LIVING WITHIN REFORM:
A PHENOMENOLOGICAL STUDY OF THE LIVED EXPERIENCES OF
TEACHER LEADERS IN HIGH SCHOOLS

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by
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This is a phenomenological study of the experiences of three teacher leaders in the context of high school reform. It examines the essence of teacher leadership and how these teacher leaders made sense of their experiences. At the outset is a portrayal of my position and connection to the phenomenon of teacher leadership. This study reviews literature within three distinct areas. First, the nature of school reform is examined, including the rationale for reform, the challenges associated with reform, how to achieve sustainable reform, and a review of six drivers for effective reforms. Then, an investigation of distributed leadership follows which includes a discussion of the processes and forms of distributed leadership and a description of the facilitators and tensions for distributed leadership. The third area of the review is focused on teacher leadership including the roles and characteristics of teacher leaders, their connection to staff development, issues of effectiveness, and tensions for teacher leaders. Following this review, the research design and methodology is presented. Transcendental phenomenology including the concepts of phenomenological reduction and imaginative variation are explored in detail. Protocol writing was utilized to select participants for this study. From collected writings by formal teacher leaders, participants suited for phenomenological research were selected. Three teacher leaders participated in in-depth, semi-structured interviews. The interviews were transcribed by the researcher. Participants shared their experiences as teacher leaders. Additional questions were asked to elicit more details about their experiences and to find out how participants made sense of their experiences. In the experiences of the participants, five themes emerged: Grappling with teacher leadership identity, facing the uncertainties of sustaining the reform initiative, negotiating the tensions between management and leadership,
experiencing challenges of leading, and feeling the empowerment of success. Participants made sense of their experiences in these four ways: learning, communicating, doing, and reflecting. Several forces that impact the experience of teacher leadership and facilitate the formation of teacher leadership identity emerged. Through the process of making sense of their experiences, teacher leaders came to understand theory, which they termed “getting it”, and then enacted their learning. The ways in which teacher leaders made sense of their experiences were influenced in part by their leadership persona and in part by the culture and context within which they lived. Among the implications for theory from this study is that more needs to be learned about the leadership identity of teacher leaders leading reforms. Implications for practice include the provision of time for teacher leaders to reflect on and discuss their experiences, as well as the provision of professional development focused on change praxis and leadership praxis for teacher leaders and instructional leadership for in-school administrators. Among the implications for research are the need to investigate teacher leaders’ association with administration, both in their aspirations and in how they are perceived towards administration, the cognitive changes that occur for teacher leaders, whether a context of instructional leadership eases tensions in teacher leadership, and whether formal teacher leader roles are an effective way for school divisions to plan for leadership succession. In addition, the phenomenological research method is reflected upon.
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CHAPTER 1
INTRODUCTION TO THE PROBLEM

As school improvement efforts have become a focus in education (Elmore, 2000; Hopkins, 2007; Reeves, 2008; Sharratt & Fullan, 2006) challenges regarding how to implement these reforms have surfaced. Pellicer and Anderson (1995) stated “just as morality cannot be legislated, change cannot be mandated” (p. 204), indicating that a top-down approach to reform would be ineffective. Rather than imposing change upon teachers, Bogler (2005) found that teacher commitment is required for effective school restructuring, and teachers must be empowered to make decisions about the work of teaching and learning. In the context of reform, teacher leadership may empower teachers, encouraging teacher commitment for change.

A related challenge found by key researchers in the area (Elmore, 2000; Reeves, 2008) is that reforms in education are difficult to sustain. In order to sustain educational change, effective leadership structures must be in place. Schools and school systems have traditionally relied on heroic leaders to initiate change and improvement (Elmore, 2000; Hargreaves & Fink, 2006; Leithwood, Mascall, Strauss, Sacks, Memon, & Yashkina, 2007). Unfortunately, heroic leadership is not sustainable (Hargreaves & Fink, 2006), as such individuals may be difficult to find, hard to maintain, and impossible to replace. Instead of relying on heroic leadership to carry out reforms, a new leadership structure is required.

Proponents of school reform advocate the implementation of distributed leadership to facilitate restructuring (Elmore, 2000; Hargreaves & Fink, 2006; Leithwood et al., 2007). Elmore (2000) stated, “large scale improvement requires concerted action among people with different areas of expertise and a mutual respect that stems from an appreciation of the knowledge and skill requirements of different roles” (p. 35-36). Using a model of distributed
leadership nurtures teacher leaders who are committed to teaching and learning and to their organization, and the energy of these dedicated teachers will help to move reform initiatives forward. As well, distributed leadership develops capacity (Hargreaves & Fink, 2006), cultivating new leaders who will emerge to help sustain reform. It appears that teacher leadership is a crucial component of the distributed leadership model. However, Angelle and Schmid (2007) observed that although scholars agree that teacher leadership is essential in improvement initiatives, scholars do not agree on what characterizes a teacher leader.

In light of the above comments, more needs to be learned about the phenomenon of teacher leadership, and the common experiences of teacher leaders. Within the context of effective reforms, the roles, responsibilities and issues associated with teacher leadership require further investigation. In this respect, Leithwood et al. (2007) identified a number of related questions for research:

Those to whom leadership is being distributed already have full-time jobs; how will they apportion their time to take on these additional functions? We cannot assume much opportunity for nonadministrative leaders to become skilful in the exercise of those leadership functions which they assume or are expected to take on; how will they develop the new capacities they need? Some administrators may value the power they have over decisions in their organizations and be reluctant to share that power with others; how can these concerns be addressed? (p. 61)

These questions deal with tensions in distributed leadership that are of considerable importance to me, and they relate to the experiences of teachers. My research addresses some of the challenges in distributing leadership, and gives educators and policy makers relevant, useful information to be used in implementing school reforms through distributed leadership.
Within the context of school reform that embraces distributed leadership, there are several phenomena that may arise for teachers. To begin, the identification of teacher leaders becomes an issue in this context. Are teacher leaders identified by administrators or do they self-identify? What are the common qualities of teacher leaders? Additionally, the role of the teacher may change in this context. Will teacher leaders’ relationships with their colleagues change by virtue of their formal role? How will teacher leaders and administrators work together? Will teacher leaders’ relationship with their students be impacted? As well, teacher identity may be impacted in this context. Will teacher leaders change their classroom practices? How are teacher leaders motivated? These are important questions, and an examination of the literature reveals that although a great deal is known about what structures, processes and frameworks are necessary for change in schools, there is much less known about how these changes are implemented by teacher leaders, and why teacher leaders act as they do (Spillane, Halverson, & Diamond, 2001). It is hoped that my examination of the lived experiences of teacher leaders in the context of a reform initiative that employs distributed leadership begins to address the above questions.

**Purpose of this Study**

The purpose of this study was to examine the experiences of teacher leaders who were involved in a teacher leadership initiative in the context of high school reform. Using a phenomenological lens, an inquiry was conducted into the essence of teachers’ lives as teacher leaders and into how teacher leaders made sense of their experiences.
Research Questions

The primary objective of this research was to explore the experiences of formal teacher leaders in the context of one Saskatchewan urban school division involved in a high school reform initiative. The following research questions focused the study:

1. What are selected teacher leaders’ experiences in a selected high school reform initiative?
2. In the context of this specific reform initiative, how do participating teacher leaders make sense of their experiences?

Importance of this Study

A deeper understanding of teacher leadership in the context of high school reform may enable educators and policy makers to make more informed decisions about the development of teacher leader programs, the facilitators needed for teacher leadership, and a greater understanding of what it means to be a teacher leader. Although this research is primarily a window into the experiences of teacher leaders, the contexts of high school and of school reform are pervasive, and certainly influence teacher leaders’ experiences.

A number of researchers have found that distributed leadership is a key driver in reform efforts (Elmore, 2000, Hargreaves & Fink, 2006; Reeves, 2009). The literature on distributed leadership and teacher leadership seem to be inextricably linked, and a number of researchers have indicated the need for further investigation of teacher leadership (Frost & Harris, 2003; Margolis, 2008; Spillane et al., 2001). From their research, Spillane et al. (2001) found that the literature’s understanding of leadership is incomplete, because although research has documented what leaders do, it is missing an “understanding of how and why they do it” (p. 23). My study sought to examine teachers’ experiences, and find out how they perform their role as a teacher leader, and what motivates them to do so. In an article exploring the need for further
research on teacher leadership, Frost and Harris (2003) uncovered a number of issues within the phenomenon of teacher leadership that need clarification in the research, including further investigation into what teacher leaders perceive their role to be, and the part that the organizational environment, structure and culture impacts teacher leaders in their work. Understanding teacher leaders’ experiences in the context of a high school reform initiative may help to inform what part teacher leaders play in this context, and how they are impacted by the organization and relationships that exist around them. Researchers who have studied teacher leadership in the context of high school reform have focused on teacher leaders’ orientation to teaching and their effectiveness (Firestone & Martinez, 2007; Little, 1995) rather than their experiences. The gap in the literature still seems to exist; Margolis recently (2008) noted the need for future research that investigates understanding of teacher leadership practices. To start to fill this gap, my study considered teacher leaders’ descriptions and characterizations of the formal teacher leader role in the context of high school restructuring. The data collected and presented here is their experiences which includes the incidents, feelings, and tensions that teacher leaders lived through in the context of the reform initiative.

**Initial Definitions Applicable to this Study**

A phenomenological study focuses on the lived experiences of the study participants. This depends significantly on their view of the world, and therefore, on their interpretations of educational terminology. For the purposes of clear communication, initial definitions applicable to the study include:

Distributed Leadership: In this study, the definition offered by MacBeath (2009) will be utilized: In school environments with distributed leadership the members of the organization,
regardless of their status or position, are prepared to take the initiative and assume responsibility as required to accomplish the goals of the organization.

High School: For the purposes of this study, an urban school comprising grades 9 through 12.

High School Reform: Of key importance within this study is the concept of high school reform, which is a shift that endeavors to enact systemic change in high school structures and common high school educational practices, making learning more authentic, collaborative, and engaging (Daniels, Bizar, & Zemelman, 2001).

Reform Initiative: For the purposes of this study, a reform initiative is a large-scale plan to change an entire school division (Fullan, 2003).

Teacher Leader: The term teacher leader represents a teacher who exercises leadership daily by influencing their colleagues. Teacher leaders influence their colleagues toward improved assessment, instruction and classroom management (Reeves, 2008). Besides having these characteristics, in this study, being a teacher leader means that a teacher has been designated a formal role as a teacher leader in their division.

Powerful Learning Models: Based on research, instructional strategies (for example, identifying similarities and differences, using cooperative learning, and providing non-linguistic representations) which improve student achievement (Marzano, Pickering, & Pollock, 2001)

**Delimitations**

This study focused on high schools, and the experiences of high school teacher leaders. Through purposeful sampling, three participants were selected, and in-depth, semi-structured interviews were conducted. The data collected represents the experiences of selected teacher leaders.
leaders from one urban school division in Saskatchewan. The data was collected between February, 2010 and June, 2010.

Limitations

The study was limited by participants’ readiness and ability to describe their experiences, remember past experiences, and recount and convey their experiences during the interview. The process of protocol writing, by which the researcher was able to review written accounts of experiences provided by potential participants, served as a means by which this limitation could be addressed.

Assumptions

Patton (1990) noted that in conducting phenomenological research, there is an assumption being made that there is an essence to the shared experience of the phenomenon being studied (in the case of this study, teacher leadership). This study also made the assumption that Ford Park Schools is in the context of high school reform.

The Context of School Reform in this Study

This section outlines the context of the school division in which the study was conducted, Ford Park Schools, a large urban school division in Saskatchewan. Providing a context of the school division in this study will help other educators to distinguish whether their own context is similar. In addition, providing a context reveals the need for a literature review of high school reform initiatives.

Ford Park Schools was chosen for this study because they were in the midst of a high school reform initiative that relied on teacher leadership to engage teachers and students in teaching and learning. This reform initiative was inspired by a review of secondary collegiates
in 1999. The process of the review, exposure to current research, and a review by an external agency, resulted in deep discussions about learning in this particular division’s collegiates. These discussions illuminated the need for change in high schools. Through the work of several committees and external consultants, the board of education for Ford Park Schools made the reform initiative a three year division-wide priority, allocating substantial resources to the initiative and striking a strategic committee to guide the priority. A description of the central components of the reform follows.

To begin, Ford Park Schools identified a priority and developed a vision. The work in the division was carried out with the vision in mind and was focused on achieving the vision of the initiative. The Ford Park Schools reform initiative relied on professionalism rather than prescription. Through professionalism, the initiative was not a rigid, directive, linear process; instead, the voices of students, parents, teachers, administrators, and teacher leaders shaped the initiative within each of the high schools.

Instead of focusing on hierarchies with the administrator as the lone leader, the reform efforts of Ford Park Schools focused on collaboration and there were developed networks of teacher leaders, learning coordinators, and teachers across subject areas. When the initiative became a priority, formal teacher leader positions were created in all of the high schools. The role of these teacher leaders was fluid in responding to the needs of their individual school and community. In their formal role all teacher leaders shared the following responsibilities: (a) modeling effective teaching and learning; (b) giving the initiative direction; (c) collaborating with colleagues; (d) coordinating, collecting, and reporting data to measure efforts; and (e) developing strategic plans at the school and central level. The teacher leader was an integral part of the distributed leadership network, acting as a role model and providing support to colleagues.
Ford Park Schools provided continuous professional development in learning and assessment models for the following cohorts: (a) teacher leaders, (b) English language arts teachers, (c) mathematics teachers, and (d) learning coordinators. To support teacher leaders, Ford Park Schools provided release time, extensive professional development opportunities, and collaboration opportunities with other teacher leaders. The formal teacher leaders met regularly as a group at a central location for professional development opportunities, decision making, and planning.

In Ford Park Schools, data were used to aid in decision making and measure progress. The data collected included attendance figures, achievement results, observations, conversations, samples of student work, and surveys of the perceptions and thoughts of students, parents and educators. Teachers were involved in collecting the data in their classrooms, and the collaborative networks use the information in planning and decision making. As well, the results of the reforms were made public on the school division website, and were shared formally with the board of trustees.

The teacher leaders of Ford Park Schools were working within a high school reform initiative. It was essential to examine the literature related to high school reform in order to understand the context for the experiences of the teacher leaders.

**Positionality**

The study of teacher leadership called to me because issues of teacher leadership have been prominent in my educational career. As a student in high school, I saw teacher leaders as holding great influence in the collegiate I attended. In fact, it seemed to me they, at times, had more impact than did the administrators. In my opinion, these teacher leaders guided policy and programming at the school level. Other teachers looked to them for approval and advice. Then,
as a beginning teacher, I worked with an informal teacher leader who was a tremendous mentor for me. Although this teacher did not have formal authority, she had the capacity to sway decisions, particularly over issues that mattered deeply to her.

With the arrival of formal teacher leader roles in my school division, I had the opportunity to become an official teacher leader, and live the experience. The essence of what it means to be a teacher leader is close to my heart and personal. I believe in the power of distributed leadership, because as a student and as a beginning teacher, I witnessed the effect informal distributed leadership can have on a school. I believe that a formal role for teacher leaders that is supported at the school and division level is a compelling way to influence change.

In my role as a formal teacher leader, I reveled in the opportunity to learn, grow, plan and collaborate. However, I also felt that there were some tensions that the formal role of teacher leader seemed to have created. Because the idea of teacher leadership was so new in our division, teacher leaders were unsure of their role; other challenges included changes in relationships with colleagues and administrators. The work of high school reform and being a teacher leader was challenging, but it was also very rewarding. I felt empowered, and when I reflect on the work I did in that year, it was that empowerment that enabled me to be what I thought was successful.

I lived as a teacher leader in a professional capacity, but I also was impacted by teacher leadership in my personal life. My husband is also a formal teacher leader - this additional connection has resulted in even more thinking and conversation around the topic of teacher leadership. With a decision to add to our family, I was on leave from my role as a teacher leader in the second year of the initiative. Instead of living as a teacher leader, I was observing the experiences of my husband, and witnessed the cycle of excitement, frustration, determination, and planning that I remembered from my own experience. During this time away from work, I
had the opportunity to reflect on my experiences, and have conversations with teacher leaders. The conversations were intriguing, and although we all “lived” in very different high schools and were surrounded by different communities and colleagues, it seemed to me there were commonalities in our experiences. I wanted to know more about teacher leadership, and how it was best supported and encouraged. I wanted to know about the difficulties associated with the role, and how successes were achieved.

The context of high school reform is central in this study. In my opinion, the context of high school reform nurtures teacher leadership. In my experience, reform initiatives made educators uncomfortable and apprehensive at times, but this discomfort was a precursor to change, because it forced teachers to examine and reflect on their practices in the classroom. As a teacher leader, I witnessed conversations in staff rooms changing. Where it may have been the norm to talk about all of the barriers preventing learning in the past, with the reforms taking place teachers were exploring how they could best differentiate their instruction, support the student, and be flexible. To me, this was refreshing and essential. I believe that if educators can approach teaching by asking how they can move a student forward instead of lamenting student abilities and motivation, this positive, hopeful energy will help move reforms forward.

During my program of studies, the research I encountered led me to believe that teacher leadership was an integral aspect of school reform – I wanted to know how teacher leaders experienced their role in this reform. I wanted to grasp the meaning of teacher leadership so that I could live my life as a leader in education more fully and more aware. As well, I believed that uncovering teacher leaders’ experiences would result in opportunities for greater understanding, informed decision making from a system perspective with regards to support, and implications for further research.
Organization of the Thesis

This thesis is organized into five chapters. Chapter 1 outlines the background of the study, identifying the overarching problem, and the context for this study. Chapter 2 contains the literature review, which will explore high school reform, the possible role that distributed leadership has within high school reform, and the nature of teacher leadership. Chapter 3 describes the research design and the methodology for conducting the research. Chapter 4 consists of an integration of the research findings, a description of the experiences of the teacher leader participants, and gives a composite summary of the essence of what it means to be a teacher leader and how teacher leaders make sense of their experiences. Chapter 5 comprises the discussion and analysis of the research findings in relation to the research questions.
CHAPTER 2

REVIEW OF RELATED LITERATURE

This research is focused on an exploration of the experiences of formal teacher leaders in the context of high schools attempting reforms. Prior to understanding the experiences of teacher leaders, a review of the literature on school reform, distributed leadership, and teacher leaders was needed. The first section of the literature review presents the underlying contextualization for school reform, challenges and tensions in school reform, and a description of what makes school reform initiatives successful. The second section is a review of current research regarding the impact of distributed leadership. The third section is an examination of the nature of teacher leadership in the context of the literature.

The Nature of School Reform Initiatives

In this study, the experiences of the teacher leader participants were examined in the context of a high school reform initiative. This context necessitated an understanding of the nature of school reform, and a familiarity with the perspectives of prominent researchers on the topic. For the purposes of this study, a review of the rationale for school reform initiatives is presented. As well, the tensions in school reform and specific examples of school reform are discussed. This section closes with an examination of how to sustain reform, and six drivers in effective school reforms are presented.

Fullan (2009) stated that the ultimate goal of system reform is to improve society by developing more “literate and numerate citizens” (p. 290) who contribute to the community socially and economically. Fullan found that improving education by means of reform results in increased public confidence in the education system, which is perhaps another reason for
attempting reform. Fullan determined that in reform initiatives, transparency is important, and evidence that change is taking place should be communicated to the community and to parents. This suggests that if school reform initiatives are to be supported communities will want to see evidence of change, and if these initiatives are to be effective, educators will need to see evidence that their work is making a difference. It is appropriate that the literature has been replete with research on the topic of school reform considering all that reform promises for schools, students, and society. Fullan and other researchers (Elmore, 2000; Hargreaves & Fink, 2006; Hopkins, 2007; Reeves, 2008; Sharratt & Fullan, 2006) have discussed the nature of reform, and have addressed a number of issues within school reform.

The Rationale for School Reform Initiatives

A number of researchers (Cuban, Kirkpatrick & Peck, 2001; Daniels, Bizar & Zemelman, 2001; Elmore, 2000; Fullan, 2009; Reeves, 2008) presented justification for school reform initiatives by identifying what is not working in school systems: Deficient practices that are protected by bureaucracy, unrealized student achievement, and a resistance to let go of traditional structures. Elmore (2000) determined that large scale reform would address the myriad of problems that he argued exist in public schooling: a bureaucratic system of administration, a lack of teacher professionalism, loosely coupled systems that protect poor practices, and schools that are too large. Elmore’s position is uncomplimentary and may be distressing to educators, but it is legitimate and based on research. Sometimes, the bureaucracy of teacher federations and the tradition of principal protecting teachers have left schools or school systems with teachers who have forgotten why they entered the profession (Elmore, 2000). Like Elmore, Darling-Hammond (2009) determined that the organizational bureaucracy of traditional schools is one of the reasons reform is needed: “In the bureaucratic concept of
teaching, teachers do not need to be highly knowledgeable about learning, teaching, or curriculum, because they do not, presumably, make the major decisions about these matters” (p. 47). Darling-Hammond’s work implies that bureaucracy has led to a lack of teacher professionalism.

Unrealized student achievement is a second justification for reform initiatives articulated by researchers. The literature on school reform initiatives reveals that the conditions for learning are not always optimal in schools. For example, The National Research Council Institute of Medicine of the National Academies (2004) cited deplorable conditions in urban high schools, particularly those that serve less affluent students, identifying that these conditions make it difficult for learning to take place, and in order to repair these inequities, school reform is needed. These conditions may have come about as a result of educators believing that demographic characteristics reduce the impact of professional teaching practices to nothing (Reeves, 2008). In a study of 330 schools, Reeves found that students scored an average of 21.2 percent lower on a set of 25 assignments when the educators surveyed in the schools attributed student achievement mostly to demographics (43.6 percent) as opposed to attributing student achievement mostly to teaching practices (64.8 percent). Reeves’s work resulted in this finding: “When we expect that we have an impact on student achievement, we are right. When we expect that we are impotent, we are also right” (p. 7). When teachers do not have faith in their students, students do not have faith in themselves. If these conditions exist, it appears that reform is necessary to ensure that educators have hope for their students, and faith that their students can achieve.

A third rationale for school reform initiatives is the traditional structure and organization of high schools (Cuban, Kirkpatrick & Peck, 2001; Daniels, Bizar, & Zemelmen, 2001). The traditional organization of a high school with its regimented schedule and lack of connection
with students does not facilitate authentic engagement and learning. Daniels, Bizar, and Zemelman (2001) found that high school often exacerbates youth:

Young people who are yearning for connection are silenced and marched through compulsory exercises, programmed into endless, disconnected days of involuntary activities, and overseen by adults who cannot know them and do not have the opportunity to care (p. 21).

This suggests that the bureaucracy and tradition of high schools with their inflexible schedules and customary rites of passage have resulted in a boring, non-engaging experience for high school students. Reforming these types of traditional high school structures has been difficult (Hopkins, 2007; Daniels, Bizar, & Zemelman, 2001). Cuban, Kirkpatrick, and Peck (2001) stated that “historical legacies of high schools in their school structures…will trump the slow revolution in teaching practices” (p. 830), suggesting that although the problems with the traditional structure of high schools dictate that reform is needed, the traditional structure also makes reform difficult. The traditional high school and the way high school is organized appear to have remained relatively constant in most cases, and in order to make high schools more engaging and authentic, reform is necessary.

**Key Challenges and Tensions in School Reform Initiatives**

The understanding of school reform initiatives appears to be a sensitive subject matter among educators, and several major challenges of their implementation have been identified in the literature (Cuban, 2000; Fullan, 2009; Hargreaves & Fink, 2006; Hopkins, 2007, & Reeves, 2009). From their research, Hargreaves and Fink (2006) found “change in education is easy to propose, hard to implement, and extraordinarily difficult to sustain” (p. 1). Echoing these findings, Fullan (2009) found bureaucracy prevents system reform, because “bureaucratic
distracters take [educators] away from the core business of teaching and learning” (p. 287). Bureaucracy preventing reforms may hold especially true for teacher leaders. Often, teacher leaders are asked or volunteer to serve on committees, attend meetings, give presentations, and participate in professional development (Little, 1995; Margolis, 2008; Reeves, 2008). In navigating the organizational hierarchy, in-school leaders are removed from their classroom, and have less time to spend on teaching. An additional challenge to implementing change identified by Schleicher (2008) is that school systems operate as silos, with new reform ideas being added every few years or so (with layers of other unfinished reforms below). In this pattern, reforms are not given enough time to be completed. In addition, educators may become cynical about new reforms, anticipating that they will be discarded in a few years in favour of something new.

A number of researchers have found that change in schools is difficult (Cuban, 2000; Heifetz & Linsky, 2002) and implementing changes in schools is even more difficult if there is a lack of effective leadership (Reeves, 2009). Reeves (2009) found “effective organizational change remains elusive because too many leaders substitute labels for substance” (p. 237); changing the name of a program or a position does not make it better if work is not done to change the foundations of the program, or the role of the person. Reeves acknowledged that the power of resistance to change makes system reform difficult, but determined “leadership makes a difference” (p. 243). This suggests that if effective leadership is in place throughout the organization the resistance to change will be less powerful. However, Cuban (2000) found that “teachers resist innovations that will change their daily routine or threaten their jobs” (p. 124). This resistance to change suggests that school reform is difficult. Heifetz and Linsky (2002) warned that “the deeper the change and the greater the amount of new learning required, the more resistance there will be and, thus, the greater the danger to those who lead” (p. 14). If a
traditional leadership model is utilized, there is one leader at the top of the hierarchy who will experience this resistance. This suggests that if distributed leadership is in place, there will be less resistance to change, and more leaders to buffer the resistance that remains.

Administrators must be cognisant of the changes reform initiatives mean for teachers and students and must acknowledge the complexity of these changes. Heifetz and Linsky (2002) found that change can be categorized in two ways: As technical change, which can be made by top decision makers with the resources that already exist in the organization, and as adaptive change, which needs everyone in the organization to be involved in the change and learn new ways of doing things. Heifetz and Linsky found that sometimes leaders try to avoid conflict by approaching problems as if they can be fixed with technical change when in fact, adaptive changes are necessary. Adaptive change is the type of change required in school reform initiatives; however, adaptive changes can be difficult, as they challenge educators to examine their beliefs and biases about teaching and learning. Heifetz and Linsky stated “this why we see so much more routine management than leadership in our society” (p. 15), suggesting that technical change is much easier than adaptive change. Hopkins (2007) agreed, stating, “resolving technical problems is a management issue; tackling adaptive challenge however requires leadership” (p, 17). Hopkins found that it is the work of educational leaders to stimulate people to make adaptive changes, working through the discomfort of change with all stakeholders.

**Toward Sustainable School Reform**

Within the literature on school reform, the theme of sustainability is receiving increasing attention. In presenting the need for sustainable school reform initiatives, Hargreaves and Fink (2006) noted that the 1990’s reform effort focusing on standards was inherently unsustainable.
Although the movement began with intentions of improving achievement, it led to tight control of teachers, control of curriculum, and quick, technical fixes (Hargreaves & Fink). Instead of basing school reform on standardization and individual leaders, Hargreaves and Fink found there is a need for sustainable improvement in schools, focused on community and distributed leadership.

