons above, the envisaged operational definition of middle leadership that is proposed by this study will not include teacher leaders. It is important to note that the study's aim is not to compare the constructs of teacher leadership and middle leadership, but to conceptualize "middle leadership" within the South African schooling context. However, because the ML field is still emerging and the two concepts share significant similarities, a substantial portion of middle leadership research is informed by studies on teacher leadership (Lipscombe et al., 2021).

Demystifying the confusion of middle leadership in South Africa

It is important to clarify that within South Africa's basic education ministry, Heads of Department (HODs) in provincial education

departments are senior officials tasked with managing the daily operations of education in their province, as outlined in the Personnel Administrative Measures (Department of Education, 1999). They are responsible for executing national education policies at the provincial level, supervising school administration, and overseeing resource allocation. This role is frequently mistaken for that of departmental heads (DHs) who lead teams at the school level (Department of Education, 1999) and serve different functions within the basic education system. This misguided classification is evident in studies by Malinga et al. (2021), Mthiyane et al. (2019), and Naidoo (2019), among others. To further compound the confusion (Kubheka, 2022), while investigating middle leaders from five public primary schools in Gauteng, South Africa states that "Middle leaders are also known as heads of department or more recently reclassified as departmental heads." The scholar missed an opportunity to make a meaningful contribution to the conceptual framework of middle leadership in South Africa but instead opted for the old classification that has been removed from the official policy documents Personnel Administrative Measures (Department of Education, 1999) and Employment of Educators Act (EEA 76 of 1998), more than 25 years ago and refers to such as "recent classification." The distinction between the two ranks must be clearly delineated to demystify the confusion. The HODs operate at the provincial level, while the DHs are school-based. Skerritt et al. (2023) further explain that departmental heads are members of the middle leadership in schools, operating at the managerial level and the teachers below them. It is from this premise that in this study departmental heads are referred to as middle leaders, because they are members of middle management in schools. Moreover, for as long as senior leadership in schools is also referred to as top management, it goes without saying that middle management also exists within the schools' leadership organograms. Therefore, framing departmental heads as middle leaders is deemed appropriate to position the South African definition within the existing international literature. Furthermore, we argue that the continuous labeling of middle leaders as "Head of Departments" has resulted in the South African contribution to the field being "swallowed" by the Western context. For example, a review by the Australian Institute for Teaching and School Leadership (AITSL, 2023) could only locate one study conducted in Lesotho by Tlali and Matete (2021), and none in South Africa. To further highlight a discouraging outlook, no South African study was included in the systematic review by Lipscombe et al. (2023) involving 14 countries. A similar pessimistic perspective was underscored by the bibliometric analysis approach (Adams et al., 2024).

The concept of "middle leadership" in the South African schools' context

Within the realm of middle leadership in South African schools, there is contention on how middle leadership should be defined, and this is not surprising because even global middle leadership scholars have not reached a consensus on the definition. This disagreement in the view of Smit (2006) stems from the fact that the concept of "middle leadership" in South African schools is complex and multifaceted, influenced by historical, organizational, and personal factors. Makoelle and Makhalemele (2020), is in accord and further asserts that middle leadership is conceptualized differently in SA schools based on teachers' background, with political leadership more

dominant than professional leadership. This observation confirms how politics and political affiliation influence educational matters in some parts of South Africa, and that has resulted in a delay in advancing an agreeable definition. Heystek and Lumby (2011) attributes the lack of a common contextual conceptualization of middle leadership to the South African school leaders, who in his analysis have a limited conceptualization of diversity and their own identity, which has implications for leadership in ethnically diverse schools. Also, Perumal (2007), while exploring the conceptualization of school leadership in post-apartheid South Africa, suggests that school leadership needs to address power differentials and promote leaderful practices. In our view, we must incorporate middle leaders since they form an integral part of the school management team. We further posit that the position must not be defined within the confines of power but rather based on what the position demands. Therefore, addressing all the contextual factors hindering the conceptual development of this position remain significant since the conceptualization of middle leadership in South African schools is underdeveloped, with research in this area being largely descriptive rather than explanatory, as underscored by Grant (2019).