In view of the tensions that exist in school reform initiatives, an essential aspect of school reform is considering how to keep reform initiatives going. Hargreaves and Fink (2006) presented seven principles of sustainability in educational change: (a) depth (preserving the moral purpose of education, meaningful learning); (b) length (leadership is beyond the individual, and lasts); (c) breadth (leadership is distributed, and it spreads); (d) justice (change does not harm any part of the community); (e) diversity (variety in teaching and learning is celebrated); (f) resourcefulness (in all change people are taken care of, and their energy is renewed), and g) conservation (learning from the past in planning for the future). Hargreaves and Fink emphasized that in approaching change the seven principles are interdependent, and that all principles must be incorporated into a plan for change if it is to be sustainable. For school reform initiatives to be effective, several features need to be present.

**Six Drivers of Effective School Reforms**

Researchers in the area of school reform have identified a number of features that are commonly found in effective reform initiatives. In his research on a specific reform initiative in England, Hopkins (2007) used the word *drivers* when describing these levers for reform – his term is borrowed here. Six drivers have emerged from this examination of the literature on school reform. These drivers include constructing a powerful vision, utilizing interjurisdictional comparisons, conceptualizing instructional leadership as a change agent, employing a distributed
leadership model, developing empowered professional teachers, and providing compelling professional development. A description of each driver of effective school reform follows.

**Constructing a powerful vision.** The purpose of reform, which is Hargreaves and Fink’s (2006) principle of depth, should be clearly articulated. All stakeholders should see the need for change, and believe in the goals of the reform. Similarly, there is a need for “continuous communication of a clearly articulated vision” (Sharratt & Fullan, 2006, p. 3). This implies communicating the vision to all stakeholders in education, including educators, students, parents, and the general public. An inspirational vision for reform explains the purpose of the reform, the nature of the reform and the rationale for the reform (Fullan, 2009). If all stakeholders are made aware of the need for reform, and know the direction the reform is taking, change will be easier.

From his investigation, Fullan (2009) found that the development of a few “ambitious goals publicly stated” (p. 278) makes the general public aware of the problem, and the need for reform. If the public supports the reform initiative, there may be more pressure on policy makers to allow the reform to be successful (for example, the public may lobby school boards to change policies on schedules, or they may lobby for changes in building design). In addition, Fullan suggested that the people doing the work (teachers and students) must be engaged in the process and must believe in the vision if it is to be effective. Clearly communicating the vision, how it will be carried out, and why it is necessary will help to gain the cooperation and dedication of teachers and learners.

**Utilizing interjurisdictional comparisons.** The use of international, national, provincial, and local tests for comparing countries, provinces, school divisions, and individual schools has
been found to be a driver for school reform (Hopkins, 2007; Schleicher, 2008). This has been a contentious issue in educational reform as many educators and teachers’ professional organizations argue that these tests are irrelevant. Riffert (2005) found a number of problems with the use of standardized tests, including teaching to the test to improve scores, limited flexibility in teaching, and decreased student engagement. This suggests that if teachers and students are unduly focused on achieving high scores on standardized tests, there will be a lack of creativity and innovation in the classroom.

Despite the drawbacks of using standardized testing to compare jurisdictions, Schleicher (2008) determined that international benchmarking can show teachers what is possible in education, and also can support calls for educational change. Schleicher found that international comparisons are useful in initiating school reforms when they are shared with the public to persuade them of the need for reform. If there is a purpose in making the comparison, and the comparison is made thoughtfully, it can reveal strengths and needs in school systems. As well, tests that are conducted at regularly scheduled intervals can be used to determine whether or not a reform initiative is improving student achievement over time. Standardized testing is prevalent and it can be useful (Riffert, 2005). However, as illustrated in the previous paragraph, such testing can have an unfortunate effect on classroom practices, and this means that standardized tests should be used with caution.

**Conceptualizing instructional leadership as a change agent.** Some school systems have traditionally sought administrators who are heroic leaders, using charisma to initiate change (Hargreaves & Fink, 2006; Lambert, 2003). However, to drive reform initiatives, school systems need administrators who operate as instructional leaders (Hopkins, 2007). In their review of the research on educational administration, Heck and Hallinger (2005) found that many scholars in
the field of educational administration are shifting from a focus on administrator as manager to the role of administrator as instructional leader. Administrators need both skill sets, but instructional leadership is necessary to initiate change (Hopkins, 2007). Since change is the crux of school reform initiatives, effective instructional leadership is imperative.

Leithwood, Harris, and Hopkins (2008) found that effective leadership positively influences student learning, as a strong leader “serves as a catalyst for unleashing the potential capacities that already exist in the organisation” (p. 29). In addition, Leithwood et al. found that instructional leaders understand the talents of their teaching staff and use these talents to build capacity in the organization, resulting in greater school improvement and student learning. Leithwood et al. emphasized that instructional leadership means understanding the importance of shared vision, developing people, and “redesigning the organisation” (p. 30). All of these qualities are paramount in the success of school reform. The driver of instructional leadership is important because it impacts other drivers of school reform, such as utilizing distributed leadership, and developing empowered professional teachers. Instructional leadership is a precursor for these drivers.

**Employing a distributed leadership model.** A reform initiative appears to need multiple leaders to be effective, rather than one leader responsible for the initiative. In the traditional sense of leadership, heroic leadership of one individual was responsible for developing a vision and spreading this message throughout the organization (Lambert, 2003; Reeves, 2009). Reeves identified that this type of “charismatic leader is not only ineffective, but also counterproductive” and that “[i]deas persist and spread because the ideas have value, not because an authority figure gave a speech” (p. 244). Instead of focusing on this heroic leader, Reeves found it was more effective to shift from hierarchy to network, where all are responsible
for leading. This idea of a network of leaders fits well with the concept of distributed leadership, as the strengths of all leaders in the organization are utilized. The research of Hargreaves and Fink (2006) agrees with moving away from a traditional leadership model and towards a plan for leadership succession. Educators must “set aside [their] yearning for heroic and everlasting leadership and...treat leadership instead as something that stretches far beyond any one leader’s professional and even physical lifetime” (p. 93). Similarly, Lambert (2003) found that “if only we can find the right qualities and characteristics of the Leader [sic], we will have found the answer to the problems of leadership” (p. 423). The implication is that the traditional leadership model with a heroic leader at the top of the organization is not sustainable. Instead of looking for heroic leaders to control organizations, school systems should work at developing leadership capacity within the organization, and designing a leadership succession plan.

Distributing leadership is an effective strategy for developing leadership capacity (Elmore, 2000), and an important driver in effective reform initiatives. Elmore (2000) found that a positive aspect of distributed leadership is capitalizing on different expertise that exists in an organization. Echoing this, Schleicher (2008) found that current education systems would be more effective than traditional systems “if they could integrate and build on the human potential that lies in their global workforce” (p. 99). If a traditional leadership model is utilized in a school system, the potential in the teaching staff is not being made use of because the organization is being guided by the knowledge of one person, the heroic leader. If leadership is distributed to teachers and other staff within schools, there are more people acting as role models, there is a feeling of empowerment and purpose, and there is a multitude of creative minds to plan and make decisions. Distributed leadership empowers other leaders in the organization, keeps people informed of the vision for the initiative, and brings voices from different settings to
planning and decision making. Distributed leadership often operationalizes as teacher leadership, which will be examined in a deeper context in the next section of this literature review, as it is especially relevant for this study.

**Developing empowered professional teachers.** The literature suggests that teachers have a crucial role in school reform initiatives. However, some researchers have suggested that teachers’ involvement in school reform initiatives is limited because of a lack of teacher professionalism (Darling-Hammond, 2009; Elmore, 2000). From his research, Elmore (2000) found that teacher professionalism is insufficient; meaning that some teachers are using inferior practices and student learning is suffering. In addition, Elmore found that protection of marginal teachers by bureaucracy is an inhibitor for successful reforms. Similarly, Darling-Hammond (2009) found that a strategy for school reform is most effective in the context of professionally-supported democratic schools. Darling-Hammond’s work revealed that when decision-making is removed from teachers, accountability is difficult to achieve. If teachers are unable to make decisions about their practice, an aspect of their professionalism is taken from them. The implication then is that for a reform initiative to be successful there should be increased teacher professionalism, and teacher involvement in implementing the reform initiative.

Instead of focusing on reform from a top-down approach, Darling-Hammond (2009) found that there needs to be an “investment in teachers’ knowledge and expertise” (p. 55). According to Darling-Hammond, “every aspect of school reform – the creation of more challenging curriculum, the use of more thoughtful assessments, the implementation of decentralized management, the invention of new model schools and programs – depends on highly skilled teachers, working in tandem with families” (p. 63). In effective school reforms,
teachers are partners, and are involved in all of the aspects of school reform. To support them, professional development is essential.

**Providing compelling professional development.** The continuing professional development of teachers has been identified by researchers as an important driver in large scale system reform (Hopkins, 2007). Further revealing the need for professional development, Darling-Hammond (2009) cited evidence that investing in teacher professional development makes a difference in student learning. Because improved student achievement is one of the primary goals of school reform, professional development is important so that teachers are utilizing best teaching practices and impacting student learning. However, this investment in professional development must be carefully planned and focused, or it may be ineffective.

Simply offering professional development does not ensure it will be effective. Both Hopkins (2007) and Darling-Hammond (2009) found that most systems’ professional development is not effective because it is rarely continuous, and is often not relevant for what is currently happening in teachers’ classrooms. To make professional development more effective, Hopkins (2007) suggested that professional development should be focused on using data to inform decision making. This may mean learning a new instructional strategy, implementing it, and measuring student achievement to determine if it is effective. It may also mean surveying students and teachers about learning and assessment models.

Determining the theme for professional development is also critical in implementing school reform initiatives. Elmore (2000) stated that professional development should focus on improved instruction in core areas, beginning with literacy and mathematics. This means deliberately designed continuous professional development for all teachers in best teaching practices. Hopkins (2007) found personalizing learning was an important driver in system
reform. This means recognizing that all students have different needs, and need flexible ways of learning, it means focusing on teaching metacognitive skills, and it means using assessment for learning practices. Black and Wiliam (1998) found a need for a shift to formative assessment to raise standards. Formative assessment and assessment for learning practices make a difference in student achievement (Black & Wiliam, 1998; Hopkins, 2007), and including these practices in professional development for teachers may result in students who are engaged in their own learning.

Within the professional development of teachers, devoting time for teachers to collaborate and assess student work, and plan for improvement is important (Hopkins, 2007; Reeves, 2005). In Hopkins’ view, professional development of teachers should focus on developing a common language, which teachers could use to discuss teaching, and their students’ learning. If teachers have a common language about teaching and learning, their professionalism may also increase as they are able to communicate with colleagues about their practices, resulting in teachers feeling empowered and effective. This increased communication will encourage collaboration (Reeves, 2005) and give teachers the vernacular to plan improvements to their practice more effectively.

Through their research, Marzano, Pickering, and Pollock (2001) recognized a number of instructional strategies that improve student achievement. These research based strategies include identifying similarities and differences, summarizing and note taking, reinforcing effort and providing recognition, offering homework and practice, using non-linguistic representations in instruction, cooperative learning, setting objectives and providing feedback, generating and testing hypotheses, and providing cues, questions, and advance organizers as a part of instruction. (Marzano et al.). Teachers need to have more tools so that they can successfully reach all of
their students, promoting engagement. The key is to use a variety of strategies to meet the needs of all learners and to keep the learning fresh and authentic (Hopkins, 2007; Marzano et al., 2001). In the context of system reform, a number of these powerful strategies should be the focus of professional development. As Hopkins (2007) has found, professional development can build the common language of teachers so that they can name the learning approaches they are using, and share them with colleagues.

School reform is an extensive topic, and is covered widely in educational literature. For the purposes of this study, one driver of school reform, distributed leadership is examined in greater detail. The next section gives an overview of selected literature around distributed leadership.

**Representations of Distributed Leadership**

Teacher leadership is a manifestation of distributed leadership. Consequently, the literature around distributed leadership was very important to this study. In their collection of research on distributed leadership, the editors, Leithwood, Mascall, and Strauss (2009) noted that distributed leadership has become fashionable in school improvement, and that prior to implementing a distributed leadership framework, research needs to be consulted to see in what contexts distributed leadership is most beneficial, what the outcomes of distributed leadership are, and why distributed leadership is effective. It is not enough for schools to simply adopt a distributed approach; therefore, the research must first be consulted. As this section illustrates, distributed leadership can take a number of forms (Hargreaves & Fink, 2006; MacBeath, 2009) and can be inhibited or facilitated by a number of factors (Firestone & Martinez, 2007; Leithwood et al., 2007). This section looks at the how distributed leadership differs from traditional school leadership, the processes of effective distributed leadership, different forms of
Distributed leadership, the facilitators of distributed leadership, and how distributed leadership might be sustained.

Distributed leadership is observable in two forms: additive and holistic (Gronn, 2003). The additive form is an “uncoordinated pattern of leadership” (Leithwood et al., 2007, p. 39) where many people in the organization engage in leading, but there are no set roles, and no accounting of who is doing what. The second form, holistic distributed leadership, includes “consciously managed and synergistic relationships among some, many, or all sources of leadership in the organization” (p. 39). In an organization utilizing a holistic distributed leadership framework, all leaders in the organization will be dependent on one another, making social skills and communication skills an important aspect of leadership.

It is useful to further define the holistic form of distributed leadership. Leithwood et al. (2007) delineated the holistic form of distributed leadership into four types: (a) planful alignment, (b) spontaneous alignment, (c) spontaneous misalignment, and (d) anarchic misalignment. The first two types are positive alignments. However, as the names imply, they are configured differently. Planful alignment is carefully thought out by organizational leaders, and then formal leadership roles are distributed throughout the organization. In this type of alignment, superintendents might break leadership tasks into clearly defined roles, and then fill these roles with administrators and teachers. In contrast, a spontaneous alignment is unplanned and leaders act by instinct, implicitly knowing what their actions should be. Spontaneous alignment might occur in reaction to a natural disaster occurring at the school. Staff, regardless of their role, would act as leaders to direct children, coordinate relief, and communicate with parents.
The third type of distributed leadership, spontaneous misalignment, is similar to spontaneous alignment in the way the leadership is distributed. However, in this type of distributed leadership arrangement the outcome is the difference and the misalignment is revealed in decreased organizational productivity (Leithwood et al.). Spontaneous misalignment might also occur in response to a natural disaster. However, a spontaneous misalignment would occur if staff acted in a way that was detrimental to the organization, like removing students to an off-site location that although safe, parents and top school administrators were unaware of the decision.

The fourth form of holistic distributed leadership is anarchic misalignment. In this pattern, some organizational leaders influence others to behave in a competitive manner with other units of the organization. In this environment, parts of the organization operate in isolation, according to their own vision and goals (Leithwood et al.). Anarchic misalignment might occur in response to a new curricular or extra-curricular program being offered that a group of teachers does not support. In response to the initiation of the program, one teacher may arise as a leader and attempt to sabotage it by offering a different program. Although these four types of holistic distributed leadership are consciously produced in organizations, they can align or misalign organizations. The implication is that distributed leadership must be carefully and thoughtfully implemented and monitored.

Moving Away from Traditional School Leadership Models

As mentioned in the section on school reform, in many reform initiatives there is a movement away from heroic leadership. The literature on educational leadership is replete with research on in-school administrators, which reinforces the “assumption that school leadership is synonymous with the principal” (p. 96), and ignores other forms of school leadership.
(Hargreaves & Fink, 2006). Suggesting that there is more to school leadership, Spillane, Halverson, and Diamond (2001) stated:

Leadership practice is not simply a function of an individual leader’s ability, skill, charisma, and cognition. While individual leaders and their attributions do matter in constituting leadership practice, they are not all that matters. Other school leaders and followers also matter in that they help define leading practice (p. 27).

Leithwood et al. (2007) found that although the study of leadership in schools has been traditionally focused on heroic individuals, there have always been others in the organization providing leadership to complete tasks. Leithwood et al. noted that “more directive forms of leadership…‘are productive when the tasks to be performed are relatively simple’” (p. 46). Teaching and learning are very complex. In a traditional high school context, one principal as heroic leader cannot have all the knowledge required to effectively lead instruction.

A key finding from Leithwood et al.’s (2007) research on a large urban Ontario school division is that “some hierarchy is unavoidable and necessary in any large organization [and] for greatest impact some leadership functions need to be performed by those in particular positions or with special expertise, not just anyone in the organization” (p. 57). This implies that although leadership can be distributed, the organization cannot be completely flattened. There still must be those leaders at the top of the organization deciding on the vision, and monitoring the other leaders. Simply distributing the leadership does not ensure it will happen. Effective distributed leadership is dependent on principals’ ability to lead the other leaders (Leithwood et al., 2007). As with school reform, the principals’ instructional leadership seems to be a crucial linchpin in effective distributed leadership.
Although a shift to distributed leadership may seem to be the obvious answer to school reform initiatives, it is not easy to shift from the traditional leadership model for a few reasons. First, this is because teachers and principals may not be willing to change, because this requires them to admit that their current practices are somehow flawed. Festinger’s (1957) theory of cognitive dissonance effectively explains this resistance. Cognitive dissonance is an awareness of being psychologically uncomfortable because there is an inconsistency between what a person knows and what that a person does (Festinger). Festinger found that to avoid the feeling of cognitive dissonance, a “person will likely avoid situations and information which would likely increase the dissonance” (p. 3). To avoid experiencing cognitive dissonance in a school reform initiative, educators may avoid the knowledge of what distributed leadership could offer their organization and hold onto their belief in the power of their traditional leadership model.

In addition, Leithwood et al. (2007) found that teachers may view distributed leadership as infringing on their time with their students and some principals may be reluctant to give up their power. The traditional hierarchy of school leadership will not be rearranged only with the implementation of distributed responsibilities. It requires thoughtful planning, collaboration with leaders, and monitoring of the distributed leadership network. Distributed leadership does not necessarily mean less work for an administrative team. Instead, it can mean more work for the principal in coordinating others, building capacity for leadership in others, and overseeing the work of the non-administrative leaders in the distributed network (Leithwood et al., 2007). Work needs to be done with teachers and with administrators to ensure distributed leadership is viable, and that the maximum benefit from this type of leadership is gleaned. To facilitate this, an examination of processes involved in distributed leadership is necessary.
Processes of Distributed Leadership

Some writers (Spillane et al., 2001; Firestone & Martinez, 2007; Lieberman & Miller, 2001) have revealed that when distributed leadership is effective, there are certain processes in place. These processes include the appreciation of collective knowledge (Spillane et al., 2001) and the integration of efforts of leaders at different levels (Firestone & Martinez, 2007; Lieberman & Miller, 2004). In their research, Spillane et al. (2001) detailed several examples of distributed leadership in action, all of which illustrate that collective knowledge is used in enacting leadership practices. In the distributed leadership framework, leaders with “different areas of expertise and knowledge [were] interdependent in constituting the practice” (Spillane et al., p. 25); their actions could not be separated from one another. In effective distributed leadership the collective knowledge of all parties is greater than the knowledge of any one individual. Spillane et al. found that “school leadership is best understood as a distributed practice, stretched over the school’s social and situational contexts” (p. 23). This is reminiscent of Wertheimer’s (1944) Gestalt theory that the whole is different from the sum of its parts. Wertheimer’s theory contended that a group of people working together do not “constitute a mere-sum of independent Egos. Instead the common enterprise often becomes their mutual concern and each works as a meaningfully functioning part of the whole” (p. 8). That is, looking at each of the independent members of the group and then adding them together does not reveal the capabilities of the whole group. The implication of Spillane et al.’s (2001) work is that focusing on the leadership of one leader (the principal) is not the best way to approach school leadership. Instead, the leadership of all of the members of the group should be considered when devising an approach to school leadership.
Firestone and Martinez (2007) conducted case studies in four schools in three different school districts to determine the extent to which districts and teacher leaders can influence teaching practice. Their findings indicated that utilizing a distributed leadership framework can integrate teacher leaders into a district wide change effort and enhance district leadership. “Distributed leadership provides a way of thinking about how the work of school districts and teacher leaders may or may not complement each other” (p. 7). Specifically, Firestone and Martinez found that districts influenced teaching in the following ways: they monitored teaching through formal and informal supervision visits, they provided adequate materials and allotted adequate instructional time, they offered continuous professional development in the area of the division initiative, and they selected curricula and ensured that it was being implemented. Teacher leaders also influenced teaching by providing materials to teachers, by monitoring teachers directly and indirectly, and by helping teachers grow professionally through coaching.

The provision of materials was found to be useful, but it did not influence teaching practices as much as monitoring and coaching did. Although monitoring had the ability to change teaching, it was also a precarious practice. Firestone and Martinez (2007) indicated that “monitoring can be intrusive and, if done inappropriately, can undermine the trust teacher leaders need” (p. 19). To avoid this potential pitfall, teacher leaders who shared their knowledge “without positioning themselves as authorities, either in the sense of formal authority or more knowledgeable authority” (p. 22) were most successful. These teacher leaders were able to suggest different ways of doing things, without appearing disapproving. The most influential practice of teacher leaders was coaching, chosen by 24 out of 35 teachers in the study. A study conducted by Lambert (2003) also found that coaching was an effective way of leading. Although coaching was reported as influential, Firestone and Martinez (2007) found it was
executed differently in each of the schools in the study. But, regardless of the different coaching techniques, most teachers reported that teacher coaching influenced their teaching practices.

Some research has emphasized the significance of the central office leadership role and its juxtaposition of the role with teacher leaders. In their analysis of how district roles and teacher leader roles worked together, Firestone and Martinez (2007) identified that teacher leaders complemented district leadership efforts by participating in some of the same leadership tasks, reinforcing their importance, but in a different capacity. The district influenced these complementary roles by ensuring that teacher leaders received sufficient professional development, so that they could “become experts to whom teachers could turn and who would have knowledge to offer teachers” (p. 24). This professional development was offered at monthly day long meetings, and consisted of three themes: working with difficult teachers, learning about content and instruction, and issues related to testing (Firestone & Martinez). In addition to this, many teacher leaders attended workshops and conferences that assisted them in their role. In their study, the districts also tried to reinforce the importance of the teacher leader position with school administrators, implying that administrative support is an important aspect of making distributed leadership work. In a case study reported by Lieberman and Miller (2004), a teacher leader substantiates Firestone and Martinez’s (2007) research, stating:

Unless you have teacher leadership and strong administrative leadership, you don’t get to transformation. Teachers and administrators often get into “learned powerlessness,” especially when it comes to standards. When a new paradigm is introduced, the default is the known; the instinct is to recreate the second-grade classroom you experienced. It is up to both teacher and administrative leaders to create the conditions that push the conversation beyond blame and helplessness (Lieberman & Miller, 2004, p. 89).
This implies that both the administrator and the teacher leader must work together, and regardless of how valuable a leader is, they must be supported to be effectual. The research of Firestone and Martinez (2007) and Lieberman and Miller (2004) suggest that distributed leadership requires leaders at all levels (teachers, in-school administrators, and district leaders) to combine their efforts.

**Forms of Distributed Leadership**

A review of the literature reveals that there are a number of different forms of distributed leadership, and that leadership is distributed differently, depending on the context (Hargreaves & Fink, 2006; MacBeath, 2009). Gronn (2009) found that distributed leadership looks different in different contexts and that it is adaptive to the situation. He warned that school leaders should not just set up formal distributed leadership and expect success. Gronn encouraged scholars to continue the debate on distributed leadership, and not simply accept it as the only answer to school improvement. Similarly, schools and educators, as the consumers of this academic debate, should carefully consider what pattern of distributed leadership they want in their schools.

Based on their extensive research in the field of distributed leadership, Hargreaves and Fink (2006) developed a continuum of distributive leadership using the metaphor of a thermometer, to facilitate understanding the range of distributed leadership that might exist in a school. In their discussion of each type of distributed leadership, Hargreaves and Fink gave a case study example from their research, and then revealed the characteristics of that type of distributed leadership by discussing the case. In addition, they listed strategies for entering into each form of distributed leadership for top leaders. For the purposes of this study, their discussion is summarized into concise descriptions.
At the bottom of the thermometer, autocratic leadership is tightly controlled by administrators. Hargreaves and Fink (2006) found that those who tried to emerge as leaders or deviate from the plans of the administrators were suppressed. However, this paradoxically resulted in increased desire to take on leadership, and created interference with the plans of the administrators. An autocratic approach may be required in situations of incompetency to increase professionalism, but an autocratic approach generally does not sustain change (Hargreaves & Fink, 2006).

Moving up the thermometer, traditional delegation mirrors the traditional view of a heroic leader that was discussed in the prior section. In this form, distribution is viewed as delegation, often to department heads. Traditional delegation “maintains stability and continuity” (p. 116) but traditional delegation does not result in school wide change. Hargreaves and Fink (2006) found that in this situation, some staff felt ignored or were unaware of what was happening in the school. Hargreaves and Fink recommended that administrators who want to move into traditional delegation focus on giving some of their power to a few people on staff that they trust, remembering that they cannot control everything by themselves.

A progressive delegation builds upon a traditional delegation as administrators take advantage of the strengths of the people within the organization to distribute leadership more widely. In this situation, there are more opportunities for staff to become involved in initiatives that are viewed as important by administration. In the research of Hargreaves and Fink (2006), the disadvantage of this pattern of distributed leadership was that when the formal leaders left, the new leadership sometimes did not have the same philosophy of leadership, and the staff became frustrated. Hargreaves and Fink found that moving down the thermometer from progressive delegation to traditional delegation may cause increased frustration because staff
who had experienced a progressive delegation would expect to have some involvement, and that would be removed in a traditional delegation. This reveals that there are challenges in shifting to a different form of distributed leadership. Conversely, if schools are attempting to move up the thermometer into a model of progressive delegation they should develop new leadership roles focused on improved learning, and then be sure to monitor their progress (Hargreaves & Fink).

In the middle of the thermometer, an organization with guided distribution has leadership extended across the organization. The leadership is extended in a skillful way, designed to encourage collaboration and develop professional learning communities. However, a negative aspect is that guided distribution is very dependent on a senior administrator’s ability to facilitate the distribution of leadership. In the cases studied by Hargreaves and Fink (2006), change was only sustainable for as long as the dynamic leader was there. To move into this stage of distributed leadership, administrators need to focus on improving the quality of the relationships that they have with staff members, modeling professional dialogue and guiding conversation towards improving the school.

In contrast to guided distribution, emergent distribution emanates from those “who seize the initiative to inspire and influence their colleagues” (Hargreaves & Fink, 2006, p. 122) regardless of the vision of the top leader(s). In Hargreaves and Fink’s case studies, emergent leadership was not instigated by senior leaders, although a purposeful, optimistic school culture did influence whether or not leaders would emerge. To move into this stage of distributed leadership, administrators should show trust in their staff by allowing innovative ideas to flourish, and they should celebrate the initiative of staff members.

Assertive distribution of leadership, almost at the top of the thermometer, means that all members of the organization feel empowered to challenge the top leaders in the organization, as
long as their leadership strengthens the overarching goal of improved learning. This type of leadership is often steeped in politics like challenging the social treatment of marginalized groups or contesting bureaucratic policies. To move into this form of distributed leadership, administrators need to welcome different perspectives into the discussion, being aware that they may be challenged personally. Under this form of distributed leadership, it is important to make sure that discussions are centered on the shared goals and vision of the school. If focus deviates too far it is the administrator’s responsibility to remind everyone of these goals.

The warmest point on the thermometer, and perhaps the most problematic, is anarchic distribution. In this pattern of distribution, “senior leaders who are never present, who can’t maintain clarity of unity of purpose, who are weak or afraid, or who want only to be liked—all create a leadership vacuum that others are more than eager to fill” (Hargreaves & Fink, 2006, p. 135). This leadership, although emergent, is usually disruptive to the organization, and sometimes self-serving because there is a lack of direction and moral values from the top leader. Hargreaves and Fink did not find a situation where anarchy was productive, so schools should avoid this form of distributed leadership by making sure top leaders do not abdicate their responsibilities.

Hargreaves and Fink (2006) noted that each pattern of distribution has positive and negative aspects, and should be utilized thoughtfully, with a great deal of consideration given to context. Leaders need to consider where their school is on the thermometer before implementing a new system. Hargreaves and Fink’s continuum of distributive leadership will be useful in gauging what form of distributed leadership exists in a school context and how a school might move to a different form of distributed leadership.
Other researchers have also considered the different patterns of distributed leadership. MacBeath (2009) conducted a study in England that used questionnaires, interviews, and observations to explore the nature of distributed leadership and the different forms it may take. Drawing on the above three sources of data, MacBeath and his research team facilitated workshops that resulted in the conception of six ways of distributing leadership: formally, pragmatically, strategically, incrementally, opportunistically, and culturally.

In MacBeath’s study, leadership was distributed formally by principals through official roles with designated responsibilities. In some cases, this formal structure existed before the principal arrived, and was simply maintained, and in other cases the principal restructured roles and responsibilities. MacBeath found that formal distribution was advantageous because those in a formal role felt confident, other staff knew where they fit in the organization, and parents knew who was responsible when they had questions or concerns.

In contrast to formal distribution of leadership, distribution pragmatically was “characterized by its ad hoc quality” and was “often a reaction to external events” (MacBeath, 2009, p. 47). When leadership was distributed in this way, it was usually done so in response to pressure from the community or the government. The notion of pragmatic distribution means that the principal chose to distribute leadership to those people who could be trusted to complete the task, those that already had the capacity to lead. MacBeath found that “pragmatism was often justified by the contention that many staff did not wish to be given leadership roles or to take on responsibility beyond their own class teaching” (p. 47). However, although pragmatic distribution is provisionally effective, it does not build capacity within the school and is not effective in the long-term.
From MacBeath’s (2009) research, distribution *strategically* was goal orientated, focused on improvement over the long-term, and on building capacity in the organization. New leadership roles were thoughtfully considered, and were distributed to those people who were loyal to the goals of the organization, and operated as members of a team. In strategic distribution, tasks were distributed to teams of people instead of individuals. This is because “when expertise becomes concentrated rather than distributed it weakens school culture and sustainability” (p. 48). MacBeath’s research revealed that when one individual was in a leadership role with specialized knowledge—like a computer network manager—the school was disadvantaged when that person left with their specialized knowledge.

Leadership was distributed *incrementally* by “letting go of top-down control” and “focus[ing] on professional development, building talent from within” (p. 49). In this form of distributed leadership, administrators became aware of staff members with leadership potential, and then nurtured their talent. As members of the team established their capacity for leadership, they were encouraged to take on more. This means that leadership was not governed by the hierarchy of experience or education, and that people new to the organization were able to take on leadership roles (MacBeath). The atmosphere of incremental distribution resulted in increased confidence and empowerment among staff members.

When leadership is distributed *opportunistically*, the principal does not mandate leadership roles. Instead, capable members of the school community (including staff and students) broadened their roles to new areas of leadership, because they had a natural predisposition to lead (Macbeath, 2009). From his research, MacBeath found that “clarity of purpose or pulling in the same direction was seen as a precondition” (p. 51) for opportunistic leadership. If this purpose is the vision of the school, opportunistic distribution is positive.
Conversely, if this purpose is a divergent view shared by a number of staff members, this may be destructive.

The final form of distribution revealed by MacBeath’s (2009) research is distribution culturally. Rather than being formally allocated through roles or people, this form of leadership was *embedded in the culture* and was exercised subconsciously. The atmosphere of a school with cultural distribution of leadership was characterized by trust, collaboration, and respect. MacBeath documented that “such an environment was not accidental or serendipitous but likely to have been carefully wrought, underpinned by a value system and a sophisticated conception of leadership” (p. 53). This implies that schools begin lower on the continuum, moving up as their understanding of leadership grows.

Although all of these forms of distributed leadership were found in the schools MacBeath (2009) studied, more interesting was his finding that none of the schools or the leaders fit into just one of the six categories. Although it seems desirable to move through the continuum from formal to cultural distribution, MacBeath found that “life in schools is never that elegantly simple” and that “leaders at all levels…draw on a repertoire of response modes, dependent on the situation in which the need for leadership is called upon” (p. 53). Likewise, teaching strategies vary in their sophistication. Effective teachers use a variety of strategies from simple to complex depending on the student and the environment. Similarly, the different forms of distributed leadership are “highly sensitive to a range of contextual factors in a continuing state of flux” (p. 54) such as the characteristics of the administrator, the culture of the school, and external pressures. Spillane et al. (2001) also found that patterns of distributed leadership differ, depending on the context of the learning community. Distributed leadership is influenced deeply by context and will continually shift.
Facilitators to Distributing Leadership

Distributing tasks across multiple people is challenging (Firestone & Martinez, 2007). To address this challenge Leithwood et al. (2007) studied what structures facilitated distributed leadership. Leithwood et al.’s findings suggested that “distributed patterns of leadership are nurtured when collaborative structures are established, when the number of people collaborating on an initiative is kept manageable, and when influence is exercised through expert rather than positional power” (p. 61). The implication for school divisions looking to use distributed leadership as a framework for leadership is that they should be sure that collaborative structures such as professional learning communities are already in place (MacBeath, 2009) before they change the roles of the people in the organization. In addition, care will have to be taken to ensure that the culture of the organization is cooperative rather than competitive, and that all members are working toward the same goal (Leithwood et al., 2007). Then, people will be able to defer to the person with the most expertise on an issue, rather than whoever can navigate the bureaucracy the best.

An additional facilitator is “an organizational culture which is open, encourages strong staff commitment to students and is free of favoritism and internal dissent” (Leithwood et al., 2007, p. 61). Prior to implementing distributed leadership, the organization will have to work hard to ensure that all the members have a common vision (Fullan, 2009). Continuous professional development is an avenue that could lead to this common vision, as well as continuous monitoring of the culture of the organization. Encouraging questions and dialogue about the process will decrease internal dissent (Leithwood et al., 2007). Conversely, a top-down approach where members of the organization are told what to do may increase dissent. In addition, formal leaders in the distributed network can motivate others by remaining committed
to the vision and role modeling collaboration with colleagues to support their learning (Leithwood et al.). The literature seems to suggest that in order for distributed leadership to flourish a collaborative, cooperative, open organizational culture is advantageous.

**Recognizing the Tensions in Distributed Leadership**

Although the literature reveals the many positive things distributed leadership might do for schools many researchers have also cautioned that there are negative aspects to distributed leadership, and that above all, it should be implemented carefully. Hargreaves and Fink (2006) found that in some situations, distributed leadership can be ineffective. For example, when “teachers are not well qualified and their knowledge base is weak…distributed leadership produces only pooled ignorance and prejudice rather than shared knowledge and professionalism” (p. 102). This means that context is imperative when considering whether or not to formally distribute leadership.

With all the literature supporting and promoting distributed leadership as an effective way of developing capacity and accessing collective knowledge, divisions or schools may try to implement distributed leadership, thinking it will be the practice that will cure the problems of traditional high schools that were discussed in the first section of this chapter. However, as Hargreaves and Fink identified, if leadership were distributed to people who lack knowledge, vision, and dedication, then positive change would be limited.

Another situation where distributed leadership may be less effective is with “a divided staff that has been bequeathed to an incoming principal by his or her predecessor” (p. 102-103); in these types of schools, the administrator must first work at establishing a safe, orderly culture before distributed leadership can be effective. Both of these examples illustrate that prior to distributing leadership, the school context must be considered. The tensions associated with
distributed leadership become even more significant when the impact of distributed leadership on teacher leaders is considered in the next section.

**The Nature of Teacher Leadership**

This review has moved from the broad topic of school reform, to one of its important drivers—distributed leadership. In schools, distributed leadership often emerges as teacher leadership. Because teacher leadership was the main focus of this study, a review of the literature in this area was important. This section reviews the different roles of teacher leaders, the characteristics of teacher leaders, what effective teacher leadership looks like, and the tensions in teacher leadership.

The literature on educational reform initiatives emphasizes the importance of leadership at the school level. A summary of Patterson (2001) reveals the evolution of the literature: Originally, the principal was thought to be the formal instructional leader, directing the work of teachers. Then, there was a shift to the principal working with teachers to develop professional learning communities. More recently, an emerging theme in the literature is the role of teacher leaders in school reform initiatives. Teacher leadership is an important aspect of school reform initiatives; this is because teacher leadership is connected to increased teacher learning and increased teacher learning is connected to improved student achievement (Margolis, 2008). Distinguishing the role of teacher leaders in school reforms, Katzenmeyer and Moller (1996) referred to teacher leadership as a sleeping giant, and stated that “by using the energy of teacher leaders as agents of school change, the reform of public education stands a better chance to succeed” (p. 2). In their research, Katzenmeyer and Moller found that teacher leaders were potential agents of school change, noting that they had great capacity for leadership because of
their close connections with students and because teachers are the largest group of school employees.

The literature on teacher leadership encourages more teacher participation in school decision making, giving the impression of confidence in teacher leadership. However, just like their findings on the negative aspects of distributed leadership, Hargreaves and Fink (2006) found that teacher leadership is not always effective or productive and that in some situations it “goes bad” (p. 107). From their research, they give an example of a high school where teacher leaders defended streamed classes because they were supported by influential parents and they were undemanding to teach, despite being less effective for students. In addition, Hargreaves and Fink warned that “teachers’ voices can exclude other voices, such as those of students or parents” (p. 107). The message is that teacher leadership does not necessarily guarantee good leadership. The potential disadvantages of teacher leadership will be examined later in this review.

**The Roles of Teacher Leaders**

An examination of the literature reveals that the roles of teacher leaders are numerous and vary according to context (Angelle & Schmid, 2007; Feeney, 2009; Firestone & Martinez, 2007; Katzenmeyer & Moller, 1996; Patterson, 2001; Reeves, 2008). Similar to the role of in-school administrator shifting from manager to instructional leader (Heck & Hallinger, 2005), teacher leadership roles are also evolving (Firestone & Martinez, 2007). For example, the formal role of department head has been “well established, but [has] traditionally been administrative and part of the regular structure of schools” (p. 6). However, teacher leadership has evolved from traditional roles like department head, to teacher leader roles established to “empower and
professionalize teachers” (p. 6). Traditional teacher leadership is not effective in bringing about change, supporting a movement to new teacher leadership roles (Feeney, 2009).

Teacher leadership is not new in high schools; formal teacher leaders such as department chairs or department heads have existed within the traditional structure of high schools for a number of years (Daniels, Bizar, & Zemelman, 2001). Feeney (2009) conducted a case study of all five department leaders at one high school (four female and one male) with a range of teaching experience from three to 20 years. Data collected included observations of department meetings, structured interviews with department heads, and artifacts like meeting agenda and notes. The case study was conducted over an 18 week period. The findings from Feeney’s study revealed that department heads were operating more as managers than as leaders. Although there was a high level of participation on the part of department heads, there was a lack of collaboration occurring, and managerial priorities dominated the work of department heads. At this high school, it seemed that leadership was seen as a position with conventional administrative duties, not as an opportunity to collaborate or learn. Feeney’s study revealed that distributing leadership should be focused on improving teaching and learning, and move away from the management of schools. This implies that high schools should move away from the traditional, managerial role of department head, and towards innovative, instructional roles for teacher leaders. Feeney’s findings are reminiscent of the ongoing investigation in the field of educational research on the changing role of the principal (Heck & Hallinger, 2005) shifting away from management and moving towards instructional leadership.

The shift from department heads as teacher leaders to contemporary instructional roles for teacher leaders can create tensions in high schools. Little’s (1995) study illustrates this conflict:
Emerging leadership roles in these schools challenge traditional subject affiliations and subject boundaries while taking little account of the meaning that high school teachers attach to subject as a basis of professional identity and community…the subject organization of schools and the subject affiliation of teachers remain powerful elements of teaching context, affecting the success of new organizational designs and goals (p. 49-50).

Little’s finding leaves the implication that the development of new teacher leader roles designed to encourage system reform may be met with some resistance. Siskin (1994) found that “departments present formidable barriers to school-wide communication and community” (p. 184). It seems that the bureaucracy of departments in high schools and the legacy of department head as teacher leader may intimidate contemporary teacher leadership focused on instruction.

Contemporary teacher leaders occupy various roles, including informal teacher leaders without titles, who may exercise leadership informally by offering casual workshops to their colleagues or by supporting colleagues with professional advice (Katzenmeyer & Moller, 1996; Patterson, 2001). The literature also reveals an abundance of specific formal roles for teacher leaders (Patterson, 2001; Reeves, 2008). Katzenmeyer and Moller (1996) identified roles for formal teacher leaders more generally as: leadership of students or other teachers, leadership of operational tasks, and leadership through governance or decision making. When considering these multiple titles, roles, and responsibilities, Angelle and Schmid’s (2007) findings are of particular importance: “School administrators and, often, teachers fail to distinguish between the role…of teacher leader and the practice of leadership” (p. 794). This implies that just because the teacher leader roles are created, it does not mean that leadership will be practiced. Teacher leadership must be nurtured and monitored.
The Characteristics of Teacher Leaders

The literature on school leadership has revealed a number of common characteristics in teacher leaders (Leithwood et al., 2007; Lieberman & Miller, 2004; Patterson, 2001; Rosenholtz, 1989). In some research, these characteristics have been self-attributed, and in others they have been reported by colleagues or administrators. After interpreting the literature, a number of significant characteristics of teacher leaders surfaced. Table 1 is a compilation of these characteristics and the studies in which they were referenced. While “knowledge, skills, and attitudes are important for teacher leadership” (Katzenmeyer & Moller, 2001, p. 13), these attributes do not routinely convert into guidelines on identifying and selecting formal teacher leaders (Murphy, 2005). Therefore, this table should not be considered a checklist for choosing teacher leaders. Rather, the synthesis of the literature in Table 1 reveals that teacher leadership is conceptualized in a number of different ways.

Table 1.

Teacher leader characteristics from selected studies

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These characteristics are a sample of the range of characteristics that have been attributed to teacher leaders. There are some contradictions in the list of characteristics. For example, enthusiastic and outspoken may be inconsistent with respectful and humble. Certainly, a person could be described in all four ways, but it seems unlikely. These varied characteristics, along with the multiple roles teacher leaders might assume, reveal that teacher leadership is complex. Some of the characteristics appear more often than others in the table; perhaps this reveals that they are a more important feature in a teacher leader. If that is the case, then respectfulness is a necessary quality in a teacher leader.

A different way of looking at the characteristics of teacher leaders may be to compare them to other leaders in the organization. In their study of a large urban school division in Ontario, Leithwood et al. (2007), found that the characteristic of leaders in non-administrative roles (like a teacher leader) aligned with the literature on the characteristics of formal administrative leaders. Perhaps this means that teacher leadership is a training ground for new administrators. Little’s (1995) research substantiates this; in a case study conducted in one high school three of four teacher leaders divulged plans to enter administration during the interviews she conducted. Or, perhaps Leithwood et al.’s (2007) finding means that in order to lead effectively, people need to have those personal and professional characteristics.

One study, conducted by Angelle and Schmid (2007) is particularly enlightening with regard to teacher leaders in the context of high schools. The study was conducted in 11 schools in a south-eastern state in the United States and included semi-structured interviews with 51 teacher leaders and 14 principals with the intent to identify the characteristics of teacher leaders. Of the interviews, 55 percent were conducted with elementary teacher leaders and principals, 26 percent in middle schools, and 18 percent in high schools. From the data collected at these
Interviews, a number of themes were identified as qualities of teacher leaders. Teacher leaders were found to be: (a) decision makers; (b) educational role models; (c) positional designees who facilitated and conveyed information; (d) supra-practitioners who put in extra time and effort; and (e) visionaries who focused on the school climate and culture. This study was not included in Table 1 as Angelle and Schmid found that these educators had a misrepresented view of teacher leadership because of the social structure in their context. Few participants in the study saw teacher leaders as visionaries, and the important notions of collaboration and student learning were missing from the interviews (Angelle & Schmid). The results of this study imply that sometimes teacher leadership can manifest in different ways. It seems that it is important for administration to monitor teacher leaders.

Of particular interest in Angelle and Schmid’s (2007) study, high school respondents appeared to have a misrepresented view of teacher leadership. “Demonstrating excellence in the classroom and devoting long hours to school service” (p. 792) and having “superior classroom skills” (p. 793) was how high school teachers and high school principals identified teacher leaders. Considering what has been discussed thus far about the potential of teacher leadership, the focus on administrative tasks (decision making) and hard work (supra-practitioners) is not a complete representation of the possibilities for teacher leadership. Angelle and Schmid’s research reveals that the structure of schools (particularly high schools) can leave educators with a misrepresented view of teacher leadership. Missing from the results in the study is the notion of collaborating with colleagues to improve teaching and learning (Angelle & Schmid, 2007). This reveals that the pervasive isolation and autonomous nature of high schools may impact how teacher leaders perceive their roles. Angelle and Schmid’s study revealed that when it comes to
teacher leadership, context is important; the culture high schools must be changed if teachers are to experience teacher leadership differently.

**Teacher Leaders and Staff Development**

As discussed in the first section of this chapter, professional development of teachers is an important driver in school reform initiatives. From a review of the literature, there is a developing trend of formal teacher leaders being asked to oversee this professional development (Margolis, 2008; Reeves, 2008). A recent phenomenological study of 32 teacher leaders from 15 different schools (Margolis, 2008) was designed to gain an understanding of how teacher leadership plays out in schools, and what the experience of leading staff development activities was like for teacher leaders. The study consisted of observations from all 15 schools’ staff development sessions and phenomenological interviews with all 32 teacher leaders. Margolis found that teacher leadership showed promise in school reform efforts, but provided the caveat that school systems and administrators need to ensure that school environments allow teacher leadership to thrive. In particular, Margolis indicated that the principal plays an important role in support through resources, and in the emotional support of teacher leaders. In schools where principals encouraged distributed leadership, teacher loyalty and confidence was inspired. Given that professional development of teachers is essential for effective school reform, it is useful to further consider the results of Margolis’s study.

Margolis’s (2008) study revealed a number of effective approaches for teacher leaders in conducting professional development for teachers. A main theme from the interviews was that teachers’ knowledge of teaching enabled them to design more effective professional development activities for their colleagues (Margolis, 2008). This supports Firestone and Martinez’s (2007) finding that knowledge of teaching content areas impacted teacher leaders’
capacity for influencing their colleagues. Specifically, when leading staff development sessions with their colleagues, Margolis (2008) found that teacher leaders were most effective in presenting professional development when they: developed a safe, comfortable environment, validated the work that teachers are already doing, used a variety of presentation styles, and accentuated the relevance of the learning, and the ease with which it could be implemented in the classroom. Besides these strategies, Margolis found that the use of humor in presentations “de-constructed [the teacher leaders’] power …and engaged teachers in discussing difficult issues” (p. 302). The interviews revealed that the use of humour was not accidental, but strategically used to create a relaxed environment. Related to this, Margolis observed that teacher leaders who emphasized their own learning, admitted their own difficulties, and who were humble in their approach were more effective than those who appeared arrogant. This humility was also found to be a characteristic of teacher leaders by other researchers (see Table 1). Other strategies that were found to be less effective were teacher leaders who talked too much or went over too many strategies during the session. An understanding of these effective and less effective strategies will be useful in analyzing teacher led staff development in other reform initiatives.

**Issues of Effectiveness**

Several researchers have conducted studies of effective teacher leaders (Firestone & Martinez, 2007; Katzenmeyer & Moller, 1996; Lieberman & Miller, 2004) and have isolated what enables those teacher leaders to be effective. Firestone and Martinez (2007) found that teacher leaders’ capacity to influence teaching practices positively was dependent on three things. One was the time that they had to act as a teacher leader. In some cases, teacher leaders were given administrative tasks by their principals “that took them away from working with teachers” (p. 25). The second was their knowledge of the content being taught and the materials being
used to teach it. The third was the quality of their relationships with teachers. This implies that the most knowledgeable teacher leader may not be successful in a teacher leader role if they are not able to develop relationships with their colleagues. Conversely, a socially savvy teacher will only be an effective teacher leader if they are knowledgeable in what they are leading. And, a teacher leader who possesses the knowledge and the social ability to be an effective teacher leader may not have the capacity to execute their role if they are assigned duties that take them away from working closely with teachers.

Lieberman and Miller (2004) reported several case studies of teacher leadership that detailed the stories and practices of effective teacher leaders. This description of an effective teacher leader is particularly useful:

Her approach is to always model participation, build habits of mind, and support people in becoming apprentices to their own learning. She often shows her colleagues how she teaches: how she engages students in a variety of learning activities, how she encourages the development of their own voice, and how she places student work at the center of her teaching. By demonstration rather than remonstration, she allows others to see that it is possible for all students to achieve, no matter what their social, economic, cultural, or educational circumstances (p. 60).

This teacher leader is taking the effective practices she uses in her classroom and employing the same strategies in leading her colleagues. From this statement, it appears that the absence of power and authority that characterizes the relationship of teacher leaders with their colleagues can be more effective than the positional power a supervising administrator has over a teacher.

The relationships teacher leaders have with those around them also impact their effectiveness (Katzenmyer & Moller, 2001; Murphy, 2005; Pellicer & Anderson, 1995). One of
these relationships is the relationship between teacher leader and administrator. Administrators must ensure that teacher leadership is supported, and that the school culture is open to the tenets of distributed leadership (Murphy, 2005; Pellicer & Anderson, 1995). Katzenmeyer and Moller (2001) found that when teacher leadership is effective, administrators “make teacher leadership a priority and take risks to provide teacher leaders what they need to succeed” (p. 85). If administrators are not supportive and not willing to provide resources, teacher leaders cannot be effective. Teacher leaders are effectual when they have respectful, professional relationships with their teaching colleagues (Katzenmeyer & Moller, 2001). Katzenmeyer and Moller found that teacher leaders can build on the pre-existing relationships they have with colleagues to advance the goals of their teacher leadership initiative. When teachers take on a formal leadership role, their relationships change (Pellicer & Anderson, 1995). It is important for teacher leaders to keep these relationships supportive and diplomatic if they are to be effective in their role as teacher leader.

**Tensions in Teacher Leadership**

Teacher leadership is not without tensions and not all the research on teacher leadership is completely positive. Researchers have found some possible negative aspects of teacher leadership (Cameron, 2005; Firestone & Martinez, 2007; Hargreaves & Fink, 2006). Firestone and Martinez’s (2007) research on teacher leaders exposed constraints that teacher leaders encountered. One difficulty was a lack of time for individual coaching with teachers. A second tension was the ambiguous role of teacher leaders, where both the teacher leaders and their colleagues were unsure of their authority, and in some situations, their purpose.

In a 2005 study, Cameron conducted interviews with 20 of 38 teachers at one American high school that operated under a collaborative framework, where all members of the
organization were distributed the leadership task of decision making. Additionally, the interview sample included 10 students (most of them senior students in their last two years), the principal, the assistant principal, and a counsellor. Through a series of unstructured, narrative interviews, Cameron found a number of issues that arose out of teacher leaders working in a collaborative framework. Collaboration increased teachers’ work load, compromising the work they did in the classroom and depleting their energy. In addition, collaboration resulted in forced shared visions which in some cases conflicted with what was actually happening in classrooms. Although the culture was supposed to be collaborative, some administrators still used positional power to influence decision making. In this structure, teachers were reluctant to become teacher leaders and open themselves up to the criticism of their colleagues.

Although collaboration has the potential to positively affect teaching and learning (Elmore, 2000; Reeves, 2009), there are definite tensions that arise with the use of collaborative, distributed leadership models. As Cameron’s (2005) study revealed, teachers may have less time, power may be manipulated, leaders may worry about being critiqued, and creative work in the classroom may decrease. While the negative aspect for the school may be that creative work in the classroom is decreased in favour of what is collaboratively decided, the personal tensions that seem to be arising for teacher leaders is an important issue. One of the teachers stated: “you open yourself up to negative criticism from your peers. Sometimes it is subtle. Sometimes it is overt” (Cameron, 2005, p. 326). This statement reveals that there is a personal and social cost to teacher leaders despite the positive effects of distributing leadership using a collaborative model.

Similarly, in their discussion of teacher leadership, Hargreaves and Fink (2006) found a number of tensions that arose for teacher leaders when they were formally appointed to their roles. Although some teacher leaders welcomed the extra responsibility and opportunity to lead,
“others found their new role problematic” (p. 108), as their roles were not always clearly defined and sometimes conflicted with existing leadership positions, such as department heads. Another pressure for some teacher leaders was the difficulty of carrying out the teacher leader responsibilities and continuing to meet the classroom teacher responsibilities. In addition, teacher leadership sometimes altered preexisting relationships with colleagues, creating resentment on the part of those who were not chosen for the appointment. These tensions reveal a need for caution in utilizing the strategy of appointing formal leaders. If teacher leaders are going to be appointed, a plan should be developed to help negotiate the possible tensions that may arise.

In considering the inhibitors to teacher leadership, all of the inhibitors to distributed leadership mentioned in the second section of this review must be considered. There are also additional inhibitors that are specific to teacher leadership, having to do with the organizational context and personal qualities of the teacher leader (Margolis, 2008). The traditional school structure can inhibit teacher leadership, as traditionally, isolation and bureaucracy have conflicted with the ideals of teacher leadership (Margolis, 2008). In addition, social structures can act as a barrier. For example, hierarchies within the culture of the school can prevent teachers from taking on leadership roles. These hierarchies may include an emphasis on experience in terms of years of teaching or gendered norms that exist in the structure of the organization. In addition, the professional isolation that teachers traditionally face may prevent them from taking on a leadership role. Lack of confidence has also been found to be an inhibitor to teacher leadership. However, more chances to act as a teacher leader reduce a fear of leading (Margolis, 2008). Margolis’s research reveals that bringing teachers into leadership roles will help teachers develop as leaders and their lack of confidence will diminish.
Summary

Educational literature presents a convincing rationale for initiating school reform in high schools. However, in moving towards sustainable reform, there are challenges (such as resistance to change) that emerge; these tensions must be anticipated and contended with (Fullan, 2009). The literature reveals six ways of driving school reform initiatives: constructing a powerful vision, utilizing interjurisdictional comparisons, conceptualizing instructional leadership as a change agent, employing a distributed leadership model, developing empowered professional teachers, and providing compelling professional development. School leaders developing a high school reform initiative should be cognizant of these drivers when implementing changes.

Distributed leadership is an important driver in school reform initiatives, particularly in the context of this study. Distributed leadership differs from traditional school leadership models. In a model of distributed leadership, the responsibility for leading is spread across the organization, regardless of hierarchy. This is in contrast to a traditional school leadership model where the principal is responsible for leading all members of the organization. A number of different forms of distributed leadership exist, and challenges and opportunities exist in all of these forms. School leaders should take into account their context when deciding how best to distribute leadership (MacBeath, 2009), and must bear in mind that distributed leadership needs to be monitored and nurtured.