While scholarly efforts are being made for the realization of a universal definition of middle leadership, Evans (2016) maintains that conceptualizing leadership in schools as "middle" role is outdated, and that leadership should be viewed as distributed and shared, rather than vested in the principal. We differ with this view because leadership in schools is shared between the principals, deputies, and middle leaders through their different but connected roles. What differs is their levels of accountability, with the principals being the sole accounting officers to the provincial education departments. Therefore, positioning middle leadership within the school's leadership remains significant since it will clarify their role and build toward how the position should be defined.

Most South African studies on middle leadership fail to conceptualize this position, but instead concentrate on their challenges and roles. To illustrate, a study by Bush and Glover (2016) does not directly address how middle leadership is conceptualized in South African schools, but it provides a systematic review of research on school leadership and management challenges in South Africa. Similarly, studies by Madonsela and Proches (2022), Pavlopoulos (2021), Harris et al. (2017), and Nxumalo (2009) discusses the expanded roles and importance of ML in schools, and how ML can make a difference in schools by having a clearly defined roles and support from the school. To this end, literature further confirms the challenges of leadership identity and role clarity within this field (Kubheka, 2022; Naidoo, 2019). Hence, we posit that understanding the core roles and responsibilities of middle leaders in South African schools can provide valuable insights into how to better conceptualize their position. Regarding Hung and Lim's (2022) study focusing squarely on the Singapore education system, particularly on school-to-school networks and teacher leadership, the scholars maintain that ML in schools should be conceptualized as involving teacher leadership, systematic thinking, and a trust relationship between school and teacher leadership. Numerous South African studies have fallen into a similar trap of describing middle leadership as teacher leadership (Van der Vyver et al., 2021; Makoelle, 2012; Ntuzela, 2008; Grant, 2005), a confusion that we have vehemently dispelled in the previous segments, and resolved by Gurr and Nicholas (2023) through a model to distinguish them.

Semi-systematic literature review methodology

Different types of review methodologies, namely systematic, semi-systematic, integrative, etc., can be employed depending on the purpose and the quality of execution (Polat, 2021). This study adopted the semi-systematic review to investigate how the conceptualization of middle leadership within the South African schools' context has evolved (Snyder, 2019). This methodology was considered pertinent because it is designed for topics that have been conceptualized differently and require greater breadth and flexibility than the conventional systematic review protocol provides (Snyder, 2019). This semi-systematic literature review used three search engines: Google Scholar, ERIC, and DOAJ. The former was used because is a widely recognized and accessible academic search engine that offers comprehensive coverage across disciplines, making it an ideal tool for scholarly research (Harzing, 2010). ERIC was selected due to its status as the most extensively utilized database for sourcing educational research and scholarly literature globally. Unlike traditional databases that may require subscriptions, DOAJ is freely accessible and promotes unrestricted access to scholarly research. To gain a richer understanding of the conceptualization of middle leadership, gray literature (theses, in this case), which is often not well represented in scientific indexing databases, was integrated into the discussion to enrich the findings (Hewett et al., 2023). Furthermore, these materials fill crucial gaps in scholarly discourse, and excluding them can lead to publication bias, incomplete evidence bases, and limited applicability of findings (Lund and Pieper, 2024). The search was restricted to full-text literatures in English published in the last 20 years, 2004–2024, this timeline allowed us a greater breath to establish how the topic evolved over the period within the South African context.

Semi-systematic methodologies do not follow strict protocols like PRISMA (Zunder, 2021), hence in this study Scientific Procedures and Rationales for Systematic Literature Reviews (SPAR-4-SLR) was adopted. Firstly, to minimize selection bias by applying consistent inclusion/exclusion criteria, and improved rigor (Grant and Booth, 2009). Secondly, because of its boundless applicability for reviews seeking to contribute theoretically (Paul et al., 2021). Although semi-systematic review articles lack a predefined research question, Demiris et al. (2019) we took a different approach for this study. Our review was guided by a research question that provided a conceptual anchor that guides the assembling, arranging, and interpretation of literature (Grant and Booth, 2009). Thus, increasing the transparency of the review process by making it easier for readers to understand the scope and the rationale. At the core of the SPAR-4-SLR process are the three central phases: assembling, arranging, and assessing. To simplify the phases, the assembling phase incorporates identification and acquisition, the arranging phase includes organization and purification, and the assessing phase combines evaluation and reporting. The initial search of literature showed that middle leadership in South African schools is defined differently and often conflated with teacher leadership. Figure 1 below depicts the Spar-4-SLR protocol used in this study.