When considering the introduction of formal teacher leaders to a school or school system, there are many possible ways of distributing leadership to teachers. The literature on teacher leadership focuses on the roles that teacher leaders have in schools, and on the characteristics teacher leaders exhibit as they act out these roles. Teacher leaders’ effectiveness is influenced by
their relationships with their colleagues and supervisors, their knowledge of teaching and learning, and the time and training they are given to conduct their responsibilities. There are potential benefits and possible tensions that might arise with teacher leadership as a component of a school reform initiative.

This study is an in-depth look at the actual experiences of teacher leaders in the context of a school reform initiative. It is hoped that this study’s description of the essence of teacher leadership within Ford Park Schools increases awareness of the possibilities and challenges that exist in teacher leadership.
CHAPTER 3

RESEARCH DESIGN AND METHODOLOGY

In this chapter, philosophical assumptions, the rationale for the research design and the research context are described. Processes for data collection and data analysis are outlined, and ethical considerations are addressed.

Philosophical Assumptions

Guba and Lincoln (1994) analyzed four competing paradigms of inquiry in conducting research: positivism, postpositivism, critical theory, and constructivism. My research took a constructivist orientation. In the constructivist paradigm reality is socially and experientially constructed (Guba & Lincoln). The anecdotes and stories shared by teacher leaders were constructed by how they consciously interpreted the events. In terms of epistemology, the researcher and the purpose of the research are so completely connected in a constructivist approach, that the results are actually created during the process of the study (Guba & Lincoln).

Creswell (2007) noted that “phenomenology has a strong philosophical component to it” (p. 58). Both Creswell and van Manen (1990) emphasized the importance of understanding the philosophical assumptions of a phenomenological study before embarking on it. Creswell (2007) summarized the philosophical assumptions of a phenomenological study: (a) the focus of the study is on the lived experiences of the participants; (b) the experiences of the participants are conscious experiences; and (c) the essence of these experiences is the focus of the research, and the experiences are described and interpreted rather than explained or analyzed. In my study, this meant focusing on the lived experiences of teacher leaders, taking care to describe these experiences rather than analyze them. It also meant explaining the philosophy of
phenomenology to the research participants, so that during data collection, they focused on describing their conscious experiences, and refrained from evaluating their experiences.

**Research Design and Rationale**

Phenomenological studies describe the meaning, for several individuals, of their lived experiences of a concept or a phenomenon, finding what all participants have in common as they experience a phenomenon. Creswell (2007) indicated that the purpose of a phenomenological study is to reduce individual experiences with a phenomenon to a description of the universal essence. In this study, the experiences of teacher leaders were reduced to a description of the essence of what it means to be a teacher leader.

The purpose of my study was to provide a resonant description of what it means to be a teacher leader in the context of high school reform. Creswell (2007) described the appropriate conditions for a phenomenological approach to research: “The type of problem best suited for this form of research is one in which it is important to understand several individuals’ common or shared experiences in order to develop practices or policies, or to develop a deeper understanding of the features of the phenomenon” (p. 60). A phenomenological approach was deemed appropriate, as the research question sought to determine what the experiences of a teacher leader were like, and how teacher leaders constructed meaning within the context of high school reform.

As illustrated earlier, a phenomenological approach is also appropriate for this research because of my own experiences with the phenomenon. Shank (2002) recognized that the “phenomenological process always begins, in some fashion, with the individual person and that person’s awareness of the world” (p. 85). My own experiences influenced my decision to research the phenomenon of teacher leadership. However, when researchers have bias it is
important to choose a research design that prevents and restricts their perspective from clouding their findings. Phenomenology does just that:

Phenomenology, step by step, attempts to eliminate everything that represents a prejudgment, setting aside presuppositions, and reaching a transcendental state of freshness and openness, a readiness to see in an unfettered way, not threatened by the customs, beliefs, and prejudices of normal science, but the habits of the natural world or by knowledge based on unreflected everyday experience (Moustakas, 1994, p. 41).

Using a phenomenological research design in my research allowed me to fully describe the experiences of the study participants. Shank’s (2002) description of phenomenology describes it as “a form of interpretation that says human consciousness is the key to understanding the world” (p. 81). The goal is to begin with that conscious awareness (in my study, an awareness of the phenomenon of teacher leadership), and then transcend it by putting aside all biases and prior positions. Shank noted that only after this bracketing takes place can the researcher “see the world as it really is” (p. 81).

This study was conducted in a large urban school division in Saskatchewan (Ford Park Schools). As illustrated in Chapter 1, one of this school division’s strategic priorities was high school reform. As part of this initiative, two to three formal teacher leader positions were created in each of the high schools. The formal teacher leaders met as a group regularly at a central location for professional development opportunities, collaboration time, decision making, and planning. They were provided with a substitute to cover their classroom when they were asked to attend these full day meetings. In this study, the participants were selected from this group of formal teacher leaders.
Research Methods

This study follows several of the tenets related to phenomenology. Therefore, several of the issues and concerns related to phenomenology are associated with this study, and are outlined here. Hycner (1985) recognized that “[t]here is an appropriate reluctance on the part of phenomenologists to focus too much on specific steps” (p.279). Hycner theorized that a researcher cannot impose a method on a phenomenon, instead the “method must arise out of trying to be responsive to the phenomenon” (p. 280). In this study, this meant that while a process was planned, the method evolved in response to what was learned about the experiences of teacher leaders. In his analysis, van Manen (1990) stated “while it is true that the method of phenomenology is that there is no method, yet there is tradition, a body of knowledge and insights, a history of lives of thinkers and authors” (p. 30) which can be used as a guide in developing a study.

The data collection and data analysis methods of this study were designed using the work of Creswell (2007), Moustakas (1994), and van Manen (1990). The requisite openness and flexibility to the study design were essential as described by Hycner (1985) and van Manen (1990) and were held in reserve during the study, and employed as necessary. The selection process for participants, the methods of data collection, the settings for data collection, the process of data analysis, and the ethical considerations in this study follow.

Considering intentionality and reaching epoche prior to data collection. A number of researchers in the area of phenomenology have found that some assumptions are necessary in conducting phenomenological research. In conducting interviews, the researcher must assume and examine the intentionality of the participants (Beech, 1999). Intentionality implies that people are inseparably connected to the world, and all human activity is oriented to something
Beech (1999) found that all participants possess intentionality, and will have motives for their actions and interpretations. As well, all participants should be expected “to have intentionality towards the phenomenon being investigated” (p. 41) as they are conscious of it because of the research. In this study, the intentionality of the participants could not be bracketed.

The researcher also has intentionality, because there is a “purpose in carrying out [the] research” (Beech, 1999, p. 41), and this cannot be bracketed away. As well, according to Beech, researchers have intentionality towards the very thing they are researching, because of their past experiences and also because of the research they have conducted on the phenomenon. Creswell (2007), Moustakas (1994), and van Manen (1990) advised that before data are collected, the researcher must examine his/her own experiences of the phenomenon being studied. I have done this in Chapter 1 in the positionality section, and have recognized my own presuppositions. Moustakas (1994) explained that epoché is the freedom of suppositions, and in this stage the researcher sets aside their prejudgments, biases, and preconceived ideas about the phenomenon. This important process was carried out prior to data collection to ensure valid data.

Bracketing my own experiences as a teacher leader enabled me to position myself in the research. I was linked to the phenomenon by past experience and bracketed this experience in order to interpret the experiences of the participants without bias. In “explicating assumptions and pre-understandings” (van Manen, 1990, p. 46) the researcher is aware of their assumptions and holds them “deliberately at bay” when conducting data collection and analysis. This meant recognizing my own biases about teacher leadership, and not allowing them to influence my questioning and prompting during data collection. It also meant analyzing the data openly, from a fresh perspective, without allowing my own prejudgments to cloud my analysis. Beech (1999)
referred to this as *unknowing*, meaning not forgetting, but “remain[ing] mindful of the phenomenon while unknowing experiences of it” (p. 45). According to Moustakas (1994) it is impossible to accomplish *epoche* completely, but the work of understanding biases and preconceptions in relation to teacher leadership helped me to remove these same biases from the interpretations of participants’ experiences.

**The participants.** In this study, purposeful sampling was used to select study participants. According to Merriam (1998) purposeful sampling is an appropriate sampling strategy in qualitative research, and is “based on the assumption that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned” (p. 61). To facilitate purposeful sampling in this study, once permission to access was obtained, the formal teacher leaders in the division were contacted by e-mail. Included in this e-mail was a letter of invitation inviting teacher leaders to complete what van Manen (1990) termed *protocol writing* which is “the generating of original texts from which the researcher can work” (p. 63). These original texts allowed me to identify key informants for further interviews, and they helped to refine questions for the in-depth, semi-structured interviews.

According to van Manen (1990), the researcher needs to “search everywhere in the lifeworld for lived-experience material” (p. 53). Collecting the individual stories of teacher leaders deepened my understanding of the phenomenon of teacher leadership, which was helpful during data collection and data analysis. According to van Manen, this is an uncomplicated approach, but its disadvantages are that some people find writing difficult, and writing forces reflection, instead of active conversation. To address these potential disadvantages, examples of a written account of a lived experience was shared, the task was carefully explained, and the
description focused on the general experiences that the participant had as a teacher leader. To produce the protocol writing, writing prompt was used (included in Appendix D). Protocol writing samples were collected over a three week period in April and May, 2010. Participation in the protocol writing was optional, and participants’ informed consent was obtained. The protocol writing was used to identify key informants for further interviews, and to provide a context for the person’s experience prior to conducting interviews. In addition, excerpts from the protocol writing were presented as a preface to the data in Chapter 4.

Once teacher leaders were identified as potential participants from the protocol writing, they were contacted by telephone and/or e-mail and asked to participate in the study, provided they met the criteria for selection of participants in phenomenological research as defined by Moustakas (1994): “the research participant ha[d] experienced the phenomenon, [was] intensely interested in understanding its nature and meanings, [was] willing to participate in a lengthy interview” (p. 107), was open to follow-up interviews, agreed to having interviews recorded, and agreed that the data may be published. When participants were invited to participate in the study, criterion sampling was used to ensure that all of Moustakas’ criteria were met by participants. To begin, three participants were selected; this number of participants was successfully utilized in similar phenomenological studies (Prytula, 2008). If additional interviews had been required, participants would have been chosen from the original protocol writings.

**Data collection.** In phenomenological studies, data collection usually includes conducting multiple in-depth interviews with participants (Creswell, 2007). This study consisted of a minimum of two in-depth, semi-structured interviews with each participant. In addition, e-mail and telephone contacts to clarify data were carried out as required. As well, Creswell (2007) suggested that data collection in phenomenology could also include the gathering of texts and/or
artifacts – in this study that included collecting personal texts, division documents and e-mail correspondence from participants. Texts and artifacts helped the participant to describe their experiences, and provided context for their lived experiences.

**The setting for the interviews.** The interviews for this research were conducted at a location of the participant’s choosing. Interviews took place at the participants’ schools and at other locations at the direction of the participants. Moustakas (1994) advised, “the interviewer is responsible for creating a climate in which the research participant will feel comfortable and will respond honestly and comprehensively” (p. 114). Regardless of the location, great care was taken to ensure that participants felt safe and comfortable in their surroundings.

**The interview method.** This study used an in-depth, semi-structured interview method to collect data. The specific phenomenon of focus in this study was teacher leadership, and more specifically, teacher leadership in the context of an effective high school reform initiative. Creswell (2007) and Moustakas (1994) emphasized that it is critical to ask open, wide-ranging questions during interviews. With this in mind, the primary interview questions in this study were designed to allow the descriptive data to emerge:

1. How did you become involved as a teacher leader? Tell me your story.
2. What have been your experiences as a teacher leader?
3. What circumstances or conditions have influenced or shaped your experiences of being a teacher leader?
4. Think of a specific instance, situation, person, or event from your experience as a teacher leader. Then explore and describe the whole experience to the fullest.
Other questions were asked for clarification or to encourage more description during the interviews, but these four broad questions focused the responses of the participants on the phenomenon of teacher leadership. Moustakas (1994) recommended making the interview “an informal, interactive process” with “open-ended comments and questions” (p. 114). A set of questions were developed that attempted to encourage a complete sharing of the experience of teacher leadership, but as Moustakas suggested, they were varied and altered depending on the direction the participant took the interview. As Beech (1999) suggested, to bracket my own knowledge and experiences from the interviews, I did not agree or disagree with the statements that participants made, but rather “attempt[ed] to elicit more information” (p. 49). The interview method evolved as the study moved forward, and peer debriefing and member checks were conducted during the data collection process to ensure that the data and its interpretation were trustworthy.

**Data analysis.** To fully discover the fundamental nature of teacher leadership, the data analysis stage of this study used features of the work of Creswell (2007), Moustakas (1994), and van Manen (1990). Data analysis of phenomenology is primarily an exercise in reflective writing (van Manen). The textual activity is the “descriptive study of lived experience (phenomena) in the attempt to enrich lived experience by mining its meaning” (p. 38). Prior to writing the descriptive synthesis, I went through the processes of phenomenological reduction and imaginative variation.

The first process in the data analysis was phenomenological reduction, where the data was mined for key statements that “provide[d] an understanding of how the participants experienced the phenomenon” (Creswell, 2007, p. 61). Then, these statements were organized into themes or clusters of meaning (Moustakas, 1994), which were used to write the initial
description (the textual description) of what the research participants experienced. In clustering these themes, van Manen (1990) suggested going through a transcript several times and looking for the statements that “seem particularly essential or revealing about the phenomenon” (p. 93) and identifying them (in this study they were highlighted). Phenomenological reduction occurred after subsequent interviews as well.

The statements and themes from the interviews were also used in the process of imaginative variation, where a structural description of “the context or setting that influenced how the participants experienced the phenomenon” (Creswell, 2007, p. 61) was developed. For example, the building that a teacher leader worked in, or the administrator a teacher leader worked with influenced the participants’ perception of teacher leadership. According to van Manen (1990), imaginative variation allows the researcher to “verify whether a theme belongs to a phenomenon essentially (rather than incidentally)” (p. 107). Themes that arise may appear to be related to being a teacher leader because of the context in which the teachers are doing their work. For example, a teacher leader experiencing a personal issue such as a divorce, or a death in the family may experience a great deal of stress in their work as a teacher leader. However, imaginative variation would reveal that the stress is an incidental theme, related to the personal issue as opposed to the experience of teacher leadership.

Finally, using the structural and textural descriptions, a synthesis was written, which is a “composite description that presents the “essence” of the phenomenon” (Creswell, 2007, p. 62). In this study, this is the core description of the lived experience of selected teacher leaders in Ford Park Schools, and “represents the culminating aspect” (p. 159) of a phenomenological study of teacher leadership. According to van Manen (1990) “the essence or nature of an experience has been adequately described in language if the description reawakens or shows us
the lived quality and significance of the experience in a fuller or deeper manner” (p. 10). In this study, the process of data analysis aimed to result in an evocative description of what it is to be a teacher leader in a high school undergoing reform. Throughout the process of data analysis, I used peer debriefing, member checks, and consulted with my research advisors to ensure that my analysis of the data was sound.

Piloting the method. Prior to collecting the protocol writing, the method was piloted with two formal teacher leaders. These individuals were asked to participate in this role as they would not have been suitable participants for the formal research – one had recently left the teacher leader role and one was too personally close to me. This data was not used in the analysis, but tested the process and the writing prompt. Similarly, prior to conducting the in-depth, semi-structured interviews, the interview process and questions were piloted with two people. Again, this data was used to test the rigor of the method, and whether the questions allowed for the collection of meaningful descriptive data. An additional aspect of piloting in this study was to test the process of phenomenological reduction and imaginative variation with my research advisors.

Quality and Trustworthiness of Research

Guba and Lincoln (1999) acknowledged that naturalistic research (like this study) is sometimes deemed untrustworthy. This study utilized the suggestions and techniques of Guba and Lincoln to give confidence to the data collected, which help to “persuad[e] a consumer of its meaningfulness” (p. 148). In judging the trustworthiness of qualitative research, Guba and Lincoln identified four standards: credibility, transferability, dependability and confirmability.
Credibility means that the data and analysis assembled are credible or realistic in the view of the participant. To encourage credibility of research, the following practices of Guba and Lincoln (1999) were used: (a) the research extended over a period of time sufficient to reveal the phenomenon of teacher leadership; (b) peer debriefing was used between contacts with participants to receive advice, assess understandings, and put aside personal interpretations of the phenomenon; (c) other texts and/or artifacts, including personal texts, division documents, and e-mail correspondence were collected and used to check data; and (d) member checks were conducted during the study to ensure the data and its interpretation were credible, and at the completion of the study, participants completed an overall check of the data and signed a consent form for data transcription release (included in Appendix C).

Transferability refers to the extent to which others can recognize the results of a qualitative study in their own context (Guba and Lincoln, 1999). In this study, Guba and Lincoln’s recommendation of using purposeful sampling was used to ensure quality data were collected. To allow educators from other situations to come to sound conclusions with regards to transferability, some contextualization of the school division and the reform initiative was given in Chapter 1. Related to transferability, Clandinin and Connelly (2000) suggested that verisimilitude should also be considered in evaluating a qualitative study. The concept of verisimilitude centers on allowing others to recognize their own contexts or experiences in the research, and is concerned with how the research resonates with others when they reflect on their own experiences. To enhance verisimilitude in this research, definitions specific to the study were included to facilitate a deeper understanding of the setting, situations, and particular experiences within those contexts. Then, other educators will be able to decide if the results of my study are transferable to their own context.
Dependability acknowledges that results in qualitative research cannot be replicated (as they can in quantitative research) because the context in which the research is conducted will change. Along with changing contexts, research designs are also constantly evolving. Guba and Lincoln (1999) found that to accomplish a dependable qualitative study, the researcher should be consistent in their approach to data collection and analysis, and retain appropriate documentation. In this study, dependability was supported by the cataloguing of transcripts, correspondence, electronic documents, digital audio files, researcher notes and drafts, as well as the account of the synthesized findings.

Lastly, “confirmability shifts the emphasis from the certifiability of the enquirer to the confirmability of the data” (p. 147) referring to the degree to which the results could be corroborated. In this study, transcripts were read several times during the data analysis process, and analyzed using phenomenological reduction and imaginative variation. As well, peer debriefing was used to affirm the way the study was conducted, and to recheck interpretations. Data were also shared and interpretations were checked with research advisors.

**Ethical Considerations**

This study followed the research protocol established by the University of Saskatchewan ethics board. The application for the approval of this research is included as Appendix A. Ethical considerations particular to phenomenology and relevant for this study follow. To protect the confidentiality of the research participants, this study followed Creswell’s (2007) suggested procedures: (a) participants were assigned aliases; (b) a composite portrayal of experiences was depicted (instead of individual stories); (c) the purpose and procedures of the study was fully disclosed to participants, and informed consent was obtained; and d) identities, locations, and events were given aliases in the raw data. The consent form for this study is
included in Appendix C. In addition to these procedures, Moustakas (1994) found the need to develop procedures for insuring that information that is considered private, or possibly damaging is removed or disguised; while using aliases will help with this, another measure is to have research participants review and confirm or alter the data to fit with their perception. Participants were asked to sign a consent form for data transcription release, included in Appendix C.

**Summary**

In conducting a phenomenological study, it is important that participants are carefully selected to ensure opportunities for resonant data collection. This chapter has identified the methodology to be used and the ethical issues of concern. Ultimately, conducting phenomenological research requires a flexible timeline and methodology; in this study, the participants will guide both.
CHAPTER 4
PRESENTATION OF THE DATA

Teacher leadership is an integral aspect of school reform initiatives. However, it seems that absent from the current literature on teacher leadership are the experiences of teacher leaders in the context of school reform. The purpose of this study was to examine the experiences of teacher leaders involved in a formal teacher leadership role as part of a high school reform initiative. Using phenomenology, this study attempted to draw out the essence of what it means to be a teacher leader and how the teacher leaders involved in this study made sense of their experiences. This chapter begins with a brief review of the data collection and the analysis procedures used. This is followed by a presentation of protocol writing excerpts from selected teacher leaders in Ford Park Schools. Then, the data are presented for both research questions. The chapter ends with a summary of the data.

Data Collection

After obtaining permission from Ford Park Schools to conduct my research I obtained a list of formal teacher leaders from the coordinator of the reform initiative at Ford Park Schools central office. Using this list, all potential participants were contacted by electronic mail (included in Appendix B) on April 12, 2010. The e-mail was to make teacher leaders aware that I would be contacting them individually to further explain the protocol writing stage of the study. This initial communication or pre-contact (Linsky, 1975) briefly introduced my research and included a letter of invitation to participate in the protocol writing stage of the study. After this initial communication, teacher leaders were contacted individually by telephone at their schools. Over the telephone I described the protocol writing exercise, answered questions, and then asked if the individual was willing to consider participating in the protocol writing phase of the study.
If they showed interest in participating a second e-mail (included in Appendix B) was sent to the individual. This e-mail included a brief slideshow explaining the rationale of the study and basic methodology. In addition, the informed consent form (included in Appendix C) for participating in the protocol writing exercise and the instructions for participating in the protocol writing were included. Participants were encouraged to e-mail or telephone if they had questions or concerns and I also offered to meet with them personally to go through the activity if they so wished. Participants were asked to return the protocol writing piece within a range of seven to fourteen days.

Of the 23 potential participants from the division list, two declared that they were unable to participate in the protocol writing. A third was ineligible because of involvement in the pilot study. The remaining 20 all received the second e-mail as detailed above. In the first weeks of collecting the protocol writing I had received six protocol writing pieces. During the recruitment phase of this study, I also had the opportunity to present my research at a meeting of teacher leaders. During my presentation I was able to further explain my study and ask teacher leaders to consider participating. After this meeting I received four more protocol writing submissions, bringing my total to ten. During the meeting of teacher leaders, an additional participant was discovered. This participant had been a formal teacher leader within Ford Park Schools but had moved into a new role. After hearing about my study during the presentation she offered to submit a protocol writing piece on her experience as a teacher leader, providing the study with 11 protocol writing pieces.

The primary purpose of the protocol writing exercise was to identify potential participants for the interview portion of the study and to assist me in developing questions for the interviews. Additionally, the protocol writing is presented as data in this Chapter. Protocol
pieces were received between April 22, 2010 and May 3, 2010. The pieces were read as they were received. Once eight of the pieces had been collected they were reread and those pieces that were thought to best address the lived experience (van Manen, 1990) were identified. This meant that the participant evoked the senses in their description and that the richness of their experience was evident in their writing. I then shared these eight pieces with my research advisors. At this time, I compared my own interpretation as to which pieces best addressed the lived experiences to the views of my research advisors. This process resulted in a pool of potential participants being selected. After I received the next three pieces I also chose one of these pieces to be included in the pool of potential participants.

Teacher leaders were invited to participate in the main part of the study based upon their protocol writing pieces. From the pool of potential participants, three were invited to participate in the interview portion of the study. At this time, criterion sampling was used to ensure that the criteria identified by Moustakas (1994) for strong phenomenological interviews were met: the participant had in fact experienced the phenomenon, was interested in understanding the phenomenon and its meanings, was willing to participate in a long in-depth interview, was open to follow-up interviews, agreed to have interviews recorded, and agreed that the data could be published. In-depth semi-structured interviews were conducted with three separate participants: Lane, Devin, and Jordan. Each participant was a teacher leader in the context of a high school reform initiative at the time of the study. Two participants were male and one was female. All three invited participants accepted the invitation to participate.

The interviews were conducted over a period of approximately three weeks between May 17 and May 31, 2010. Each participant was interviewed twice. The first interview focused primarily on the experiences of teacher leadership and the second interview elaborated on these
experiences and how participants made sense of them. All of the interviews were digitally recorded and were personally transcribed by me. Before the second interviews were conducted, the transcripts of the first interviews were analyzed individually with the philosophy of phenomenology in mind. Bracketing my own experiences, I read the transcripts for the experiences of the participants and all statements were given equal weight as an experience of teacher leadership. A separate set of questions for each participant’s second interview was developed from the experiences that arose in their first interview.

Prior to the second interview, an individual e-mail was sent to the participants. This e-mail included specific excerpts and topics from the first interview that I planned on revisiting in the second interview. Participants did not have to prepare in advance but the hope was that this would encourage them to think about these experiences prior to the second interview. In addition, throughout the process of reduction and analysis e-mail and telephone contacts were made to clarify data as required.

To analyze the data, the steps suggested by Creswell (2003) for qualitative data analysis and interpretation were followed. First, Creswell suggested that the data should be organized and prepared for analysis. Protocol writing excerpts were converted to electronic documents, interviews were transcribed and the field notes made during the collection of data were typed up. After the data were organized I read through all the data to “obtain a general sense of the information and to reflect on its overall meaning” (Creswell, p. 191). Transcribing the interviews myself seemed to add to this general understanding of the data. In addition, reading over the interviews with the interviewees was also helpful in understanding the lived descriptions. The third step in qualitative data analysis is a “coding process” (Creswell, p. 192). In this study, data were coded using phenomenological reduction.
The processes of phenomenological reduction include bracketing, horizontalization, clustering the horizons into themes, and then organizing these themes into a textural description (Moustakas, 1994). The bracketing of phenomenological reduction took place prior to the interviews taking place, during the interviews, and during the analysis. It meant that the research was placed into brackets and that everything else was set aside (Moustakas). That is, the entire process of the research was rooted solely on the research questions. At all times during the research, I continually looked to my questions to be sure that I was focused on the goals of the study.

Horizontalization is the second step of phenomenological reduction. In this stage, the interviews were read and segmented into different statements. This was done by highlighting the statements in the transcripts. At this stage, items were not discounted because they were thought to be irrelevant. Instead, all of the statements were seen as having equal value and the entire story, as described by the participant, mattered.

In the third stage of phenomenological reduction, the statements were mined further and those statements that were irrelevant to the research questions and those that overlapped or were repetitive were deleted (Moustakas, 1994). This was done by clustering the horizons into themes. To begin, all of the statements were included as relevant, and all of the repeated statements were included. Then, the themes were condensed and themes irrelevant to the research questions were deleted. In the fourth stage of phenomenological reduction a textural description of each theme related to the phenomenon was developed using the interview data and the protocol writing pieces.

During the phenomenological process of imaginative variation a structural description of how the participants experienced the phenomenon in relation to their individual contexts
(Creswell, 2007) was developed. In this stage of the analysis, I had to establish whether a theme belonged to the phenomenon of teacher leadership essentially or incidentally (van Manen, 1990). Some themes were found to be incidental because they were related to the context in which the teacher leaders were doing their work. The context of school reform was essential to the research questions of this study, so experiences related to the context of the reform initiative were not found to be incidental. However, there were other themes that were found to be incidental. Some experiences were found to be related to the context of a school renovation rather than the phenomenon of teacher leadership. Therefore, this theme was not included in the final description of the phenomenon of teacher leadership in Ford Park Schools.

The final step in the analysis was the preparation of a composite description or synthesis using the structural and textural descriptions. This description presents the essence of the phenomenon (Creswell, 2007, van Manen, 1990) and is presented here for each research question. During this study, I engaged in data analysis conscientiously and with care; I performed peer debriefing, member checks, and consulted with my research advisors to ensure that my analysis of the data was thorough.

The protocol writing data presented in the following section embodies the experiences of selected teacher leaders in Ford Park Schools; it is presented in its pure form, without analysis. Following the protocol writing, the interview data is presented and represents a compilation of the data from the interviews with all three participants. In order to protect the anonymity of the participants, they were not described individually based on demographics such as length of service, gender, type of school, etc. Some reference is made to these demographics in the composite description that follows, but there is not a full description of each interviewee. The
population that the sample was drawn from is small and giving too much information about the individuals or their contexts may compromise their anonymity.

**The Protocol Writings**

Participants who agreed to participate in the protocol writing stage of this study were provided with a writing prompt and a set of instructions (included in Appendix D). When I asked participants to share their thoughts on an experience they had as a teacher leader their responses varied. Some described a single incident or experience. Others reflected on multiple experiences. In some pieces, there were instructions for future leaders or assessments of teacher leadership in the context of the reform initiative occurring at Ford Park Schools. Regardless, each participant approached the writing from their own lived world and these are their stories.

Excerpts from each of the protocol writing pieces are presented here in order to acquaint the reader with the experiences of selected teacher leaders in Ford Park Schools. In all cases, names of individuals, schools, and programs have been changed or omitted to protect the anonymity of participants. In some cases, the protocol pieces included details that would reveal the identity of the participant. To protect the participants, those parts have been left out of this presentation as well. These are the experiences of selected teacher leaders living within a reform initiative.

**Taylor**

I am still unsure of the direction that we should be taking as a school. We have been talking about inquiry learning and student engagement. Inquiry learning fits in nicely with subject areas such as science and history but not so well with other areas such as mathematics and practical and applied arts. I am beginning to understand student engagement, but I am afraid
that teachers will look at engagement as being a special program such as [an academy]. I think it is important that whatever we focus on must impact all students in every classroom. It has to touch all teachers so that we all own it. Most importantly, if I am going to lead something I need to understand it and believe in it.

As I drive...I am listening to a CD of a presentation by Dr. Dylan Wiliams....The presentation clearly defines the impact that good teachers have on students, but more importantly it provides a strategy and a model for professional development that makes sense. Dr. Wiliams presented a model of professional development where teachers work together to improve their teaching. They use formative assessment in their classroom and meet together monthly to talk about what it is that they are doing in their classrooms.

He ends his presentation with these words: “If we can concentrate on doing what is right, rather than what is expedient or easy, unprecedented increases in student achievement, student engagement and teacher satisfaction are within our grasp. The question is whether we have the courage to reach”. I feel inspired! This is exactly where we need to go. I cannot wait to share with the other members of my school team.

William

I would have to say that the [reform initiative] has been exceptionally intriguing. From the outset, we were tasked with the need to change the student and staff mindset (culture) of how we “do school” and the monolith of institutional structures and bureaucratic practices (civilization) that support and paralyze us against change. The challenge has been, is, and always will be to regard the work as a Mindset [sic] evolving and developing continually through constant examination and analysis. This is accomplished through a series of different lenses and perspectives.
Up close, [the initiative] is very much a day to day set of methodological and pedagogical tasks that involve repeated reflection and practice, so that we can adopt and adapt classroom practices that assist/ scaffold staff and students alike to move forward in their learning incrementally.

Adjust the lens to a medium distanced focus, and the project involves planning and supporting longer growth and development; in short, facilitating the timing and establishment of “structures” for staff, so that professional learning can occur in any number of related, but different ways. Examples of this in building would be the establishment of cooperative Teacher Learning groups devoted solely to professional growth, the adjusting transformation of staff meetings and department meetings to include time for professional sharing, and the introduction of autonomous self directed PD, where people work together at their own pace in areas of their own choosing that enhance their own professional growth.

When the lens is moved out to its greatest distance focus, then I have found the need to develop the “big picture/ vision planning model.” While it is true that this involves system wide consideration, the ideas we utilize initiate changes we make or procedures we institute to instil a greater long range view in the minds of all of our stakeholders. For students, this means scaffolding them carefully and systematically into realizing the nature of becoming responsible independent learners who are fully engaged in their own learning. For parents, the people that we have yet to fully involve, we must carefully introduce them to the process of understanding what their student could potentially become as a learner. For many teachers, this means assisting them in realizing that their professional development will not be a short term matter; [this initiative] is neither the “flavour of the month” nor will they be “left alone eventually” as was the practice in
the past. Words like “accountability” and “responsibility” now are commonly used to describe staff professionalism.

Being a [teacher leader] has been a great experience for me when I consider all those I have worked with system wide. However, it has been more than wonderful when I consider just my experiences in my own school. Besides having for the most part a willing, professional and stable (very little transfer in or out) staff, I have been very fortunate from the onset to have been paired with an excellent [teacher leader] colleague who on one hand shares equally in the same visions that we have co-developed, while on the other, thinks in very different ways than I do...While we do our own ventures [within the initiative] and curriculum, we always share what we are doing, discuss deeply and work together to have common staff professional development. I have also been fortunate to have had excellent administrative leadership, support and discourse. There has always been a balanced sense of creative dissonance that has led to a real dynamic that has produced a great cord of tensile strength. It is a crucible of group thinking and the result is a truly collaborative effort and tremendous growth hopefully.

I have found being a [teacher leader] at times to be stressful, almost always immensely rewarding, and always a consistent challenge. It has been very good to have been part of this worthwhile project/ mission.

Riley

As [teacher leaders], we had been given the Daniel Pink book Drive to read. [Teacher leaders] at my school liked it so much we decided to break into groups and talk about it with staff. When it came time to introduce it to my team (department), I explained to them that Pink was a Harvard educated author and speaker who used to be Al Gore’s speechwriter. I told them that his book Drive was all about motivation, and even though it was written mostly for a
business audience, most of what he had to say applied just as well to education, both staff within a school division and students in a school.... I explained to my team that...he had assembled a book full of good practical ideas we could apply in our division. I told them our principal was happy to buy books for those who were interested, and started to show them the [presentation], hoping to follow it with a discussion. Within a few minutes of starting the video, it was clear that some of my audience was not with me (5 out of 7 actually). One got up and said it sounded interesting but he had to go, one toyed with the newspaper and didn't look up at the screen, one fell asleep (literally!!) before the video was over and, most upsetting, two of them talked really loudly to each other, paying no attention to the video, and seemed quite irate. I kept thinking any second the latter 2 would sort it out and pay attention. I assumed that whatever they were bitching [sic] about had nothing to do with the video since neither was known for great attention span in meetings, but I turned out to be quite wrong. As soon as the video stopped, I asked what they thought, and immediately got an earful. What followed was a 5 to 10 minute tirade against Daniel Pink and the fascists who were trying to inflict him on them (Me? [Teacher leaders]?? The division??). No criticism was aimed at the content of the video or book. It was all aimed at 'them', whoever they were, and at Pink....I explained to no avail that even if they didn't think much of the guy, there were useful things in the message. I also told them I thought it was one of the best books I'd read in the past few years, and I read 40 or so books a year. Sadly, things did not end well. Response from other teams mostly involved indifference. We got only one copy of Drive for the library, and to the best of my knowledge nobody has read it. For weeks afterwards I pondered what I had done wrong. Based on other experiences since, amongst the members of my team anything perceived as coming from downtown is generally met with indifference to hostility, depending on the
person. Avoiding this kind of response has been a real challenge. Any time I appear to agree with 'downtown' then I immediately become part of 'them' for many staff.

Lane

As I sit through this PD session I can't help but reflect on my own classroom beliefs and philosophy. I believe these feelings are true of all of us here. I guess this pondering is good sign of effective professional development. Every professional development opportunity should make us think about our current practices. I tend to get hung up on the daunting task that this role of being a teacher leader brings. As a teacher leader, it is my role and responsibility to take what I have learned and, in essence, teach my fellow colleagues. It is an honour to be responsible for the learning of my fellow teachers. I feel very privileged to work in this role. As special as this task is, it is quite daunting. The teachers in my building are relying on me to relay a message. A message that hopefully will force them to reflect on the way they instruct and assess their students. As a teacher leader I often struggle with the fact that I am supposed to be an "expert". It seems very ironic that assuming this role of a teacher leader has allowed my own students to suffer. As I sit in this PD session my students, once again, have to work with a substitute teacher, who is a different substitute teacher from the one that I had when I was at last week’s PD session. When it comes down to implementing what I have learned at my Professional Development sessions I often feel that my students are guinea pigs because it is with them that I implement these new strategies for the first time. As much as my classroom has been changed for the better as a result of being a teacher leader my first priority is always with my fellow teachers. The needs of my colleagues always trump the needs of my own students. This is wrong, I know, but I unfortunately care what my colleagues think of my presentations and teaching more than what my own students think. When I sit and learn in this
PD session I am most often thinking of how I can relay this message to the teachers in my building as opposed to how will this work in my own class. Again, I know this is wrong but I feel my colleagues judge me way more than my own students so it is my colleagues that I need to impress and please.

Jaime

Last year [my teacher leader partner] and I organized a student forum. The idea was to get a group of students that represented different groups and grade levels within the school to attend. The focus of the forum was to be the division priority of [the reform initiative]; this would be followed by an open-mic session for students to air their thoughts and concerns. We...were hopeful that students would show up. We were very pleasantly surprised when the numbers exceeded our initial estimate, which we had originally thought was too high. The group that arrived was also, to some extent, the diverse group we were looking for. It was immediately exciting to know that students were interested in engaging in dialogue about their schooling. [My teacher leader partner] and I lead a brief session introducing the students to the division priority of [the reform initiative], in particular we focused on the dimensions of engagement. The students were broken into four table groups each with a staff member to act as a facilitator for the discussions. The resulting discussions on the questions provided to the students were amazing. Most students very openly shared their opinions. The table conversations were incredible to listen to and in most cases strongly reaffirmed for me the importance of our [system] initiative. After the open-mic session, we asked the students to fill in exit surveys asking about the evening. Student responses were very positive, they enjoyed the chance to be listened to, to engage in meaningful dialogue about their learning, and the future of the school. Perhaps the most surprising outcome of the evening was the feedback we received from the other staff members
present. It turned out that engaging in dialogue with students intensely for over an hour provided a profound staff development opportunity that challenged our teachers to reevaluate [sic] some practices and think deeper about student engagement within their classes. We audio recorded the table sessions at the forum and used sound bites to lead school based professional development throughout the remainder of the school year. The forum was a success; we are planning to run one this year in the next few weeks.

Jesse

One of our goals as a [teacher leader] team has been to try and put learning at the heart of all large staff gatherings. In particular, we have slowly been trying to change the way staff meetings look and operate. [At one] staff meeting we had two separate things to discuss with staff.

…Staff meeting day. There has been a misunderstanding between the [teacher leaders] and our Staff President. We asked that our two items be separate on the agenda to spread out our “face time” at the front of the staff, and to create a bit of a distinction between the two activities. Somehow this translated into giving us a 25 minute block of time at the very end of the staff meeting. As per usual, other agenda items took far longer than they had asked for on the agenda. By the time we were supposed to talk to the staff, staff was starting to mentally check out of the meeting. I try not to let things out of my control stress me too much, but it is difficult to lead staff through different learning activities when it’s fairly clear that a large majority wish they were elsewhere. On the fly we edited both mini-activities in order to try and cut down on how much time we spent with staff. Staff were extremely resentful of us using staff meeting time to model an activity they were going to do with their students and that we were “doing PD” on a non-PD day. We were extremely respectful of people’s time, and actually finished both
activities in less time than we’d originally asked for. However, since we were the end of the agenda, it was “our fault” the meeting ran late. I left concerned that I’d damaged relationships with staff and they would see it as me personally who was responsible for both the information presented and for infringing on their time. I left feeling really frustrated that many of our staff have such a fixed mindset on what is staff meeting material and what is not. Situations like this make me feel very frustrated in how rigid staff can be and how resistant they can be to change.

Eve

When I first came to [this school] I established some great friendships with the ladies. Although those friendships are still there, I have noticed a change in how they treat me now that I am a [teacher leader]. I shared my feelings with a close friend at the school who said that she felt “that just goes along with the territory” as teachers know that I have the “ear” of the administrator and therefore they would tend to be more guarded with their discussions. That really got me thinking. I started to question if this new role was perceived as an administrative role more than a collaborative teacher leader role.

Since taking on my role as [teacher leader] I find I have even less time to go out for lunch with my peers. What is even more rare is being asked. I sometimes felt isolated and sad about that. So when I had a friend say that we were going to join the ladies for lunch I thought “Great, I will have a chance to reconnect with them.” I was happy to go.

I never intended on sharing my feeling with my friends, but when the opportunity arose I felt it was important that I share my frustrations. The discussion got started when one of the ladies started talking about her husband’s frustrations with staff as he is a [teacher leaders] in the school at which he teaches. She then asked how I was doing with the role and from there I started to openly and frankly discuss how difficult it can be in terms of feeling socially isolated
from the staff....The more I talked I felt a weight had been lifted as I shared how I understood people are a bit more cautious with the [teacher leaders]. When I asked them why this is, their answers did not shock me as I had already come to the same conclusions on my own. What they said is that the role of a [teacher leader] is so new, that many do not fully understand what the role entails. They are not sure if we are now more administration or are we fellow teachers who are learning and leading along with them. I felt a bit disheartened when they confirmed it is a bit of an “us” versus “them” mentality. As [teacher leaders] spend a lot of time behind closed doors with administration, I could understand why they said what they said. It is true that this role does put [teacher leaders] in the position of knowing more about the workings of the school, staff issues and the school politics.

By the time lunch had ended I felt good as I had a chance to connect with them and to remind them that I am still their friend and that I am still a professional. It also was a way for them to know how it hurts to not be included. On the drive back to the school my friend said “Wow, I am surprised you shared that with them so easily”. She went on to say that it was appropriate and it helped “clear the air”. I felt better about taking a chance and putting my feelings out there. I trust these women and I am happy to say that they now understand the position I am in. Interesting enough I shared this story the same day with our Principal [who then] said “Welcome to my world”. Although I have no plans on becoming an administrator, I still felt frustrated as this is not what I “signed up for” nor did I realize this is what could inadvertently happen to a [teacher leader] once they took on the role.

**Thomas**

My partner and I were unveiling some of Ken O’Connor’s controversial ideas on grading and reporting practices to our whole school staff. We came to the part about not including zeros
in grade calculation. Since the philosophies tended to resonate well with me, and made sense to me, I was fully prepared to proceed to the next topic. Not so. There was an eruption of comments from the staff. People expressed complete disbelief, and took the opportunity to become, in some cases, antagonistic. My partner and I tried to calm the group down, and began taking individual questions. We did our utmost to reveal the underlying philosophies behind some of the O’Connor points, and I felt that we did a good job at providing solid rationales for each. However, the majority of the group was in a mind-state that did not allow them to entertain our ideas with any level of rational understanding. Personally, I felt without credibility or respect in that moment, as certain members of the crowd grew more and more vocal, and more antagonistic. One colleague in particular turned red in the face, raised his voice, and started to berate our ideas. He actually went as far as to say that the ideas threatened to make obsolete the entire teaching profession, and that they would make a culture of mediocrity that began producing slacker doctors and lawyers, all contributing to a low-functioning society. I felt, at that moment, that there was a 15% chance of him getting violent. Clearly, he and some of the others were having an emotional, rather than a logical-professional response to the ideas. Afterward, my partner and I had several colleagues approach us and tell us that they appreciated the work that we were doing, and that they agreed with the O’Connor points. Unfortunately, none of these people had been vocal during the group discussion, and so could do little to quell the emotions we were experiencing. I personally felt very defeated and completely de-motivated. It wasn’t until after much reflection that I started to feel better about getting up in front of the staff again. I realized that teachers are, by nature, idiosyncratic, and derive their professional identities, more so than in many professions, from their autonomy and personally preferred practices. The ideas that my partner and I were sharing threatened that autonomy and teacher
identity. The response was understandable. Later, after much digestion and exposure to new voices with the same message, our staff came to generally accept the philosophies behind the O’Connor ideas as solid ones. And again, I feel motivated and confident in front of staff.

Jordan

My experience has taken on different dimensions as I have worked as a teacher leader within the school…[with other teacher leaders and administrators].

The role has been one of most interesting and challenging roles I have lead over the course of my career. My…career is one of many diverse and challenging experiences. Early on I predicted we would be opening a Pandora’s Box of emotional reactions, and it certainly has been the case. I under estimated how difficult leading transformative change can be as the observable evidence of progress is fleeting at times and requires a different way of observing and sensing change.

…When we began with student perspectives on learning and visioning for schools, I was amazed that many of my colleagues felt insulted and discouraged. It had seemed to me an uplifting experience where young people had insights and enthusiasm to contribute ideas to how schooling could be more effective. I was thankful many times that I worked with [others] whom I trusted and found energy in working with. Our administration was excited and we began exploring ideas. We worked routinely together and it felt like we were pulling together. I was able to lead intuitively and from a role where I was respected and recognized. I loved the opportunity to learn from numerous individuals. It was tiring but fulfilling work.

[After this] our school team was struggling…it has been [challenging]… We have had to pull hard and lead carefully and subtly. I often consider that I do far more facilitating among staff and administration. There have been very discouraging times, where I have wondered
about the reaction and behaviors of colleagues…. This role has required a thick skin, creativity, and a philosophical outlook. It has been important not to personalize the reactions of colleagues who become frustrated by the lack of clear direction and progress at the system level. We are working toward next year’s planning, slowly envisioning the role of staff coordinators and administrative contributions. These are major changes of asking why we do what we do and how it is connected to supporting student engagement in learning. I still feel we are in our infancy and I am amazed we can not [sic] run faster together. Sometimes I wonder if I could do more in a different role, as I feel like the “middle man” or “counsel” helping others work toward understanding how to lead a community.

**Casey**

I have been a teacher leader in a variety of capacities over the years – a technology leader, a department head, a learning coordinator, chaired provincial committees etc. I don’t remember being more nervous than I was in my first month as a [teacher leader].

[The facilitator] started by asking [what our reform initiative was]. I had copied the goal of a piece of paper my Principal had when he offered me the job. I applied because he suggested that I might want to do it, and I said yes because I trusted his judgement that it was “my kind of thing.” I know now that he was more than right, but I had no idea what [the reform initiative] was. Of course, I know that neither [my principal nor the facilitator] really knew, but at the time I felt hopeless.

When [he] asked [the question], I subtly moved my paper to the front and scanned the words in the goal so I could remember them. But I wasn’t really focused on the answer, I was focused on my own feelings of trepidation. I am a person who is always over-prepared for everything so that there is always a contingency plan. The ambiguity of [the reform initiative]
made that impossible in those first weeks, and as I listened to [the facilitator], an image leapt to mind.

The summer that I was 12, my sister and I went to stay with an aunt in Toronto for two weeks. We had our spending money and transit passes and we were supposed to go and see any sites we were interested in while my aunt was at work. After three days of me getting to pick where we went, my sister declared that ROM was boring and we were going to the zoo. We were three transfers (subway and bus) into our journey before I realized she didn’t actually know how to get there. I remember feeling a really strange combination of a feeling of adventure and a feeling of fear. [My sister] asked me, “What is the worst thing that can happen? We just keep taking the bus?” That is exactly how I felt about [the reform initiative]. Like I was in a big city, headed to directions unknown on a tour lead by someone who figured the worst thing that could happen was the status quo.

Part way through the meeting, I had a chance to talk to [my colleagues]...I had enjoyed the philosophical discussion of the day, but was still really worried about introducing [the reform initiative] to the staff. What would I say it was? How would I explain my role, or theirs for that matter?

Leading [the reform initiative] continues to feel this way to me, regardless of what role I play. I have come to realize that transformative change always feels a little like being lost, especially when you are heading somewhere exciting. It’s also true that the lack of definition has been a strength for me when I thought it wouldn’t be.

**Devin**

The [teacher leader] journey has brought emotions. In the beginning, there was joy that our system would finally tackle an issue that school, as it existed, was not working for a lot of
people. There was apprehension that the process could be lost in the debates of academia. As the first step on the journey was taken by looking at Inquiry learning, there was frustration that it did not seem to fit into a big picture framework for understanding where [the reform initiative] was going.

Two things provided relief and understanding for a big picture framework. The definition of Engagement...and the introductions to the philosophies, beliefs and practices of Anne Davies' Assessment For Learning (AFL) techniques.

[At one point] the goal was to take the AFL philosophy to the staff at large, and provide them with some of the techniques and practices (tools) of AFL. A large frustration with this was that up until that year [some staff] were missing all the P.D. sessions. A difficult task was for me to inform our administration that by allowing people to go get equipment, or carry out extra curricular activities, we [teacher leaders] felt that [our administrator] was sending the message that P.D. was not a priority. A gratification occurred…when [our administrator] realized this and spoke to staff who missed P.D. sessions. [Our administrator] encouraged them to attend as P.D. was important.

The year long process on changing philosophies and processes met with mixed results. Some of the staff bought in. They embraced the philosophy behind AFL and tried its processes. Another group were open to discussing and reflecting on the changes. They would try some things, but often felt that they did not work well or were not comfortable with them yet. A third group would best be classified as resisters. They felt this was just another passing fad and if they avoided it, or "just ducked" it would soon pass. It was very frustrating for us as [teacher leaders] to see that there were resisters. The changes to AFL and [the reform initiative] seemed to be such common sense to both of us, as [teacher leaders].
…One thing that has been very hard for the [teacher leaders] in our collegiate has been for the most part the non involvement or non in depth involvement of administration in the planning of [the reform initiative] P.D. The administration has been supportive, participated and facilitated when asked, and wanted to be in the know relative to what has been planned. Our administration has not been deeply involved in reading, discussion or planning. It has left me in particular feeling frustrated because the literature reviews of change theory say that the principal, in particular, is the leader of change.

Something that has been very reassuring for me and assisted us in the directions we have taken in our…journey has been collaboration with [colleagues in other buildings]….That discussion, and in some cases direction has given support to the plans in our building. The collaboration…has provided reassurance, a sounding board, clarification, focus points, insights, but most of all a reaffirmation we are not on the journey alone. There is someone who can read and interpret the map for this journey.

The last emotion of being a [teacher leader] has been a feeling of being alone, while carrying the burden of bringing about educational change….I guess the bottom line of emotion of this is that I have felt pretty much alone in undertaking the [teacher leader] tasks, except for the time with [a specific teacher leader partner]. The support from [colleagues and the system initiative] team downtown have also greatly helped this feeling of isolation. Yet in our building the isolation feeling is often prevalent.

Jane

It’s interesting being a teacher leader. I have a love hate relationship with being a leader. I like new ideas and initiatives and usually I can see the merit in them. But sometimes I dread being the leader when it comes to working with staff. As soon as I see the group I will work with
I know who will be helpful and who will not. Usually I am dead on but occasionally I am delightfully surprised. One time I was taken completely by surprise when an administrator in my group was really negative – who would think???

Another thing about being a leader is once you’re in it’s like you’re in for life. I think the staff grow weary and even resentful of seeing the same leaders all the time and the really negative ones even see you as on the admin team in some respects. Speaking of admin, I once went to a session for administrators at an evaluation conference. I thought it would be neat to see what they do. I figured could sit quietly in the back but no – everyone had to introduce themselves so I had to “fess up”. They were delighted to pick my brains about leadership. I thought it was interesting that they acknowledged that PD is a window: for some teachers the window is only open a crack and for others it is wide open. They admitted that usually they pick teachers with windows wide open to lead PD and then gear PD to those whose windows are only part way open. They were interested to hear that I was tired of always being one of the leaders and agreed there wasn’t much PD for people with wide open windows.

A good thing about being a teacher leader is I learned a lot about working with people. I learned to be respectful of all voices – well, to appear respectful would probably be more honest. I learned to ask myself why certain people were negative. I learned how to work with people and encourage them to engage where it’s right for them. I learned not to get angry. I learned not to take negativity personally. I grew a thicker skin.

A highlight of my recent experience as [teacher leader] has been the opportunity to meet with [teacher leaders] from across the system. At last a thoughtful, planned process (as opposed to the typical last minute scramble of the school based PD committee). I really liked working with people from across the system instead of in isolation. I very much appreciated the
opportunity to speak openly and honestly about the process with the downtown representatives present. I have learned a lot from watching them deal with honest and important criticism and take it well. I appreciated and learned from their honesty and expert advice.

Even so, when the negative voices start to warm up during PD my stomach clenches just the way it [used to].

**Participant Selection: From Protocol Writings to Phenomenological Interviews**

To select participants for the phenomenological interviews teacher leaders who used the senses in the description of their experiences and limited analysis of their experiences (van Manen, 1990) in their protocol writing were identified. It was the depth of their experiences and their predisposition to reflecting on these experiences that set these pieces apart from those that were an account or a telling of an event. A pool of six potential participants was selected. Lane, Devin and Jordan were the first three invited to participate in the in-depth interviews. All three agreed to participate. Although the main purpose of the protocol writing was to select participants, an additional purpose was to help me in developing the questions for the interview portion of the study. With my research advisors, the interview questions were fine-tuned prior to the pilot interviews taking place. A third purpose of the protocol writing was to support the presentation and discussion of the data. The writings have been presented authentically here. The protocol writings were not analyzed for themes. However, a reading of the protocol writing data revealed some interesting things that, upon reflection, foretold the main part of my research, the interviews. After completing my data collection and analysis I returned to the protocol writing pieces. Now, I see that many of the experiences inherent in these pieces foreshadowed the interview data. The following sections of this chapter portray the phenomenon of selected
teacher leaders’ experiences and disclose how these teacher leaders made sense of their experiences.

**Presentation and Analysis of Teacher Leader Experiences**

**within a High School Reform Initiative**

The three participants in this study were Lane, Devin and Jordan and they all had very different qualities. One had worked with a lot of administrators. One had frustrations with administrators. One was eager to begin a career as an administrator. Each of the participants had very different contexts in their buildings. One was in a community school. One experienced changes in administration. One experienced changes in school climate. Each of the participants had a different teaching background: One taught in the humanities, one taught in the realm of mathematics and science, and one had experience teaching multiple subjects. Despite their differences, all three participants shared the experience of formal teacher leadership within a high school reform initiative. Their experiences are presented in the sections that follow.

The data collected from the interviews revealed similarities in the three participants’ experiences. Initially, these similarities were reduced phenomenologically into 21 themes. The process of imaginative variation revealed that some of the themes found were incidental themes (van Manen, 1990) that were related to the teacher leader’s particular environment and were not essential to the phenomenon of teacher leadership. After phenomenological reduction and imaginative variation were completed the initial 21 themes were condensed into the following five overarching themes: (a) grappling with teacher leadership identity; (b) facing the uncertainties of sustaining the reform initiative; (c) negotiating the tensions between management and leadership; (d) experiencing challenges of leading; and (e) feeling the
empowerment of success. Participant experiences pertaining to each of these five primary areas are elaborated on in the following sections.

**Grappling with Teacher Leadership Identity**

The teacher leaders in Ford Park Schools had experiences that seemed to be connected to their self image. Although I did not make self image the direct focus of the interviews I found it to be a recurrent theme in the experience of these teacher leaders. Participants often made reference to their identity and their image of themselves as a leader. The data presented itself in this theme in three ways: (a) concerns with self image as a formal teacher leader; (b) desire for credibility and influence as a leader; and (c) negotiating personal views and identity as a leader. Each of these subthemes will be examined in this section.