Arranging

This review looks at English-language research articles published in peer-reviewed journals and theses that forms part of gray literature

that were based on real data and describing middle leadership. Documents spanning 2004–2024 that contextualize middle leadership in the South African school context were selected. Titles and abstracts were analyzed to verify suitability, and studies that conceptualize middle leadership even though their focus was not mainly on defining the phenomenon were included. Criteria for exclusion were defined to guarantee that only related documents were included in this review. Primarily, conference papers, conceptual papers, editorials, books, and book chapters were excluded from the review. Then, research centered on teacher leadership was deliberately excluded to maintain a clear emphasis on the concept of middle leadership. This also includes studies that were not empirical. After the purification process, ten articles that describe middle leadership specifically in various south African schooling context were retained for review. This screening process is illustrated in Figure 1.

Data extraction and analysis

We applied thematic analysis in this semi-systematic study, by familiarizing ourselves with the data, from the selected empirical studies, to gain a deep understanding of the content as accentuated by Braun and Clarke (2006). Throughout the process, NVivo15.2 was utilized to generate and organize initial codes of the selected studies according to their features by identifying meaningful phrases of data that relate to the study's research question. In this case, dataset was extracted from the empirical studies that included the following characteristics (authors, study design, school context, focus area, middle leadership description), which were tabularized. To search for themes, phrases were grouped into broader patterns that capture significant concepts that relate to middle leadership across the included dataset (Braun and Clarke, 2021). The themes were subsequently identified, reviewed and refined ensuring that they explicitly describe middle leadership as a standalone construct, and supported by the data (Nowell et al., 2017). Each theme contributing to the overall analysis was subsequently defined and named, enunciating the crux of what each theme represents to the conceptualization of middle leadership within the South African context. In maintaining analytical depth and transparency, findings are presented in a way that aligns with semi-systematic framework by weaving together words and phrases from selected empirical studies (Braun and Clarke, 2021) (Table 1).

Findings

Studies characteristics

After identifying the 51 articles that fall within the timeframe, 2004–2024, the primary step was to include and review the empirical studies that conceptualize middle leadership within the South African schools' context. The accrued dataset indicated that the empirical studies took place within the four provinces of South Africa, with Gauteng province dominating with five studies (i.e., Malinga et al., 2021; Tapala, 2023), Limpopo (Ogina, 2017; Mudau et al., 2024), and Kwa-Zulu Natal (Buthelezi et al., 2020; Malloy, 2017). Provinces with two studies each, followed by the province of the Free State with one study (Kalane and Kambuda, 2022). Seven of the studies were qualitative in nature, two, quantitatively designed, and one study utilized the mixed
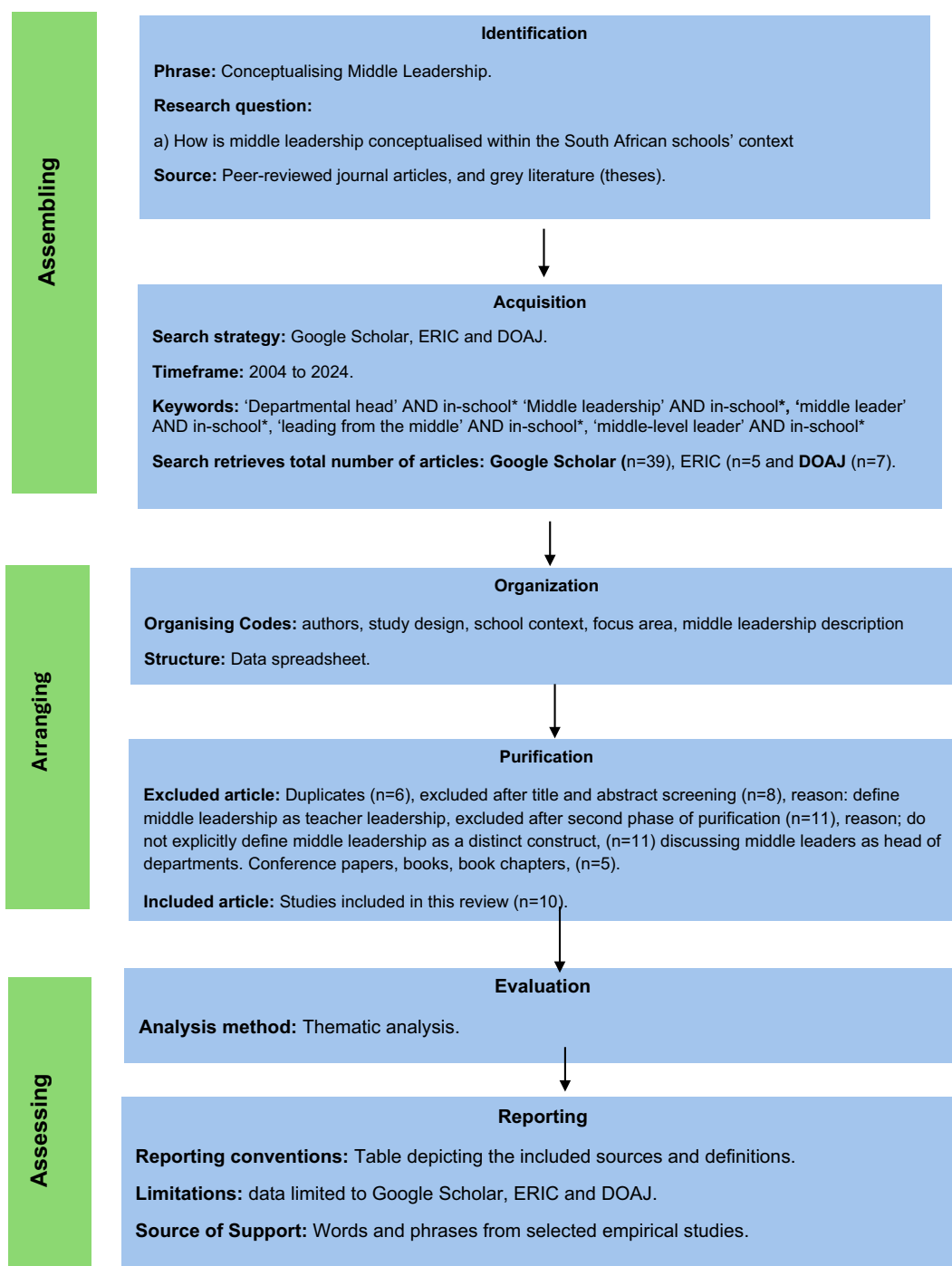
FIGURE 1
The flowchart of SPAR-4-SLR protocol.

method approach. Both the studies under review span across six primary and four secondary schools, respectively, involving 251 middle leaders as participants. It is also worth stating that although middle leaders were the main subjects in all the studies, some studies also included teachers as part of the sample (Malinga et al., 2021).

Various middle leadership lenses

The findings further revealed that middle leadership is viewed from various lenses. For example, Malloy (2017) focused on

Mathematics using the instructional leadership lens, Munje et al. (2020) concentrated on the teaching and learning of Science and Mathematics, also from the instructional leadership view, and Malinga et al. (2021) had a spotlight on Natural Sciences middle leaders, similarly from the instructional leadership point of view. Although not subject specific, Ogina (2017), delved on how middle leaders enact their instructional leadership roles, focusing on five secondary schools. Du Plessis and Eberlein (2018) and Buthelezi et al. (2020) gave attention to the role of middle leaders in the professional

TABLE 1 Reviewed studies.