**Concerns with self image as a formal teacher leader.** The data revealed that the experience of teacher leadership was filled with thoughts and perceptions about the role. When participants described how they came to be a teacher leader, there seemed to be two motivations: encouragement from others to take on the role and belief in one’s ability to take on the role. These contrasts to taking on the role could be attributed to differences in career stage or differences in understanding of self. Jordan had experience as a teacher leader in leading professional development with staff. She described how this eased her transition to the new formal teacher leader role:

I have been on staff for some time. I have been leading professional learning in a number of ways. I already had a wide variety of relationships with staff. I was probably pretty well situated to take on that role and I felt comfortable doing that. In fact, I didn’t really feel a lot of anxiety doing that. I was just really excited. Extremely excited.
Jordan saw herself as a leader on staff prior to the formal designation. Her comfort with leading and the relationships she had already built with staff made the transition smooth. For Devin, the transition was more difficult:

For the most part, I’m not from a realm of academia at all. But then, the idea came forward, and our vice-principal sort of approached me and said “would you think about this”? My initial thought was no that will be…I think my term was the eggheads…I remember after the first meeting and I was like what the hell? What am I doing here? I am more...pragmatic and practical. I thought some of the discussion at the first [meeting] was quite philosophical and ivory towerish [sic] and I was kind of thinking, oh god, what have I got myself into…a kind of an uncertainty that I belong, that I really fit. Am I really the right [person] to be doing this?

Devin was anxious about what he perceived to be the philosophical component of the new role. He thought of himself as practical and was worried that only the theoretical were suited for the role of teacher leader.

All three of the participants described being encouraged to take on the role of formal teacher leader. In all cases, administrators were doing the prompting. They observed:

- Anyway, it was basically [my vice-principal] convincing me that I had credibility with staff, that I had enough experience, and that I could be one who maybe would be able to bring about some type of change (Devin, personal communication, Friday, May 14, 2010).

- Certainly, I was encouraged. Many times. When it didn’t come fast enough [my administrators] were concerned…which you know, that is important…to know that
someone believes you can do that job (Jordan, personal communication, Wednesday, May 19, 2010).

- It was the administrators that sort of shoulder tapped I guess about taking on the opportunity of being a [teacher] leader. They described what it was and what it would entail and basically asked if I wanted to have the role which I accepted with open arms (Lane, personal communication, Monday, May 17, 2010).

It seems for these participants that the experience of the formal teacher leader role began at the suggestion of (or with the blessing of) administration. This also became clear during our second interview when Devin described how he was not involved in the decision making with regard to who the next teacher leader would be in his building when a role was vacated: “Even last year when we had a couple of applicants for the position, [my principal] made it clear that it wasn’t my choice”.

Once the formal role was taken on there seemed to be an increase in concern with self image and how the teacher leader felt about the new role. Lane described it as a feeling of discomfort. When I asked him to describe this feeling he responded in this way:

So, just that whole aspect of … getting up in front of your colleagues and teaching and facilitating…it was uncomfortable for that reason…because it was so new. Then you add to it my uncomfortableness with the material that I was having to facilitate through….added to that…so yeah, it was a feeling of uncomfortableness, of nervousness prior to doing that. Like anything, it lessened as I became more comfortable being able to speak in front of my staff.
It seemed that at the outset, both Lane and Devin were concerned with their self image and whether or not they were right for the teacher leader role. But, as the initiative went on, they both became more comfortable in their new role.

As these teacher leaders assumed a formal role of leadership their experiences varied. There was excitement, uncertainty, discomfort and comfort. Regardless of the feelings experienced (which may depend on the experience the teacher leader brings) there seemed to be a definite shift in role. These participants seemed to take on a new persona once they took on the new role. They were not yet administrators but they were no longer teachers.

**Desire for credibility and influence.** All three participants were concerned with being viewed as credible. During our interviews, they often alluded to questioning how they were viewed by their colleagues. There were experiences that made them feel credible such as encouragement from staff and support from administration. However there were also experiences that made them feel that they lacked credibility such as feeling they were not expert enough and were feeling disrespected by staff. Devin was encouraged to apply for the teacher leader role by one of his administrators who felt Devin had credibility with the staff. I asked him about this credibility and whether it was helpful during his experience as a teacher leader. This was his response:

Yeah, actually, probably. I don’t know if I would have recognized it as a measurable credibility. Often when I spoke, on whatever, everybody kind of listen[ed] and would follow. That didn’t just happen though, that kind of came because I’m old and I’ve been here a long time. And maybe [my administrator] saw something there…

... The hallway lowdown on me is probably… ‘not outstanding but he is good…he’s fun…he likes kids’. I’ve never heard anybody use any of the gigantic inflammatory
remarks…but sort of ‘yeah [Devin] is good…yeah you’ll have fun in that class’. So, every once and a while you will get bits and pieces of oh you know a couple of kids were talking about you in class. So, it is amazing what the credibility from some of our clientele also builds currency with the staff too. I’m not completely sure where it comes from. That would be a good question to ask [my administrator]. If I [was in that position], I don’t know if I would have picked me…I really don’t.

He acknowledged that he had some credibility with the staff. However, he also felt that his position as teacher leader was a powerless role that left him feeling less credible and trustworthy. It seemed that he felt he had credibility as a teacher, but as a teacher leader there was a different experience:

I mean you look at change theory you know…the principal is the one with the authority. I may be a voice speaking at some P.D. but, what credibility do I have? And in fact our role is to try and bring about change and introduce them to it and to support them in the change…but in some places where you need firmness, it just feels like we don’t have that behind us.

Devin felt that because he was trying to invoke deep change in his colleagues, he was unable to do that in his role as teacher leader. He felt he did not have credibility because he did not have authority. He also described his sense of credibility diminishing the longer he stayed on as a teacher leader:

I’m trying to get a read on staff as to whether I have burned up that credibility? I know for some…well, I shouldn’t say that…my belief would be that with some, yeah, I’ve burned it up.
What I’m doing now is I’ve asked three staff members that I trust and that travel in different circles to go and smell the wind. Sniff…smell the air…is my voice tired? Is my credibility gone? Have I burnt up my currency? Do we need a different voice a different way? As of yet, I haven’t got much back.

Devin had credibility as a teacher in the building and yet he questioned whether or not he had credibility as a leader. It seems that he felt confident about his identity as a teacher, but that he was less confident about his leadership identity.

During my interviews with Jordan she did not worry about her own credibility in the school. She felt secure based on the feedback she got from her colleagues. However, she did describe an experience where she witnessed other teacher leaders being scrutinized and felt that their credibility was diminished.

The [teacher leaders] felt very convinced philosophically that they were right on the money and that they were doing what they should. I kept thinking…oh, horrible mistake…you do not understand that these things are about more than that. That is what is so interesting. I mean huge movements aren’t always founded on thoughtful well-developed ideals. It can be on some charismatic little quirk that comes along at the right time and they didn’t perceive the power of that. That was really unfortunate and they never perceived that individual’s power in certain ways …and even her intuitiveness to look after a certain aspect…they underestimated it and as a result I think it came to undermine them.

Jordan’s experience addressed how credibility with staff was not earned solely by a designation as a formal leader. Jordan witnessed other teacher leaders losing influence on staff. Jordan felt that their credibility was diminished because they were not careful in how they presented new
material and that their credibility suffered because there was a different charismatic person that the staff felt was perhaps more trustworthy. She believed that the teacher leaders did not think about the importance of how they might be perceived by their colleagues and that may have diminished their credibility.

Lane was also concerned with his credibility. He considered presenting material related to the reform initiative to staff to be a “daunting” task. During one interview he told me: “As a teacher leader I often struggle with the fact that I am supposed to be an "expert"”. For Lane, concerns with credibility were focused around making sure that he appeared credible in front of the staff:

Being a teacher leader, I know I care way more about the teaching I do in front of my own staff than the teaching I do with my own students. I don’t know if that is good or bad, maybe it is normal, I’m not sure. But, I seem to care way more what my colleagues think of my teaching than what my own students think of my classroom teaching. So, I put a lot more into the teaching of my own colleagues through professional development of whatever that is going to be. I really want to make sure that is well done.

During the interviews, Lane did not report feeling discredited by his colleagues. This may have been because he was careful to present himself in a way that contributed to his feeling credible. This is in contrast to the experience Jordan described where teacher leaders did not think about how they may be perceived by staff.

**Negotiating personal views and identity as a leader.** As the participants described their experiences it became evident that their personal views of leadership and their own identity as a leader were intertwined with their experiences. As they answered questions they alluded to the reciprocal nature of identity and teacher leader experiences. Their experiences revealed that
sometimes the participants’ views on leadership directed and influenced their experiences.

Conversely, sometimes their experiences influenced and shaped their leadership identity. Their views on leadership were couched in their experiences. This is evident in Jordan’s comment: “I am [a] socially motivated individual that looks to connect and bring people in”. Jordan reflected on her own style of leadership, the leadership styles of others and how that influenced her interpretation of what others did and how it impacted her decisions on how to act:

I guess what is amazing is how few people feel secure in leading with their colleagues.

We have an amazing paranoia about doing that. I am really interested in the way that many of our current learning coordinators think about that work and feel uncomfortable. That has been a major challenge…understanding leadership, understanding facilitation with your colleagues, and understanding what the work is about…and feeling confident and knowledgeable to share that.

Jordan’s thoughts on leadership impacted her experience because she was struck by how others reacted to leading. She identified that there is a paranoia about leading colleagues, and yet she does not seem to share this paranoia about leading. Instead, she seems secure in her leadership.

Lane was concerned that staff may have been questioning the extra prep time he received in his role as teacher leader. In fact, he initially told his administrators he would like to take on the role without the extra prep time. In explaining to me why he was worried about this he referred to his personality and what is important to him when he is leading.

And I think it is part of my personality. I care what other people think and I wanted to please I guess and make sure that other people were happy with what I was doing. So, yes [I told my administrators] I don’t want this prep and all that. Now, in retrospect, thank god that I had a prep and there is no way that I would be able to function without it.
Could staff in this building be questioning the prep? Absolutely. In fact, I know they are. But I guess I have since matured in that role and I am fine with it because I have used it wisely.

Lane’s desire to please those around him and avoid conflict resonates in his comments. His growth and confidence as a leader is also apparent. As a leader, it was important to Lane that the people he led were content with his performance. After the experiences of teacher leadership this was still important to him. However, his experiences have also developed his leadership identity; it was not only important to him that people think he was doing well, but he was also confident that he was doing things in the right way. There was a change in the way he viewed leadership.

**Facing the Uncertainties of Sustaining the Reform Initiative**

The reform initiative of Ford Park Schools experienced uncertainties of sustainability and succession as do many school reform initiatives (Fullan, 2009; Hargreaves & Fink, 2006, Reeves, 2009). The first theme in this section identified how teacher leaders were identified to lead—by their administrators. Both Jordan and Devin referred to being asked or nudged to continue on as a teacher leader throughout their experience with administrators asking them to reapply. Both Jordan and Devin were concerned with the sustainability of the initiative and wondered who would be their successors and how the message of the reform would be carried on. These concerns are revealed in Jordan’s statement:

You just realize change, especially this kind of change is not easy…and it is extremely slow. It is extremely slow, especially if you like to see things move along. So, then you wonder how long people can stay leading in those contexts? And then, what happens when it rolls over to someone…and then you see it kind of dip back and then how do you
get that momentum again? So, I really wonder how the cycling is going to work and how it is going to play out over time. It is really fascinating.

This statement suggests that sustaining the reform initiative was deeply important to Jordan; she had a vested interest in the philosophy of the reform and had lived within it deeply. It also reveals that there are the sustainability of the initiative is uncertain. The data from the interviews revealed that there were difficulties and threats to sustaining the reform initiative and there were positive forces supporting and sustaining the reform initiative.

There were a number of tensions and frustrations that arose for the participants which specifically threatened sustaining the work of teacher leaders in the reform. Devin seemed particularly focused on a lack of support from administration as a challenge in sustaining reform:

The strength of leadership in the whole process is important…and it is interesting, Anne Davies talked to me…in second year. We got to spend a lunch together. We were talking about the process of systemic change, and she said to me you will probably know by the end of this year and certainly by the end of the third year if [the reform initiative] is going to work. It will really depend on your administrators. And yes, as I look at it. Have we made a lot of gains? Well, yeah but to me the place where most of the work still needs to be done is with administrators. There is still that management mindset as opposed to a learning mindset.

Devin’s concern is that the instructional leadership of administrators is imperative if change is to occur. His comments suggest that if administrators remain managers instead of instructional leaders, change becomes difficult and the reform initiative will be difficult to sustain.

One other perceived threat to the sustainability of teacher leaders’ work was that some teacher leaders might be taking on the role primarily to advance themselves throughout the
organization. During the interviews, the participants were concerned that this might make reform difficult to sustain. Teacher leaders who have taken on the role as a way to pursue administration may not be as vested in the philosophy of the reform initiative. During an interview with Lane, this challenge came to the surface:

*Interviewer*: You have talked about leadership a lot. You know, leading other teachers seems to be a focus of where you have been going. So I am just wondering how you see the role as a leader preparing you for different things in your career.

Yeah, that is kind of a conversation that has been had around here too. For me personally and now sort of pursuing administration – a lot. I know a focus is on instructional leadership…and what a great role to have here as [teacher leader] to help me out with that. I know in talking to vice principals in our system they say you are so fortunate to have this and moving to that next step…to be part of the initial conversation…and some principals really aren’t up on the whole [system initiative] conversation. But, now hopefully moving in the future to an administrative position I will be up on that conversation. I know at times administrators are at these sessions…and I hope to be as well and continue on with the professional development and the learning. So that is me personally. Now, as a teacher leader do you have to move onto administration? Absolutely not. But I guess it is up to each person....This role of [teacher leader] should not be a training ground. If someone does not have aspirations of moving into administration they still should be a teacher leader…it does not have to be [like] that but I think [experience as a teacher leader] is a nice thing to have [when you are going to be an administrator].
Lane’s comments revealed his desire to move into an administrative role. He spoke about aspects of the reform initiative such as the professional development and understanding the language of the reform as being helpful in attaining an administrative position. This is in contrast to Jordan and Devin, who saw the professional development opportunities primarily as a means to reform their schools. This difference in orientation towards the reform initiative is evident in Devin’s comments about one of his teacher leader colleagues:

I do think that…in the situations where I have had to go and challenge [administration]…some of the younger [teacher leaders] weren’t comfortable with that. [They] just [weren’t]. In part because of personality but [they] also ha[ve] a career and [were] going to ascend upwards…[they] doesn’t want to piss anybody off if I can use that terminology. For me it is more about what do I [emphasis added] think is right. I’m not going anywhere inside this system so I don’t need to worry about being upwardly mobile.

It seemed that some teacher leaders were doing the work to advance the reform and others were also using the work to help advance through the organization. Sustaining the reform initiative may be more difficult because the power of teacher leadership may be diminished if those in the formal teacher leader roles are seen as potential administrators.

In their relating of their experiences, the participants revealed that there are a number of positive forces that were sustaining their work and sustaining the reform initiative. These positive forces included support from colleagues and supportive structures set up by the school division or the administrators.

All three of the teacher leaders described the partnership with their teacher leader partner and how that relationship was important in allowing them to work through their thinking and feel less isolated. Jordan described the positive force of the support from other teacher leaders:
I guess we just valued one another. That is so key. When you are doing hard work and you are stepping out, you need to know that you are valued and you need to know where your place in the work is.

These comments reveal that the support of colleagues energized Jordan, sustaining her work within the reform initiative.

Some of the structures and processes that were developed by Ford Park Schools central office administration also proved to be a positive force in sustaining the work of teacher leaders. In particular, allotting funds so that there could be at least two teacher leaders in each collegiate, offering professional development, and encouraging administrators to develop the timetable to best support the work of the teacher leaders. Administrators in the collegiate supported the work of teacher leaders by creating the timetable so that teacher leaders had time together to work. Lane commented on how some of these supports impacted his work: “the other [teacher leader] and myself [sic] have a common prep which we find to be essential”. He goes on to speak about the support from the school division:

It is essential…and quite fortunate too to have two [teacher leaders] in a building. It would be quite onerous and stressful to be the only [teacher leader] in a building. It is nice to sort of share that experience.

Ford Park School’s planning for the initiative proved to be a positive force in sustaining it. All three of the participants spoke about how the professional learning and resources they were provided with were essential in helping them to lead.

**Negotiating the Tensions between Management and Instructional Leadership**

Throughout the interviews participants seemed to refer to two distinct roles of leadership: Instructional and managerial. As the participants described their experiences, the tension
between management and instructional leadership was apparent. The data presented itself in this theme in two ways: Concerns with administrators’ predisposition towards management and frustration with the bureaucracy of management interfering with instructional leadership. Both of these subthemes will be examined in this section.

**Concerns with administrators’ predisposition toward management.** For Devin and Jordan, there were frustrations with administrators who seemed to adopt a managerial approach. Devin felt that the tendency toward the managerial was not exclusively a matter of context and time pressure. He observed that a number of the leaders in Ford Park Schools were more comfortable in the management paradigm:

> The paradigm that education used for years and years and years was a managerial paradigm. And, if you look at [this division’s] administration…university athletes and people from Phys. Ed.…they have confidence, public speaking skills, organizational skills that come with that athletic background and that is the managerial side of running a building…but managers all they had to do was make sure all the teams were there, all the classrooms were full, that they didn’t have fights. It wasn’t about how do we make more kids successful in their learning. Now, having said that, I am painting them all with the same brush. That is not necessarily true…there are some that certainly had those thoughts.

He did however acknowledge the workload influence on administrator managerial responsibilities:

> ... The other thing though with our building is that we have so many other plates to juggle...there are other things that are more important. I mean, we understand that. So, how much time can they even devote to a learning agenda? They come from a
managerial background and the tasks on the managerial plate are so much greater that it is only probably understandable that this whole learning side...it is hard.

In Devin’s experiences there were frustrations with administrators being from this management paradigm. However, he recognized why they felt more comfortable there. Jordan made a similar rationalization for why there was a lack of instructional leadership in her building: “they stick with the managerial because that is what they know and it is more comfortable. It is easier”.

Conversely, Lane’s experience with administration was that his administrators were deeply involved with leading the reform initiative.

I think of administrative support. Very lucky here in that we have had support and our administrators have been on the learning agenda and want to be part of it as opposed to just throwing it at the [teacher leaders] which has happened in other buildings...[based on my conversations] with colleagues.

During our interviews Lane described several projects related to the reform initiative that he led alongside his administrators. He also described meeting with them weekly. This was something that both Devin and Jordan wished to be happening in their buildings.

Devin witnessed and discussed other teacher leader colleagues who worked in buildings with administrators whom he felt were instructional leaders. He felt that these buildings where there was an administrator who he perceived as an instructional leader were making the most progress. His comments illustrate his desire for more instructional leadership from administration:

I think probably our greatest frustration is looking at the model and what is occurring in one or two other collegiates where administration is so completely immersed in the model and really leading it. As opposed to it is on our lap, but I want to look good. So,
you do it all, and then I will check it over to see if I look good. Or, we look good. That part has been frustrating. I think in the buildings where the admin have taken an active role have got it. It is all; I’m a part of if…I’m the educational leader here. These are my teacher leaders, but I’m lead learner. I think with that not occurring here…and that is not to say that we haven’t had some support…the involvement…it doesn’t happen. We don’t meet regularly for planning. I know they do in other collegiates – weekly. They are all involved in the planning. So, what are we doing? Okay. So how does that look? Any questions about it? Have you thought about this? Here, much more minimal. Again, in our building there are lots of other duties and responsibilities as well for a principal and for the admin team.

Devin did not blame his administrators for their lack of instructional leadership. He recognized that it was difficult to be an instructional leader because of the pull of managerial tasks. Jordan also recognized that the managerial interfered with instructional leadership. She said, “the reality is in some places the management weight is extremely heavy” and that administrators do not “get more time to turn their attention to the learning. They are still going a mile a minute trying to manage a building”. Jordan blamed the managerial weight (as she termed it) as the reason why some administrators were not as deeply involved in the reform initiative:

If an admin team doesn’t have enough resources and support so that they are functioning and working well collaboratively, they rarely can attend to the learning agenda, especially if it isn’t their first inclination….So I understand why some administrators just tune it out and put it on a shelf and think let someone else run after it and we will see how they do. They have learned that you can’t do it all and you can’t do it all really well…and sometimes you get burned when you step up first. You just do.
Both Jordan’s and Devin’s comments suggest that there were a number of administrators operating as managers instead of instructional leaders. Lane’s experience seemed to validate Devin’s belief that there were administrators in other buildings who were operating as instructional leaders. Teacher leaders are in a role of instructional leadership so it is logical that they would be frustrated with administrators operating as managers.

**Frustration with bureaucratic interference.** In addition to administrators living in a management or learning paradigm there were also tensions between the reform initiative and the bureaucracy of the school division. This was represented by teachers resisting change because of bureaucratic responsibilities and also in the bureaucracy of central office. Devin talked about teachers in his building resisting change because of other managerial duties they had to carry out: “There were certain people on the staff who came forward and said we just can’t have anymore of this [reform initiative] stuff on our plate because we have got so much other stuff. He mimicked: “oh there is so much change…I have to move my room, I can’t do all that reading. I can’t, I can’t”. Jordan touched on the problem of bureaucracy in a large school division:

> It would be nice if schools and central office were more in sync...I can see that is going to be a work in progress. Bureaucracies are big and burdensome. They don’t flex quickly. There are so many parts.

Jordan’s comments indicated that there were times when the bureaucracy impeded the changes that were occurring within the reform initiative.

Another aspect of the bureaucratic structure that interfered with the reform initiative was the lack of flexibility in the school schedule. Jordan spoke about the difficulties of setting up meetings for staff involved in the reform initiative during lunch hours. Because of all the other activities occurring in her building, it was difficult to bring people together. Lane expressed
concern over teacher leaders being timetabled so that they could share a common prep. When teacher leaders did not have that common prep time, their work became more complicated. He described a time where he and his teacher leader partner did not have a common prep: “I remember trying to visit [my partner] and [my partner] trying to visit me, and we would always have a class in front of us and how sort of tough and awkward that was”. When this description is compared to his thoughts on a time when he shared preparation time with a teacher leader, the difference is marked: “the other [teacher] leader and myself have a common prep which we find to be essential. We meet with our administration to ask how things are going and to plan and to talk about different things”. When the bureaucratic structure of the timetable threatened collaboration time, teacher leaders felt frustrated and less effective.

**Experiencing the Challenges of Leading**

During the interviews the participants identified a number of challenges of leading. In fact, several of the other themes could have easily been placed here. There were frustrations associated with teacher leadership identity and there were frustrations in sustaining the reform initiative. As well, there were frustrations with negotiating the tensions between management and instructional leadership. However, I separated those themes because I felt they stood alone and needed to be presented separately. The additional tensions and frustrations that arose are presented in the following sections within two subthemes: Concerns regarding relationships with colleagues and challenges in leading staff professional development. These two areas continually surfaced during the interviews and seemed to be a significant piece of the experience of teacher leadership for the participants.
Facing the stresses and strains of changed relationships. The relationships the participants had with their colleagues were tested and stretched in their new role as teacher leader. Many of the pre-existing relationships were challenged as these teacher leaders took on their formal role. This happened in three different contexts: in their relationships with their administrators; in their relationships with their teacher leader colleagues; and in their relationships with their teaching colleagues.

Both Devin and Jordan experienced tensions in their relationships with their administrators. Devin’s frustrations stemmed from his perception of his administration not being deeply involved in the initiative. As was presented in the prior section on negotiating between management and instructional leadership, Devin wanted his administrators to be instructional leaders. When his administrators made decisions to cancel professional development sessions this contributed to the tensions in the relationship. He describes their differences in these comments:

Maybe they understand change better and that it is going to take longer. And maybe because I’m at the point I am in my career …let’s go a little faster. We can go faster if we push, and you know what, they’ll cope. When I teach kids and I push they go faster and they learn. And we do to. And for the most part they don’t hate me, but the [administrators’] vision of the world is not that one.

Devin seemed to feel that his administrators should be pushing resistant teachers to take on some of the teaching practices advocated by the reform initiative. He spoke about confronting his administrator about his concerns and challenging his administrator on some of the decisions that were made. For Jordan, her frustrations were related to “a lack of administration attention and
support”. She felt there needed to be more awareness on the part of administration of what was happening with respect to how teacher leaders were being received in her building:

I’m a little concerned about sometimes what I see in our conduct and our professionalism. When people, you know are anxious or angry or scared…they don’t always show the best attributes and I think we need those reminders. I think our admin teams need to watch for that…and really support…so that when leaders step out [they are supported].

...I have seen [teacher leaders] become targets…not just in our building. I have heard that from other buildings too. Where [teacher leaders] feel like they are looked down upon. That is really in my mind, tragic.

Jordan’s concerns indicated the tensions she felt with her administration and their perceived lack of support. In addition, her comments foreshadow the sub-theme of relationships with teaching colleagues. In contrast to Jordan and Devin, Lane spoke of how supportive his administrative team was and his experiences do not suggest that he experienced tensions or frustrations in those relationships. In fact, he described one of his administrators as a mentor and praised both of them for their work on the reform initiative.

Relationships with teacher leader colleagues were another area where the participants experienced some tensions. Devin described feeling isolated and alone and felt burdened by his role as a teacher leader. He attributed this in part to the different relationships with teacher leader partners he has had. He contrasted what he thought to be a successful collaborative relationship against relationships that were not collaborative in nature or where there was no “clicking” as he put it. Lane’s experience suggested that when the teacher leader partnership was a positive relationship, the feelings of isolation were diminished. He spoke of his relationships with teacher leaders as helping him to do his work and emphasized how important it was
“Professionally and even socially…that you just feel comfortable enough to talk and share your feelings about something” with your partner. When the partnership was not used there are feelings of isolation. In the interviews it was apparent that the relationship with the teacher leader partner was a powerful component of the experience and shaped how the teacher leader experienced the phenomenon. Jordan experienced different relationships with teacher leader partners as well:

It is a totally different relationship than my first one. It is more challenging because of…one individual style is a different philosophy that comes from a different time. But, it is changing too, and it is quite interesting. But, it makes the work tough sometimes...complicated.

Jordan’s comments reflected how her experience of leading changed when she was leading with a different team. Both Jordan and Devin’s experiences suggest that the relationship a teacher leader has with their partner impacted their experiences. Jordan spoke about changing her leadership style to complement the style of her new team and Devin spoke about really connecting with one of his partners. Lane too, spoke about knowing your teacher leader partner and using that person as a sounding board and as a support. Although this sub-theme is presented as part of the tensions and frustrations of leading it is also an aspect of the final theme, feeling the empowerment of success.

Tensions with teaching colleagues arose for all three participants. For Devin these tensions seemed to be linked to his frustrations with those who were resisting change. He spoke to me about the reform initiative and explained:

It wasn’t working for a lot of people. They weren’t there yet. They didn’t see it. They’d say, “damn kids if they would do what they are supposed to do they’d be quite
successful”! Not, the whole damn system is not quite right…it only works for a few and even those that it works for are probably ritualistically engaged. For the most part students are doing it because this is the culture where you need to do that, to get where you want to go. There wasn’t a more passionate vision of education.

...I guess different people react in different ways certainly. I am not very sympathetic...it is just like, deal with it…you have got to do it.

Devin told me of his frustrations with his colleagues resisting the reform and how he felt they held the work of the initiative back. He acknowledged that there were incidents where he was impatient with one or two of his colleagues and thought that may have contributed to the tension.