Authors	Study design	School context	Focus area	Middle leadership description
Malinga et al. (2021)	Quantitative	77 secondary schools, involving 30 ML (Gauteng Province)	To measure instructional leadership capacity of natural sciences ML	Natural sciences middle leaders navigating the challenges of managing from the middle and providing instructional leadership
Tapala (2023)	Qualitative	6 primary schools, involving six ML (Gauteng Province)	Explored how departmental heads (ML), who are both subject specialists and middle managers—navigate their "amphibious existence"	Described as occupying an "amphibious" role—straddling both teaching and leadership responsibilities. They serve as bridges between school management teams (SMTs) and classroom teachers
Ogina (2017)	Qualitative	5 secondary schools, involving 9 ML (Limpopo Province)	Focused was on Middle Leaders (ML) in, examining how they perceive and enact their instructional leadership roles	Task orientated, focused on monitoring and controlling teachers
Buthelezi et al. (2020)	Quantitative	105 primary schools, involving 88 ML (Kwa-Zulu Natal Province)	Explored management role of Heads of Departments (HoDs) pertaining to professional development of teachers at female-dominated primary schools in South Africa	Middle managers within the school hierarchy responsible for managing teachers under their jurisdiction expected to facilitate professional development, improve teaching quality, and support curriculum delivery
Jaca (2021)	Qualitative	7 primary schools, involving 15 ML (Gauteng Province)	Explored the key challenges DHs encounter as they shift from being classroom teachers to middle managers	Teachers promoted to a middle management level—positioned between senior management and classroom teachers in the school hierarchy
Kalane and Kambuda (2022)	Mixed methods	20 primary schools, involving 70 ML (Free State Province)	Explored the key factors that affect how Departmental Heads (DHs) manage teaching and learning	Middle managers within the school structure tasked with managing teaching and learning in their respective phases or subject areas
Malloy (2017)	Qualitative	3 secondary schools, involving 3 ML (Kwa-Zulu Natal Province)	Explored how ML enact their instructional leadership roles specifically within the context of mathematics teaching and learning	Middle managers within the school hierarchy, specifically tasked with overseeing curriculum delivery and instructional quality in their subject areas—in this case, Mathematics
Munje et al. (2020)	Qualitative	4 secondary schools, involving 13 ML (Gauteng Province)	Explored the roles of ML to determine how opportunities were created for teaching and learning science and mathematics in the context of distributed leadership	Middle managers who operate within a distributed leadership framework, sharing leadership responsibilities with the principal
Mudau et al. (2024)	Qualitative	3 primary schools, involving 9 ML (Limpopo Province)	Explored how ML manage the constraints that hinder them from effectively fulfilling their role	Multi-role educators who function not only as classroom teachers but also as supervisors, coordinators and curriculum managers
Du Plessis and Eberlein (2018)	Qualitative	4 secondary schools, involving 8 ML (Gauteng Province)	Focused on understanding the role of ML in the professional development of educators within South African schools	Middle managers who serve as a vital link between school principals and classroom educators

development of teachers. The findings further confirm that Jaca (2021) and Mudau et al. (2024) deliberated to the transitional constrains hindering middle leaders in effectively enacting their role. Tapala (2023) dwelled on the various levels that middle leaders operate within, and lastly, Kalane and Kambuda (2022), gave a report on how middle leaders manage teaching and learning. These included studies, apart from their varying approaches, managed to isolate and conceptualize middle leadership as a distinct theoretical construct.

Conceptualization of middle leadership within the South African schools' context

On how ML is conceptualized, the findings of the review revealed that teachers, management, leadership, and classroom were the strong phrases at the core of the middle leadership description, with the definitions situating middle leaders between the school management team and the classroom teachers (Malinga et al., 2021; Jaca, 2021;

Tapala, 2023). Between the principal and classroom teachers (Du Plessis and Eberlein, 2018). The other phrases that emerged from the findings regarding the conceptualization of middle leadership relate to how management is enacted by the middle leaders. The following was revealed: management of teaching and learning (Kalane and Kambuda, 2022), curriculum managers (Malloy, 2017; Mudau et al., 2024), the managing of teachers (Buthelezi et al., 2020), and the monitoring and controlling of teachers (Ogina, 2017). Defining middle leadership from the "shared leadership" perspective, as suggested by Munje et al. (2020), was found to be the second least phrase attached to the definition of ML. Similarly, there was less emphasis on the phases or subject areas (Kalane and Kambuda, 2022; Munje et al. (2020)). That also included educators and quality phrases. Not spurring, middle management level appeared the least phrase on how middle leadership is conceptualized within the South African schools' setting. In the end, the phrases were merged to develop the

study themes that guided the discussion of the findings. The phrases are illustrated in the chart below (Figure 2).

Discussion

The purpose of the study was to investigate how middle leadership is defined within the South African schools' context between 2004 and 2024, using the semi-systematic literature review methodology. This segment presents an interpretation of the review findings, aligning them with the study's research question to highlight key insights and connections in the definition of middle leadership. The discussion is guided by the themes that emerged during the literature review and analysis and could inform the development of an operational definition of middle leadership within the South African schools' context.

Theme 1: The conceptual framing of middle leadership through various lenses

Middle leadership studies in the African continent are limited (Adams et al., 2024), and South Africa similarly exhibits this trend. As such, the scant middle leadership studies conceptualize middle leadership as a distinct construct. This lacuna, in our view, stems from the fact that most studies treat middle leadership as teacher leadership (Grant, 2005; Ntuzela, 2008; Makoelle, 2012; Van der Vyver et al., 2021). This has exacerbated the misperception that currently exists regarding the definition, and therefore, starving the advancement of conceptualization of the phenomenon within the South African context. As a result, the conceptual framing of middle leadership is constructed through various lenses. To demonstrate, the apprised literature also revealed the similar findings (Malinga et al., 2021) define middle leadership through the instructional leadership lens. The similar stance adopted by Chabalala and Naidoo (2021), though they

present a clear conceptual framing of middle leadership. Ogina (2017) resonates with instructional leadership in conceptualizing middle leadership and further emphasizes that this level of leadership is typically more prominent in secondary education, where departmental structures are more formalized. In the South African schooling system, middle leaders in secondary schools may oversee one subject or more, whereas in primary schools, they lead phases (e.g., foundation, intermediate, and senior) comprising several subjects that are framed as learning areas at that level. As it stands, there is no clear consensus definition of middle leadership in South Africa, and that is further confirmed by research by Smit (2006) and Makoelle and Makhalemele (2020), who established that middle leadership is defined differently in South African schools. This can be attributed to the various phrases that have been adopted by a few scholars from different contexts, though one can argue that most of the South African schooling contexts share similar characteristics, further confirming that context matters when conceptualizing middle leadership. Adams et al. (2024) are in accord and acknowledge that middle leadership is difficult to define because the roles are fluid and context-dependent, varying across schools and systems. Tapala (2023) mentions that middle leaders serve as bridges between school management teams (SMTs) and classroom teachers, facilitating communication, enforcing policy, and leading subject-specific departments. Kubheka's (2022) thesis places middle leadership between the senior management team and the teaching staff, making it also a standalone position existing within the school. This limited contribution has made the concept of middle leadership in the South African schooling system misunderstood and misconceptualized as teacher leadership and head of department.

Theme 2: Middle leaders operate as school managers and classroom teachers

Most of the empirical studies reviewed position the middle leaders between the senior management and the teachers, and
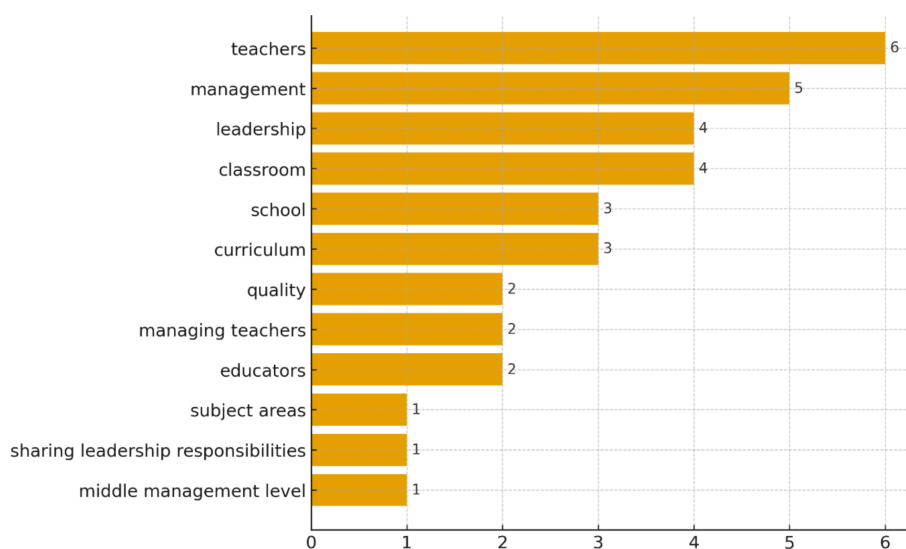
FIGURE 2
Chart depicting the phrases.