For Jordan, the tensions with teaching colleagues were evident in her description of how teacher leaders were treated unfairly:

I think sometimes there is a little bit too much nattering in the back rooms. When people step out and are leading and if things don’t go exactly the way they want them or you know…speaking and leading and stepping forth at staff meetings when you are supposed to do it as fast as possible and just lead agenda items and not talk about anything thoughtfully or have any discussions. Then they get put down…but not to their face. Then they pull in sort of a tide of meanness. I call it meanness. It is meanness. There is no place for it. You know that really concerns me. People who aren’t stepping out or who have decided they have had enough or this isn’t supported so I am walking away. Well there are still people working and trying and working towards those ends. I don’t think there is any place for that kind of attack. And it often goes personal right? Where they just look for silly personal shortcomings…
Jordan’s remarks suggest that formal teacher leaders in this reform initiative were prone to the attack by their colleagues. It seemed that when teaching colleagues did not agree with the reform initiatives they were attacking the messenger.

Like Jordan and Devin, Lane experienced tensions with his teaching colleagues. He described an experience where he was approached by a colleague and openly criticized.

I had a colleague go on a tangent about professional development. Someone who I respect...and is an experienced teacher had a heart to heart conversation with me in terms of professional development after we had done this. She was being the voice for a lot of other people…why are we doing and focusing so much on this AFL? People are getting sick of it and we have to be here at eight in the morning to listen to it and we’ve heard it before. We need to have some fun and do some other things and people are sick and tired of PD. So that was disheartening and I know at first, I went away angry.

Lane’s anger and his colleague’s frustration reveal the strains and stresses on their relationship. Lane felt he was doing the right thing as a teacher leader. He was fulfilling his role and he was passing on the messages of the reform to staff. The experiences of the participants seemed to indicate that the relationships teacher leaders have with their colleagues became strained as a result of their formal teacher leader role.

**Challenges in leading staff professional development.** All three participants experienced challenges and frustrations in leading staff development. All three indicated that this role was one of their primary responsibilities as a teacher leader. Devin described a professional development session he led where tensions rose to the surface:

There were a few people who were quite upset. A little unprofessional, but the passion was there and people were expressing their feelings and it was all out on the table.
...It was interesting that one of the members in my department who sometimes has played the devil’s advocate….he came to me after the [session] and said you weren’t worried about that at all. That was pretty fiery and you were completely in control and you were managing it. Where [my partner] on the other hand… every time the voices got stronger [my partner] backed up and moved further into the pillars. I was more going forward…I saw it as an opportunity…once the passion is out on the table then we can start to discuss because everyone has laid their cards out on the table and then we can start to make some adjustments. I don’t know. I don’t know if [administration] is not comfortable with conflict so we got away from that conflict? …But, sometimes passion is not bad. You know…if all people care about what they are doing that much? Then that is pretty important…so it is just channelling it and working with it and moulding them. When we cancelled [future professional development sessions] I thought no….what are we doing and yet there was another little voice going okay! I’m off the hook for that preparation and I don’t know….I thought about that afterwards wondering if that was a sign I was getting tired that there also was that little relief…I don’t have to do that work. I don’t have to get the next piece ready. But, from now where we are…we blew it. I thought that was a great opportunity.

As Devin’s description reveals, a number of challenges arose for him as he led staff development. There was conflict with his teaching colleagues, there was anxiety on the part of his teacher leader partner, and there was disagreement with his administrator’s response to the challenges. Devin did recognize that these tensions were not because of him. He told me that it was not the “messenger as much as the message that people are so resistant to...just the feeling that the top is
forcing it on [teachers]”. Although Devin does not feel like he was being personally attacked, his role in leading staff development seemed to have resulted in some new tensions.

For Lane, the challenges related to professional development centered more on his self image and his confidence as he led his staff:

I remember the first time having to present some of this stuff with [the reform initiative] and AFL…we as [teacher] leaders were expected to present some of this stuff, but I wasn’t wholeheartedly sold on it. That was also an uncomfortable place to be. Here I am now, saying what it is and why you should be doing it and the strengths of doing it…but myself, not having a great experience with my own class…it was weird. It was. Now, after that first year as I said I have switched whole heartedly in my philosophy and beliefs but I really remember not being sold on it…but here it is folks…this is why you should be doing it and here it is.

…It was quite daunting to be the expert to our staff and to teach our staff. You know we were able to learn a lot ourselves, but I remember it being quite stressful because I wasn’t up on it as much as I would like to be. It is kind of like being a first year teacher again…geez I would like to be more prepared and have a better handle on this stuff, but here I go.

Lane came to feel comfortable with the philosophy of the reform initiative and these challenges subsided for him. However, he too experienced challenges related to how staff received professional development:

Anytime you put yourself out there as a leader you aren’t going to get 100% buy in, not even close…as much as you would like it to be. Part of the frustration is now that you see this as being the way to go. So, look how good this is for kids and why can’t you see
that...and again it comes down to that person’s philosophy. But that is a frustration... that people are against what others are trying to do. It is that negative stuff.

...A lot of time when we are part of professional development...some people go on a witch hunt where they right away look for the negative aspect. How can we cut this down? How can it not work for me? As opposed to...we should be going on that treasure hunt. How could this work for me? What parts of this could I take out of it? I may not take all of it, but I like that and I will try that piece. So, too often some staff members go on that witch hunt and that is a frustration. Where they are just finding one negative aspect of it and sticking to it as opposed to trying to find positive aspects from it.

Lane’s comments suggest that for these participants, the response of colleagues towards professional development was frustrating.

Jordan too, experienced challenges with leading professional development. She felt comfortable with the material she was presenting, but she was often puzzled by her colleagues’ reactions ranging from anger to indifference. She also found the bureaucratic structure to be a challenge in engaging staff in professional learning:

The current structure the way it is set up… it is madness. No one can understand it…no one can hold it in their head…they hold it moment to moment. We do that a great deal in this profession. We are barely hanging on to those ideas and then we have three and a half days a year where we are going to come back and visit them? It is so superficial. So there are so many things that I think we need to grab hold of when we are trying to understand professional learning and what it means and I think we could have some real opportunities. If we understand what we want to do first of all and then build it in to the structure or flex the structure in ways that teachers can really pursue it and learn it….and
then build some more momentum and build that number. But you can see how it will take time.

Jordan’s comments indicated her frustrations about the structure of high schools and how the structure is a challenge to professional learning. This would also fit within the theme of negotiating the tensions between management and leadership.

The participants’ experiences related to staff professional development revealed that there are a number of different forces that contribute to the tensions in leading professional development. The participants experienced tensions related to their own thinking and self image, tensions related to the reaction of colleagues to the learning, tensions with administrators on how to engage in the learning, and tensions with the structures of the bureaucracy.

It seemed that frustrations and tensions were an inevitable part of being a teacher leader. All three participants’ experiences reflect this. Lane’s reflection on this was particularly insightful:

Often when [it comes to] leadership...you are making a decision. Any decision that you make, people are going to disagree. I think that is where the frustration lies. I do think that is inevitable and something that just has to be worked through. It is just reality I guess. That is my own feeling. Strength wise of a leader is how they handle that. So, you know maybe carrying out...why...why is this not working for you and trying to come to some understanding with that teacher who might be balking or disagreeing with what is said. The strength lies in how it is handled I guess.

The frustrations and tensions were a reality for these teacher leaders. They could not be ignored. They had to be dealt with. Later in this chapter is an account of how teacher leaders made sense of these frustrations and tensions.
Feeling the Empowerment of Success

Despite the tensions and frustrations that seemed to be inherent in the experiences of these teacher leaders, there were also moments of excitement and joy in leading. All three participants felt the empowerment of success. They felt like their work was making a difference with students and teachers. They came to understand that they were leading and this empowered them. In this section, data are presented that reveal this empowerment.

For Jordan, working with her school team was a positive experience and enabled her to engage in her own learning and have powerful conversations.

I think one of the nicest parts was that now I had two people that I worked really closely with and got to learn from. What I loved was how deeply we got to really think about research and what we were reading.

This deep learning and discussion seemed to extend to her experiences with her teaching colleagues. With her colleagues, she witnessed philosophical changes in beliefs and practice. This was empowering for Jordan.

*Interviewer: what has been your experience as a teacher leader? Some of the experiences that come to mind right away that illustrate what it is really about.*

Rich conversation…rich professional conversation. Witnessing teachers really reflecting and verbalizing and sharing it with colleagues that maybe don’t even teach in the same area. Wonderful. Also, watching real anxiety and frustration and concern about the change…and handling it amid so much pressure, so much stress…Then really wondering…some wonderful questions about their beliefs around teaching and practice. That, just that questioning has been really exciting. So, the conversation is often the
shared experience, but then the questions and the teasing out and the searching…that has been good, very good.

As Jordan spoke about these conversations her excitement was palpable. When Jordan needed to be reenergized or needed to feel empowered, she returned to a small project that she knew she could work on with another teacher and feel success. She controlled her empowerment.

For Devin, feeling like he belonged and had influence seemed to be his source of empowerment:

Now, as I look at in three years or after three years, umm, yeah I probably feel a whole lot better. Yeah, I was right to be there. And actually, probably in terms of influence in what we are doing and where we are going I have been influential. I was part of a push for a systemic picture or a systemic overview of what is going on, and how it is happening and so on. I am probably one of the two or three that has a greater understanding of that now. Or maybe that is a delusion I have, I’m not sure.

Devin also felt empowered when he reflected on data that he perceived as evidence that his work was making a difference:

And it wasn’t really until our first reporting period that we started doing some more detailed testing on the kids, and then it was, “holy cow these kids are really getting it! We are seeing some improvement.” [The teachers] got results. So the feedback that what they were doing was good ….renewed them, gave them a resurgence to go beyond. And then the year end tests that we completed did show that [the students] had improved their Math and reading, and quite substantially. We’ve got it documented. Umm, that was very gratifying and very exciting.
Devin’s comments suggest that he was not the only person empowered by this data. Devin perceived that the teachers involved in the reform initiative program were also empowered by the data—that it revitalized them and gave them momentum to continue.

Lane felt empowered when he led projects related to the reform initiative that he perceived as successful. One of the examples from our interviews is when he shared a new assessment strategy with teaching colleagues and one teacher made changes to her practice:

_Interviewer: You mentioned that conversations are changing and beliefs are changing in some cases. Can you think of an example where you were surprised by something someone said or did and you thought yes, a difference is being made here...we are moving along._

My [colleague] tried [the inquiry based assessment activity I had presented] and she thought it was awesome. So thank you for this and wow, did it ever work well. So sort of that switch happened…I guess it is because she was sort of shown something that she could do. It was sort of a hands on, here you go, and she was able to live it.

Besides this experience, Lane described other situations where he felt good about his work based on the feedback he received from colleagues. This feedback seemed to empower him. He also described a professional development day that happened at his school. The day was planned in response to a conversation he had with one of the teachers who was frustrated with the way prior professional development had gone. In this passage, Lane revealed how this day was an empowering experience for him as a teacher leader:

_It was such a positive thing and...it was built from our whole leadership council so a lot more voice. I guess it is just sort of nice to hear that the reason this happened was because of this conversation that I had with this teacher who was sharing frustration of_
herself and from other colleagues too. So, that was an eye opening experience. And now since, any time we plan PD, it is leadership council involved. And now, even taking that further we have to build the strategic plan…at the last leadership council I took it to them and said under [the reform initiative] what do we want to focus on? So instead of just [teacher leaders and administration] building that it was sort of all of us having a say and that will carry us into next year’s professional development as well.

In addition to feeling empowered, Lane also seemed to be empowering others by distributing leadership. Seeing this leadership flourish was additionally empowering for Lane.

**Summary of the Experiences of the Participants**

The data presented in the preceding sections are the essence of the lived experiences of selected teacher leaders in this particular reform initiative. The overarching themes and their subthemes are synthesized in Table 2. These are the essential experiences of three selected teacher leaders in the context of a reform initiative.

Table 2.

*The experiences of selected teacher leaders in a specific high school reform initiative*

<table>
<thead>
<tr>
<th>Themes and Subthemes</th>
<th>Lane</th>
<th>Devin</th>
<th>Jordan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grappling with teacher leadership identity</strong></td>
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<tr>
<td>Concerns with self image as a formal teacher leader</td>
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<tr>
<td>Desire for credibility and influence</td>
<td>*</td>
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<tr>
<td>Negotiating personal views and identity as a leader</td>
<td>*</td>
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<td>*</td>
</tr>
<tr>
<td><strong>Facing the uncertainties of sustaining the reform initiative</strong></td>
<td>*</td>
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<tr>
<td><strong>Negotiating the tensions between management and leadership</strong></td>
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<tr>
<td>Concerns with administrators’ tendencies toward the managerial</td>
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<tr>
<td>Frustration with bureaucracy interference</td>
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<tr>
<td><strong>Experiencing the challenges of leading</strong></td>
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<tr>
<td>Facing the stresses and strains of changed relationships</td>
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<tr>
<td>Challenges in leading staff professional development</td>
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<tr>
<td><strong>Feeling the empowerment of success</strong></td>
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</tbody>
</table>
The only experience that all three teacher leaders did not share was concern with their administrators’ tendencies toward the managerial. Lane did not share this experience with Devin and Jordan. In fact, he praised his administrative team for their instructional leadership during the reform. Although Lane did not have this experience, it has been included in the presentation of the data as it seemed to be a large part of the experiences of Jordan and Devin. Besides this challenge in being a teacher leader, the data presented in this chapter and summarized in this table reveals that there were a number of stresses on teacher leaders. The second part of this study looked to find out how teacher leaders coped with these experiences and how they made sense of them.

**How Teacher Leaders Made Sense of Their Experiences**

The second part of this study aimed to discover how participating teacher leaders made sense of their experiences in the context of this specific reform initiative. The initial interviews revealed some data related to this question. To bring forth more data the interview transcripts were reread and specific experiences were highlighted. Then a set of questions was developed for each participant that were designed to get at how they understood their experiences and the sense making they invoked to grasp what transpired in their role as a teacher leader. The data revealed recurring ways of making sense of experiences within this specific high school reform initiative. Lane, Devin, and Jordan made sense of their experiences in four ways: (a) learning; reading to understand their experiences; (b) communicating; talking with colleagues; (c) doing; acting on their experiences and (d) reflecting; thinking about their experiences. The following section describes each of these processes of sense making in detail.
Learning; reading and listening to understand their experiences

Devin, Jordan and Lane all made sense of their experiences by learning. They increased their knowledge by reading and by attending the professional development sessions organized and provided by Ford Park Schools.

Devin explained how he read to understand and developed a framework for his experiences:

[I] just sat and read with no one else around. I sat, thought and reflected. I remember reading Schlecty’s book *Working on the Work* and bringing about change, and there were a couple of pieces in Tomlinson’s book on bringing about system change. I’m fascinated by the way systems work and then suddenly it is like, okay there is a bit of a framework here. It was at that time that I had been introduced to Anne Davies. I had read a little bit of her stuff and I thought, you know what this is more hands on. I guess that was when I started to feel like okay, maybe I have got the framework here…so I guess that was probably a four month or six month journey. Then I felt like, okay I’ve got it.

Devin was concerned about the direction of the initiative. He was having difficulty with the variety of materials presented to him and making sense of how they all fit within the reform. By reading and thinking about his reading he was able to make sense of the experiences he had during his professional learning. It took him, as he said, four to six months to understand—this indicates that the learning was complex. However, it was worth it for Devin; getting to the point where he felt he had a framework empowered him:

I guess as more and more materials were presented to me over time I have become more theoretical. I have done a ton of reading, I really have. Annotated through all the things
that I have gone through. Developed more thoughts about it. So, I have become more of
a lifelong learner which is because of this process. And, I’ve felt good about that.

Devin’s understandings of the philosophies behind the reform initiative were deep and
multifaceted. During our conversations on the telephone and before, during and after our formal
interviews he spoke to me passionately about the ideas within the reform initiative and how he
felt it should move forward. His learning gave him a confidence about being familiar with the
research and what he understood to be best practice.

Lane spoke about how his professional learning helped develop him as a professional and
how his learning shifted his philosophies and beliefs. Like Devin’s experience, this took time.
Lane disclosed that it took him his first year as a teacher leader to make this shift in philosophy.
He described that year as being a struggle not only for him but also for his students as he tried to
understand the material he was being presented on assessment for learning and inquiry:

_Interviewer: When you talk about [struggling with the PD] you mention the first year a
lot and that there was a lot of pressure then. Have you seen a difference since?

I think so. It has to do with my comfortableness with the actual assessment piece and the
inquiry piece and the differentiated instruction piece. I had just become more
comfortable with it too and therefore able to not spend as much time learning about that
myself. But the first time I learnt about that stuff I had to try on my own first not really
knowing much about it. That way it was a struggle for them too and I thought, wow, that
didn’t go very well. I mean, I knew as a professional I would do this and this
differently…but that didn’t help the kids sitting in front of me. So, it was that whole
aspect. For sure, I think [the professional development] has helped me…from that first
year I had a shift in philosophies and beliefs which has now helped the students in my second and third year. I think it has changed...for sure.

As Lane learned more about the philosophies of the reform initiative his discomfort eased. He felt more confident that he was doing a better job with his students and he was pleased with the growth of his professional beliefs about teaching.

Jordan did not have the same challenges in understanding the philosophies of the reform, but she too did a great deal of learning to find the answers to questions that arose from her experiences. She explained some of the learning she did and how that created more questions for her. She learned about leadership skills, the multiple qualities of leaders and above all the need for knowledge and understanding of fellow team members:

I started to read more and look more at leadership. It is really a fascinating area isn’t it? I would love to take time off and just learn more about that. But I don’t think we have pursued that enough...I think it is coming about. I think facilitation is huge...and something that we know very little about...and that would really help teachers in their classrooms move away from that paradigm of teach from the front and talk from the front. So those are some just real skills around this. Building leadership skills...how do you facilitate and how do you convince, how do you support? Like the how-to’s. I have learned things just from years and years of stepping out and leading. That is where I learned. And just being a people watcher. I don’t know how leaders come to be or are chosen to be leaders...what essence do they have? And then different styles of leadership...that brings really interesting qualities to the mix. You have got charismatic leaders, authoritative leaders; you have leaders that really are collaborative...sort of the really loving leaders. Now that really sets a challenge for the leadership team. You
really need to understand one another and what you bring and then examine the context
that you work in and what works best and where you need to build.

The reading that Jordan had done around leadership resulted in her reflecting on her own
leadership style and how she came to be that type of leader. This knowledge about leadership
helped her to make sense of her own experiences as she came to understand the personalities and
leadership styles of the leadership team in her building.

**Communicating; talking with colleagues**

All three participants talked with their colleagues to make sense of their experiences. As
they communicated, they came to understand their experiences in different ways or their
thoughts about their experiences were reaffirmed and they felt secure. These conversations were
with teacher leader partners, with colleagues outside the building, and with teaching colleagues
inside the building. Samples of these conversations that helped the participants to make sense of
their experiences are presented in the paragraphs that follow.

When Devin became frustrated at the enormity of the work he felt he had ahead of him to
make changes to his teaching practices, his teacher leader partner helped him to contend with this
frustration:

I came back from [vacation] and I [had] read about [differentiated instruction] and I
really had a vision in my mind of what that would look like. And I came back so
frustrated; [my partner] had to talk to me. I said, “it is going to take me 5 or 6 years to
change all of my classes to what they should be, and...I’m just not going to get there”.
His response was pretty good; it was “peck away at what you can do. Just peck away at it.
Tinker with that.” And I guess I’m accepting that, I’m just taking things gradually.
In talking with his teacher leader partner, Devin felt relief and came to understand that he could not change everything at once. Besides his relationship with his partner, Devin described his collaboration with a principal and teacher leaders in a different collegiate as reassuring and helpful. Having someone to talk to about the reform initiative and his experiences helped Devin to understand it and to accept the difficulties inherent in his role as teacher leader.

Similarly, Lane shared his anxieties about the reform initiative with his teacher leader partner. For Lane, it was important that there was a personal relationship as well as a professional one with his partner.

Anyone that you work with it is really important that you get along with that person. Professionally and even socially…that you just feel comfortable enough to talk and share your feelings about something. Having a prior relationship with that [teacher] leader is huge. So that you are comfortable right away, as opposed to not knowing that person.

So, taking the angle that I did not know [my partner] and we were stuck as [teacher] leaders together…I might not have been as comfortable to share my own personal philosophies about something. Geez you know, this whole AFL stuff, I don’t get it…I am not comfortable doing this. I might not have been as comfortable to share some of those things. I might have tried to build myself up to show that I am more competent.

But, in knowing [the partners I have had] and having those relationships and feeling more free to share those personal feelings about whatever it is…within PD or [the reform initiative]…I think it really helps a lot.

Lane’s comments suggest that sharing his feelings about what he was learning and experiencing helped him to move forward. Lane also utilized his personal relationships with teaching colleagues to assess his effectiveness in communicating professional learning:
You sort of have your close knit group that you are comfortable with in your own building colleague wise. So I would ask those colleagues that I have coached with or taught with maybe in prior buildings…so how did that go? Do you think it was well received? Did people get it? What are other staff members feeling about it?

By talking to his colleagues, Lane was able to come to understand how his experiences were perceived by others and check as to whether his interpretation of how things were going was valid. Devin also talked with his colleagues to check as to whether he was still credible as a formal teacher leader. He called it “sniffing the wind” and asked those he trusted to talk to others in the building to see if his voice was “tired” and whether his building needed “a different voice a different way”. Both Lane and Devin talked with others to check their progress and judge their effectiveness.

In other cases, the participants talked with their colleagues to help them deal with their frustrations. Devin described a situation where he and his teacher leader partner were embarrassed by how some of their colleagues were reacting at a citywide professional development session:

To see them just kind of rejecting all this best practice and not even really being open to the processes going on…it was embarrassing that we would be working with people who were working like that. Embarrassing that we were trying to work in an environment where there would be learning and this was how they were behaving...I guess we were embarrassed but probably more greatly we were disappointed.

Interviewer: Did you address it in any way?
Actually we did. We talked with [the coordinator of the reform initiative] about it. And we came back and talked with [our principal] about it and told [our principal]…this is what happened.

By speaking to the coordinator of the initiative and his administrator, Devin was able to share his feelings and this helped him to make sense of what had happened. As well, these conversations resulted in him and his administrator developing a strategy for dealing with the behaviour of his colleagues. If Devin had not had this conversation, the situation may have grown worse.

Jordan ended up welcoming the tensions she had been feeling at professional development sessions with her colleagues. She recalled being surprised by the pushback and the negative conversations she had during some of the earlier sessions. After seeing how this experience could play out and how those who pushback often come to understand she came to welcome the challenges from her colleagues:

I guess you get thicker skin and you actually find it sort of a challenge….like you want to see where you can go with it. I mean you don’t want a lot of hostility but a little bit makes it interesting to play with. So I think that comes over time you get thicker skin and you see [who is a] yeah and [who is a] nay and it will just be that.

To make sense of the negative conversations she embraced the dialogue with staff knowing that the conversations could lead to change. She described situations where she saw teachers grow and learn because of these conversations. However, she also felt that although talking with colleagues sometimes helped to invoke change, it was also dangerous:

I guess I have witnessed [negative talk about teacher leaders] too much and I have had to say something. Oh, I must just sound like a mother. I feel like you know… I will say I really can’t hear that…I find that really hard to bear. They are trying to work towards
something…if you want to be constructive fine but I just don’t want to hear it that way.
You just know. You just know when there is whispering and nattering. So I guess…as I said I felt like the priest at times…I felt like people maybe told me too many things. On one hand they are just getting it off of their chest and they are just dumping it somewhere and then you try and re-label it and energize it and refocus it in a positive way. But there were a number of times where I just didn’t want to hear any of that because I just found it toxic. And how do you handle that? It is such an interesting question and you worry too that you become tainted by it. Because it is amazing…one little innuendo…one little thing leaves a stain. Even a brief questioning stain even if you don’t believe it. That’s life. That is human existence. But there were moments where I was just disappointed in some people that could have been very positive voices. Maybe they were frustrated because they weren’t included. So it is all a bit of a conundrum but that concerns me. It concerns me on a number of levels. I think we have to be really careful…and at higher levels too… that we watch what we say…and with increasing levels of power we have to be extremely careful who we listen to, how we listen and what we listen to.

Jordan’s experiences have taught her that as a leader she had to be careful about how she was perceived by others. Sometimes the talk became “toxic” rather than a way of making sense. When that happened she had to end the conversation.

**Doing; acting on their experiences**

There were times when the participants felt that the reform initiative was not moving quickly enough or that people around them were not acting when they should. When this happened, the participants went into action. Sometimes this meant pushing administration from below to act on an issue. Sometimes this meant just doing something small themselves to test it
out or to keep momentum going. Jordan described the feeling of paralysis that occurred for her and how she acted to remove that feeling:

There is a paralysis there…a lot of talking…and I am a philosopher certainly…but I also really believe that you have to move and act in order so things change. I feel like we haven’t had the momentum that we need.

In our second interview I asked Jordan about how she did this:

*Interviewer:* I am wondering how you as a leader…how do you try and get things moving when there is a paralysis on your [teacher] leader team? Tell me about the way you lead your colleagues.

Then I go small again and I go on one small front and I work with a couple of people where I know we are vested and where you can get energized again and I pull it up from there. So that is what I did. I went back into some classrooms, working with teachers. Got some great feedback from kids and a teacher...I started the work going again because I can’t talk about it anymore. I just have to go.

*Interviewer:* So you did something on your own then?

Yes. And that is what you just have to do sometimes. Talking and talking is too draining. I don’t want to just talk about what isn’t working or you know about colleagues….I don’t want to live there. It is just not worth it. I don’t get energy from it and it just saddens me that we focus on it. It just really saddens me. So I just kind of pushed it away and we are either doing something or we are not.

Jordan seemed to make sense of her experiences by altering them when they became too much to bear. If what was happening was not working for her she spent her energy on changing her situation.
Devin made sense of his experiences by trying to change the things that he felt were not working. One of the ways he did this was by pushing his administrator from below to make changes to the way things operated at his school:

There are times where I openly…not openly in front of other people, but openly [between my administrator] and I, where I will say…we can’t do that…what are we doing? …I’m probably way over-stepping my bounds…but I guess I do it just because I have been [at my school] long enough.

In addition to challenging his administrator, Devin also spoke about questioning central office administration on some of their decision making. Devin’s actions were deliberate and were designed to change the way he was experiencing teacher leadership. He saw areas that needed improvement and he tried to push those with more power and authority to take a leadership role on these matters.

When Lane had difficulty understanding his experiences, he acted. He practiced the assessment for learning strategies he was learning about with his classes until he was comfortable with them and had made sense of them. He described this experience:

[My students] have had to be the ones that I have sort of tested things on. And sometimes whenever you teach a new class or new curriculum you are not as strong at it the first time through. That is so true when I think of my own experiences. Thinking of co-constructing criteria as an example, it sort of didn’t go well the first time, and now in going through it more and more and getting that student voice I think it has changed a lot. I think it has to do with my comfortableness with it.

Talking and learning about assessment for learning was not enough to make sense of his experience of professional learning. Like Jordan, Lane had to take action to complete his sense
making. The data from the interviews suggest that practicing the theory behind the professional learning was an important aspect of making sense of the experiences related to the school reform initiative.