between the management of the school and the classroom. This resonates with the existing literature (AITSL, 2023; Gurr, 2019) that it is necessary for middle leaders to lead management, referring to both for teachers and for the school, and operate between senior leaders and teachers (Lipscombe et al., 2021). Put differently, they usually lead in one context and follow in another, and as such occupy more than one community or subculture (Grice, 2019). With the classroom being one of the spaces where they exercise their managerial and leadership roles, and as suggested by Leithwood (2016), when they work with their team and work with senior leaders, they will become effective leaders. Although managing this balance can be demanding, it positions middle leaders uniquely within the school framework, enabling them to serve as mediators who bridge different components with the broader school leadership structure (Nehez et al., 2022). Therefore, management remains an integral phrase when conceptualizing middle leadership as suggested by the findings and the reviewed literature. This includes leadership that is enacted by most middle leaders who are vastly experienced teachers who continue to hold classroom teaching responsibilities alongside their middle leadership role (Lipscombe et al., 2023). It is for this reason we purport that referring to middle leaders as "teachers" further compound the misunderstanding of this position. Therefore, removing the word "teachers" from the definition of these uniquely positioned leaders may clarify and enhance understanding. This is despite the findings revealing that the "phrase" teacher was one of the dominating in the definition of the concept middle leader.

Theme 3: Enactment of middle leadership

In relation to the findings of the study, the enactment of middle leadership in South African schools, included teaching and learning managers, curriculum managers, and monitoring and controlling of teachers' work. These three phrases were visible in some of the definitions that were captured in the South African literature and were merged to constitute the current theme. How this role is enacted also influenced how some of the definitions were framed, and these findings are congruent with established empirical evidence, where Nehez et al. (2022) argue that for middle leaders to be regarded as credible, they should display high levels of teaching and learning expertise. Managing and teaching and learning remains at the core of middle leaders' role, therefore the definition of this position should also resemble such elements among others as indicated by the empirical evidence. Like the management of curriculum (White, 2001; Gurr, 2019) maintain that middle leaders must evolve into curriculum strategists, entrusted with shaping the overarching vision and guiding the strategic direction of the curriculum. Middle leaders are curriculum leaders within their respective departments and phases, and are also expected to control and monitor teachers' work to ensure that the curriculum is closely monitored and successfully operationalized.

Our review found that middle leadership is conceptualized differently in South African schools. Considering this, we affiliate with Lipscombe et al. (2021) stance that school middle leadership should be elevated to a definitive concept. As a result, a South

African definition of middle leadership as a distinct construct will eliminate the erroneous existing conceptualization of middle leaders as "Head of Departments." The labeling that dominates South African literature. A clear definition of the concept middle leadership will assist in ensuring that the professional development of middle leaders is not misperceived with teacher development but instead be treated as unique and standalone position. Furthermore, this would position the South African definition within the international literature and thus, its visibility can be enhanced. Drawing upon the outcomes of the review, and Lipscombe et al. (2021) definition, we propose the following South African operational definition.

> *In-school middle leaders are leaders holding formal leadership positions positioned between senior management and classroom teachers, with a mandate to manage and oversee curriculum implementation in ways that enhance and promote teaching and learning outcomes.*

Limitations

The study focused on the research that stated "departmental head" and "middle leader," leaving out research that mentioned "Head of Department," even though the latter is the common label used in South African research. This might have starved the pool of studies that ended up being included in the review, notwithstanding the limited literature available in the field, particularly within the South African context.

Conclusion

In summary, the review confirmed that middle leadership is defined differently within the South African context, although characterized by certain similarities and connections. More studies are required in South Africa in this field to achieve a consensus definition of middle leadership as a distinct theoretical lens. The reviewed studies focused on conceptualizing middle leadership and served as a foundation for a unifying definition. To the best of our search, review, and knowledge, we could not locate a single South African study seeking to conceptualize in-school middle leadership as its main emphasis. This study serves as groundwork by contributing an operational definition to the scant existing literature within the South African schooling landscape.

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MM: Conceptualization, Writing – original draft. ML: Methodology, Writing – review & editing.

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