Reflecting; thinking about their experiences

Reflecting seemed to occur most after the participants did their learning, communicating, or doing. The participants may have read to understand, they may have talked with colleagues, they may have acted and done something to test their experience and they may have pushed others to do some of their own leading. Whatever they did to make sense, they seemed to reflect afterwards. They thought about their experience, their knowledge, their conversations, and they decided on a course of action or whether or not they needed to change something. The excerpts from the interviews presented here are resonant of the deep reflection that the participants engaged in to make sense of their experiences.

Jordan reflected on a particular experience she had with a teaching colleague. Using metacognition, she came to understand the experience as she thought about it:

When I think about some of the changes that I have witnessed... I remember one colleague, who I would say is a master teacher and is renowned and wonderful felt so devalued by this initiative. So angry that it was led by student voices...so frustrated. I just remember this anger rolling out...and for probably two years. It was really puzzling because she exhibited incredible qualities that you would wish for in every classroom in relationships with students and colleagues. So, what was it that she felt so powerless or devalued by? What I realized is that you know...this incredible expertise was overlooked and wasn’t brought in from the beginning and wasn’t looked at in a certain way. So, she was just terribly hurt by what had gone on. But you wouldn’t have expected the strong
It took until this year to really visit her classroom and look at the work she was doing and bring it forward...and set up a little small action group all about inquiry learning...she has such insight...and finally I see her kind of moving to understand and accept and deal with this. But, that for me was such a puzzling and interesting...I don’t know...you wouldn’t have expected it. So, it reminds you when initiatives start...how you bring everyone in so that they feel valued. How do you do that? It is a challenge. To really communicate...it is a challenge right? You don’t have the person power to bring everyone in at the beginning. So very interesting. I guess I have wondered about that a lot. Whenever you start something and carry it out, you don’t want to have regrets about how you stepped and started and formed these relationships. So I guess that is one thing that has remained with me.

Jordan’s experience and her description of how she came to understand it suggest that reflection was an important vehicle by which she made sense of her colleague’s resistance and anger. Jordan made sense of her experiences by talking to others, reflecting, acting on them, and then reflecting again. She came to understand how her colleagues reacted to the change:

It is the changing or lack of changing structures that will support that growth and what will happen...so we problem solve around that. What can you control, what can’t you control, and where can you find a place that you can do that change that needs to happen and live that. Typically, you know you share your own experiences...how you are trying to walk it. And, you laugh a lot, and you find the humour in situations that are incredibly tense and frustrating...and that diffuses much of the anger that can happen too. Or, you let it play out a bit and then you come back to it. I had many teachers, especially that first
year say "oh I was so angry that first while, but just all of a sudden, I get it now and I see how what I was doing didn’t always fit with this.”

*Interviewer:* So in dealing with conflict then, it sounds like you have a variety of strategies. Does it depend on the person?

Absolutely. And probably it depends on how you personally feel about that thing. You know, how connected you are to that. Whether you can step back or remove yourself a bit and not personalize that anger. But, it obviously depends on the person. I know for some people they just have to blow that anger out and it may be at you, it may not be at you but they have to release. They may not be, unfortunately very sensitive…but that is just who they are. And for others, you know you can revisit it and look at how things have turned around.

The reflection that Jordan engaged in helped her to understand her experiences, accept them, and learn from them. She was able to understand her colleagues behaviour and depersonalize it so that she could be more effective in her work. In addition, her reflection also pushed her to pursue new learning to understand her experiences more deeply.

Lane also described a situation where he used reflection to understand and accept the tensions he experience with a teaching colleague:

I didn’t show it to this individual, but after when I was by myself I was angry because a lot of work goes into the stuff that we do and a lot of work went in to planning that day. Setting up the sub schedule and classes to be covered. And I know this person wasn’t just speaking about that day but was speaking about other experiences prior and years prior. But then, you sort of reflect and I guess…happy that the individual came instead of
keeping everything in the background conversation. Instead of people talking, now they are sharing something.

Lane was able to see how this conversation was beneficial for his building. His reflection also helped him to affirm that he was right to withhold his anger from this individual and think about her reaction before he entered into verbal conflict. As he reflected, he realized that it was brave of her to come forward and that her coming forward was improving the school culture.

Devin’s reflections tended towards the reform initiative and how he came to understand the vision of the reform. As he reflected he thought about how things perhaps should have been done, or ideas he had for strengthening the reform. As he spoke about his ideas his understanding of his experiences and his thoughtfulness about them were apparent:

I think the other thing in hindsight with this whole process would be giving some kind of insight or building some kind of insight and direction for administrators. We the [teacher] leaders were the wave that sort of groped along and learned. Really the administrators were the tag-alongs. Some were dragged kicking and screaming. Maybe that groundwork earlier with principals? And certainly in terms of all their promotional practices…we are still going to have to do that shift systemically if this is our real priority. Our practices have to change. A completely unrelated thought just crossed my mind. In the business model as we are trying to learn about this process…how would we do it, how would we do it again…an exit slip from those that have left the [teacher] leader position. Why? What were the reasons? Is it I got an administrator posting? I got a posting downtown? It is too much work for one period off? I’m not philosophically aligned? It is frustrating because my administration is not on board? I can’t handle the backlash? Whatever the reasons are…we should be recording those and ultimately
maybe as a system we can learn from that too. Business does that, a lot of that exit slipping and I don’t know if we have really done that in education and I think that would really be a good opportunity.

As Devin made sense of his experiences by learning, talking, and acting he was constantly reflecting on what had happened to him and how this impacted students and teachers. His passion for education was apparent and he used his reflections to think of ways in which he could make things better for the students in his building. His motivation was to improve learning. For Devin, he felt the reform initiative was a “good shot” at bringing about the changes he felt were needed to engage students in their learning. When he reflected on his experiences and the reform initiative the interests of improving learning conditions were the spirit of his reflections.

**Summary of How the Participants Made Sense of Their Experiences**

The data presented in the preceding sections describe how selected teacher leaders in a particular reform initiative made sense of their experiences. The ways that the participants made sense of their experiences are depicted in Figure 1. Each participant seemed to be more comfortable in their sense making in particular ways. Coming to understand their experiences did not always involve all of these ways of making sense and was not a simple circular pattern. These participants had predispositions for how they preferred to make sense of their experiences but they all engaged in each of the ways of making sense to some extent. These participants are at different stages of their career and Figure 1 depicts where they were in this study. The way that they make sense will change over time.
The teacher leaders in this study made sense of their experiences by moving through varied patterns of learning, communicating, doing, and reflecting. This helped them to make sense of their experiences which led to improved understanding of their leadership identity and moved them closer to experiencing the empowerment of success.

**Summary**

This study examined the experiences of selected teacher leaders in the context of a high school reform initiative. To begin, protocol writings were collected from selected teacher leaders in Ford Park Schools. These protocol writings provided a foundation for the subsequent
interviews by providing a pool of participants to select from and by helping me shape the questions for the interviews. The protocol writing also gave me a sense of what the experience of teacher leadership was like for the teacher leaders in Ford Park Schools. From the protocol pieces, three participants were selected for the semi-structured in-depth interviews.

After the first round of interviews I transcribed and read through the interviews several times. This allowed me to identify issues and topics that I wanted the participants to tell me more about. It also allowed me to develop questions for the second interview. These questions encouraged more sharing about experiences and also asked participants to think about how they made sense of their experiences. The process of phenomenological reduction resulted in my developing themes from the research. Further reduction and imaginative variation resulted in the deletion and combining of themes to leave five essential themes that identified the common experiences of the participants and four ways that the participants made sense of these experiences.

The results presented from the interviews indicate that the phenomenon of teacher leadership (for these participants) was fraught with tensions, concerns, and frustrations with leading and relationships. However, for these participants, teacher leadership was also about empowerment, teaching colleagues, and developing as a leader. The teacher leaders made sense of these experiences by reading, talking, acting, and reflecting on them. This was not done individually for each experience. Rather, the participants tended to make sense of several experiences at the same time. The next chapter is a discussion and analysis of the data presented here.
CHAPTER 5
DISCUSSION, IMPLICATIONS AND REFLECTIONS

The purpose of this study was to expose the experiences of selected teacher leaders in the context of high school reform. In addition to describing the phenomenon of teacher leader experiences, this study was also designed to come to understand how teacher leaders made sense of these experiences. The use of phenomenology to understand what it means to be a teacher leader meant coming to acknowledge and then suspending my own understanding of teacher leadership so that I could bracket my presuppositions and biases (Moustakas, 1994) about the phenomenon. To select participants, I utilized van Manen’s (1990) concept of protocol writing. This activity set the groundwork for my study by facilitating the selection of participants suited for a phenomenological study. The protocol writing also helped me to enhance my questions and my understanding of the participants prior to beginning the interviews. I conducted and transcribed interviews with three participants.

After analyzing and reducing the data I felt satisfied that I had collected sufficient data to answer my research questions. In Chapter 4, I presented the essence of the participants’ experience of teacher leadership and how the participants made sense of their experiences. The experiences of the participants were organized into five themes: (a) grappling with teacher leadership identity, (b) facing the uncertainties of sustaining the reform initiative, (c) negotiating the tensions between management and leadership, (d) experiencing the challenges of leading, and (e) feeling the empowerment of success. The participants made sense of these common experiences in four ways: (a) learning; reading to understand their experiences; (b) communicating; talking with colleagues; (c) doing; acting on their experiences and (d) reflecting; thinking about their experiences. This investigation, however, left me with new queries and
thoughts about the phenomenon of teacher leadership and the process of phenomenological research. These contemplations and reflections are elaborated on in the sections that follow.

**Discussion of Significant Concepts and Presentation of Emerging Questions**

Throughout the process of this research, several concepts continued to surface for me. As I went through the process of reducing and presenting the data I came to realize that my study had implications far beyond the experiences of the participants; there were some surprises in the results and questions arose about teacher leader identity and the process of adaptive change. These emerging concepts that require further examination and reflection are presented in this section: (a) culture and context for adaptive change, (b) leadership personas, (c) struggling through praxis, and (d) “getting it”. To help me make sense of my contemplations and questions about these concepts I return to my review of the literature on school reform, distributed leadership and teacher leadership to support and probe my discussion.

**Culture and Context for Adaptive Change**

This study revealed that the culture and context of the school must be such that adaptive change can occur. For adaptive change to occur in education everyone in the organization must examine their beliefs and biases about teaching and learning (Heifetz & Linksy, 2002). Adaptive change is transformative change and in the experiences of these participants it meant examining beliefs about instruction, assessment, and leadership. The experiences of these participants suggested that adaptive changes were most likely to occur in cultures where the following features were present: a powerful vision, instructional leadership, a distributed leadership model, and continuous professional development. This section discusses aspects of the culture and context of the participants and examines how their culture fostered or impaired adaptive change.
For these participants, a positive context for change was having a clear vision and direction. Comparing the literature on large scale reform and the reform initiative of Ford Park Schools reveals that the teacher leaders of Ford Park Schools had been working within the context of high school reform. There is a need for direction and vision in reform efforts (Sharratt & Fullan, 2006). Ford Park Schools had identified a priority, developed a vision, and the work in the division was focused on achieving the vision of the initiative. The goal of the reform, student engagement, helped guide these participants through their work as teacher leaders.

In the reform efforts of Ford Park Schools (at least from the experiences of these participants), there was a focus on collaboration and there were developed networks of teacher leaders, learning coordinators, and teachers across subject areas. This seemed to develop a positive culture where change was celebrated and encouraged. Reeves (2009) suggested that instead of focusing on hierarchies, and the administrator as the lone leader, systems must move to organizational networks or distribute leadership, so that all are responsible for leading. When the initiative became a priority, formal teacher leader positions were created in all of the high schools. The role of these teacher leaders was fluid, responding to the needs of their individual school and community. The teacher leader was an integral part of the distributive leadership network, acting as a role model and providing support to colleagues.

The distributed leadership in Ford Park Schools was what Gronn (2003) would identify as holistic with all the leaders in the organization being dependent on one another and having clearly defined roles. Ford Park Schools attempted to have a distributed leadership network that Leithwood et al. (2007) would identify as planfully aligned. The roles for teacher leaders were created and then filled. Leithwood et al. found that planful alignment was most likely to occur in situations where there were clear strategic priorities that were clearly communicated to all of the
members of the organization. However, the experiences of these participants indicated that in the reform initiative of Ford Park Schools the role of teacher leader was not clearly defined at the outset. This was by design, as Ford Park Schools wanted the reform initiative to come ground up from the teacher leaders as opposed to from the top-down. As a result, a spontaneous alignment (Leithwood et al.) occurred where the teacher leaders were leading and acting by instinct because they did not have a clearly defined role. For the most part, this alignment of leadership seemed to result in effective distributive leadership. However, in some contexts, such as the one Jordan described, what Leithwood et al. would term anarchic misalignments occurred. In Jordan’s experience members of her staff operated according to their own vision and in competition with the vision of those leading the reform initiative. From the experiences of the teacher leaders in this study, depending on how distributed leadership aligns, the support for leaders may vary in different school contexts.

Cultures varied in the schools represented in this study. For example, while both Devin and Jordan spoke of open conflict and tension in their buildings the culture of Lane’s school seemed to be that of silenced criticism where there was no conflict in public forum. Little (1995) conducted case studies of teacher leaders in two high schools and found that, at one school the “conflicts [were] muted and criticism silenced” (p. 57) while at another school teachers pursued debate and conflict in the open. I also found that tensions and conflict emerged in different ways for the participants. Little found that this was due in part to the fact that teachers were often together in committees and groups. When Lane experienced conflict the disputes seemed to occur for him internally and he was reluctant to engage others in conflict. Although this may be related to fewer committees and groups in Lane’s school, my study suggests it may also be related to the teacher leader’s orientation to conflict and the teacher leader’s leadership style.
Jordan and Devin saw conflict as an opportunity for change and growth. Lane’s style seemed to be to resist and suppress conflict. I wonder if adaptive changes were occurring in Lane’s building or if the changes were more technical and on the surface. This echoes of Heifetz and Linsky’s (2002) finding that sometimes leaders avoid conflict by approaching problems as if they are technical instead of acknowledging that a deep shift in values and beliefs in the form of an adaptive change are necessary. A school culture where criticism is silenced may not be conducive to adaptive change.

Employing a distributed leadership model and developing empowered professional teachers through effective professional development were also key drivers in the experience of these teachers. Leadership was distributed to these teacher leaders and as a result of their experiences as a teacher leader there was evidence that they ended up feeling empowered, though once again the pattern varied. In some cases they were able to distribute leadership beyond themselves to other teachers, empowering them. This is the true sense of Spillane et al.’s (2001) concept of distributed leadership with leadership stretching over the organization: “Distributed leadership develops capacity in others, so they can become as gifted as those who lead them and can build on their achievements” (p. 93). The culture of distributed leadership was a key driver for reform and adaptive change.

Although it was clear that the participants in my study were in the context of school reform, their context was not necessarily always one of instructional leadership—this was frustrating for them because it seemed that a school culture vested in instructional leadership was imperative for change to occur. The experiences of these participants indicated that the most important condition for adaptive change to occur is a culture of instructional leadership. All the participants felt that instructional leadership was an essential aspect of this initiative. This
corresponds with Heifetz and Linsky’s (2002) findings that adaptive change is best achieved in a culture of instructional leadership and Hopkins (2007) findings that instructional leadership needs to be in place for change to occur. Administrators that had a management mindset as opposed to a learning mindset were viewed as less supportive and less effective by the participants in this study. If administrators remain managers instead of instructional leaders then adaptive change becomes even more difficult. Living as a teacher leader in a school culture with a managerial mindset was frustrating for the participants in my study.

A large part of the participants’ experience was negotiating the tensions between management and leadership. At times this tension was felt because of the managerial pull of bureaucracy. The participants felt that bureaucratic structures prevented change from occurring. Darling-Hammond (2009) found that bureaucracy led to a lack of teacher professionalism because teachers relied on the organizational bureaucracy to guide their work rather than make their own decisions about teaching and learning. In this study, participants described their colleagues as using organizational bureaucracy as a crutch for why they could not change their teaching practices.

The results of this study indicated that teacher leaders became frustrated when they did not feel supported in their role. It seems that the school culture must be supportive and encourage collaboration if adaptive change is to occur. Some participants experienced frustration with their in-school administrators and some spoke about needing further support from central office administration. Devin and Jordan both felt that their administrators were not instructional leaders and they also both experienced tensions and frustrations in their relationships with administration. Perhaps this means that if administrators were to operate as instructional leaders the tensions in the relationship would ease. Lane felt no tension with his
administrators and he spoke about them as instructional leaders. Perhaps their instructional leadership alleviated one of the challenges of teacher leadership. This suggests that if administrators operate as instructional leaders, the teacher leader working with that administrator may experience less dissonance. This relates to the findings of Firestone and Martinez (2007) and Lieberman and Miller (2004) that teacher leaders and administrators must work together to be effectual and that leaders at all levels (in schools and throughout the district) need to create the conditions where the reform can flourish and be supported. It seems that the culture and context of teacher leaders sometimes weighs teacher leaders down and sometimes it builds them up.

**Leadership Personas**

All three of the participants brought very different leadership personas to their role as teacher leader. Each participant had different predispositions to leading that were shaped before they took on the role of teacher leader. Their experiences revealed these predispositions and their own personal tendencies. One was a reflective practitioner who continually thought about her experiences and her work in the reform initiative, one was pragmatic and sought to understand the reform initiative by reading and creating his own framework, and one had aspirations towards administration and was eager and enthusiastic to do the work of the reform initiative. All of these participants made sense by learning, communicating, doing, and reflecting—but to different degrees. Certainly, each participant tended to feel more comfortable in a particular domain. The personalities and predispositions that the participants brought to their roles as teacher leaders gave them different motivations for leading. All seemed to be motivated by improving teaching and learning but one seemed to also be motivated by his desire to advance through the organization. They came to the role with their personality and values and
their motivations and these influenced their leadership identity. In addition to that though, as they went through the experience of teacher leadership, their professional knowledge grew and their self image improved. The central theme in this regard is that of identity. As they felt more comfortable in their role they seemed to feel that they had more influence and credibility as a teacher leader. It was all of these factors that helped to shape their identity as a teacher leader. Figure 2 is a depiction of the forces that influenced the identity of the participants in this study.

*Figure 2. Factors Influencing Teacher Leader Identity*

Each of these participants was self-conscious as they first embarked on their role. Growth occurred as they moved through their experiences and they became more secure and mature in their leadership role and comfortable with their own personal views and motivations.
Despite their different personalities and motivations for leading, the leadership personas of the participants had similarities. All of the participants were actively engaged in their professional learning. Jordan and Devin’s motivation for this engagement seemed to be the improvement of teaching and learning while Lane seemed motivated to learn how to be an instructional leader so that he would be better equipped to advance through the organization. All three participants exhibited respect in their dealings with administrators and with teacher colleagues. A high level of flexibility was also a characteristic of these participants; they experienced a number of challenges, tensions and frustrations and problem-solved to improve these situations. All three were adept at communicating which came through in their experiences in dealing with colleagues and leading professional development. In their roles, all three participants seemed excited about change, sharing new ideas and practices with teachers and modeling these new ways of practice. These participants based their actions on research and evidence. The participants referred to best practice in their telling of their experiences and spoke of the evidence that let them know reforms were effective. Lastly, the participants reflected and then put their ideas into action to make sense of their experiences. Although the participants had different predispositions to leading, there were a number of similarities in the way that they led.

Strong emphasis has been placed in the literature by a variety of writers (Leithwood et al., 2007; Lieberman & Miller, 2004; Patterson, 2001; Rosenholtz, 1989) on the very issues that came out of this study. In studying the characteristics of teacher leaders, Lieberman and Miller (2004) found that teacher leaders were lifelong learners. Teacher leaders have also been found to be respectful and courteous when working with colleagues (Leithwood et al., 2007; Lieberman & Miller, 2004; Patterson, 2001) and strong communicators (Leithwood et al., 2007; Rosenholtz, 1989). The teacher leaders in these studies were knowledgeable (Leithwood et al., 2007;
Patterson, 2001) and used their knowledge and communication skills to solve problems (Patterson, 2001; Rosenholtz, 1989). The teacher leaders in these studies were found to be willing to change (Patterson, 2001; Rosenholtz, 1989) and willing and eager to take risks in their professional lives (Lieberman & Miller, 2004; Patterson, 2001; Rosenholtz, 1989). The characteristics of teacher leaders found by these researchers are much like the similarities of the participants in this study.

One thing that surprised me from my research was the participant perception that being a teacher leader could actually discredit teachers, leaving them less influential. In Chapter 4, I presented data that revealed how Devin felt that he was credible as a teacher, but once he was a teacher leader he wondered if he had lost his credibility. Jordan also described experiences where teachers were guarded in their dealings with teacher leaders. This makes me wonder whether the teacher leader designation commands any respect from teacher colleagues or whether it does actually the opposite and generates disrespect or resentment of formal teacher leaders. This resentment could be surfacing because teacher leaders are now perceived as administrators or it could be out of anger or jealousy. Probably, the role of teacher leader is respected by some and resented by others. Regardless, the credibility of a teacher leader is important—not only so that other teachers will feel that they should follow the teacher leader but also so that the teacher leader can build up their leadership identity.

The data from my interviews with Lane left me feeling that his experience was not only about living through the experience of a reform initiative as a teacher leader but also about living through the experience of being a teacher leader in a reform initiative while working to become an administrator. It also led me to the question of whether or not the teacher leader positions were being used by the school division as a succession piece to develop a new pool of
administrators. My research suggests that in the teacher leadership roles the participants developed their leadership skills and their identity as a leader flourished—it seems that this would be an opportune context to develop future administrators. However, there is a paradox with this role being viewed as an administrative training ground. The role was intended to empower teachers in a non-administrative role so that they could lead the initiative from the ground level. Katzenmeyer and Moller (1996) found that if these teacher leaders become viewed as administrators in training the influence that teacher leaders have over their colleagues will be diminished.

As neophyte teacher leaders it seemed that these participants also became quasi administrators by default. This was because of the work they were doing which they often described as administrative work. It was also because of how they were perceived by their colleagues. This leads me to the question of whether they took on administrative qualities in this role or whether they had those qualities already and that is what led them to the role of teacher leader. Did the roles change the participants into leaders or did they come to the role with those characteristics? Little (2005) found that the roles and responsibilities associated with teacher leadership influenced the desire to become an administrator. The participants in her study reported wanting to enter administration because they were already doing much of what an administrator did. In my study, Lane was open about his desire to enter administration. With Lane, it seemed that desire was there prior to his role as a teacher leader and the teacher leader role was more a mechanism for achieving his goal. Jordan however, expressed wonder at whether she could bring about more change in a different role—not necessarily as an in-school administrator but in a different administrative capacity. Devin also felt powerless at times as a teacher leader. He used his personal connections with administrators (in-school and at a division
level) to satisfy his desire to operate as an administrator, encouraging them to make decisions that he felt would be beneficial for the reform.

The participants explained that when the reform initiative was developed by the central office administration of Ford Park Schools it was not intended that the teacher leader role would be a training ground for administrators. Despite this though, it seemed that the teacher leader roles in the reform initiative of Ford Park Schools was a training ground for administration in some cases. Little (1995) found that teacher leaders pursue administration because they get to see more things from an administrator’s perspective and they enjoy that feeling of knowing what is happening at the school. Perhaps this desire to enter administration comes from the frustration of being a teacher leader but not really having any power. Little (1995) found that there is frustration because teacher leaders are perceived as administrators, they have some of the responsibilities of administrators, but they do not have any of the power of administration.

The leadership personas of these teacher leaders influenced how they carried out their role. As a leader, Lane appeared to be focused on his moving up through the organization. Conversely, Jordan and Devin seemed primarily concerned with moving the entire group forward to adopt what was best for the organization. Lane seemed to approach the initiative differently than Jordan and Devin. Often, he referred to the initiative as separate from his experience. He also seemed to focus on the managerial side of his experience as a teacher leader. His descriptions tended to the organization of events and professional development rather than the instructional leadership of being a teacher leader and what the systemic change was like and why it was important. He saw the initiative as a thing separate from his school and role as a teacher leader rather than as a lens through which to view everything in his school and role. His focus was not the deep change as with Devin and Jordan. Instead, his focus was moving forward,
being positive and being credible and effective. This is in contrast to Devin and Jordan who were focused on improving the entire system. Their motivation was to make the system better for kids. In contrast, Lane was not concerned with his students as much as he was concerned with his colleagues and how they perceived his leadership. Jordan and Devin were more concerned with the bigger picture rather than how they were perceived by others. Jordan’s conversations with her colleagues and students energized her to continue on in her role.

Similarly, Devin’s learning and understanding of the reform initiative from conversations with colleagues sustained his desire to lead and energized him. For Lane, feeling that he was successful seemed to be what energized him. All three participants brought different leadership personas to their role and this impacted their leadership identity in different ways.

My study has left me with the idea that organizations cannot just distribute leadership and expect that it will be successful. There needs to be a greater understanding of how the leaders come to understand their own leadership identity. Teacher leaders need to understand who they are as leaders and why they react in the ways that they do. The teacher leaders in my study came to understand who they were and developed their identity as a leader over time. Perhaps if they had been given some sense of what a leader undergoes as they lead they would not have struggled as much. If they had a more developed understanding of leadership identity and adaptive change they may have had more opportunity for informed self-analysis. Although they may have struggled with the tensions associated with adaptive change and developing their identity they may have taken solace in understanding the process and knowing that it was normal.

In addition, an understanding of how leadership identity develops may be beneficial to central office administration and in-school administrators who have distributed leadership. Then when tensions occur, administrators may be better suited to facilitate these tensions. The teacher
leaders need to be able to understand their own ponderings about leadership and those who have distributed leadership need to be aware of the pondering the teacher leaders are doing.

**Struggling Through Praxis**

For the purposes of understanding this idea, a discussion of the concept of praxis is necessary. Hodgkinson (1983) utilized Aristotle’s teachings on humankind’s three ways of knowing, approaching, or acting in the world: *theoria*, *techné*, and *praxis*. Hodgkinson found that *theoria* (or theory) and *techné* (or practice) to be commonly understood. However, he found that “the dichotomy between theory and practice [is] so well entrenched in modern society that it has led to some dangerous divisions in professional life” (p. 55). Hodgkinson asserted that an understanding of praxis is missing. Praxis “suggests a duality in action, two ‘moments’ of consciousness or reflection on the one hand and behaviour and commitment on the other” (p. 55). In praxis, conduct is purposeful, ethical and a blend of theory and practice (Hodgkinson). “It is, as is administration, philosophy-in-action” (p. 56). In my study, the participants seemed to be in a state of praxis as they made sense of their experiences. They reflected on them, acted purposefully and with the welfare of their colleagues, students and society in mind. Their sense making was reminiscent of the findings of Lambert (2003): “When actively engaged in reflective dialogue, adults become more complex in their thinking about the world, more respectful of diverse perspectives, more flexible and open toward new experience” (p. 423). This reflection led to learning “through the processes of meaning and knowledge construction, inquiry, participation, and reflection. Leadership can be understood as the enactment of such reciprocal, purposeful learning in community” (p. 423). Lambert’s view of leadership as a form of learning is especially relevant for this study. It was the process of learning, understanding,
reflection and acting where the participants did their leading. It was their experiences in praxis that helped the participants to *enact* their learning.

As they learned, communicated, acted, and reflected the participants became cognitively changed. During their experiences as teacher leaders, there was a larger intellectual transformation happening, one that the teacher leaders in this study did not necessarily perceive. They looked at their craft and spoke about their experiences from the lens of a practicing teacher. They explained how they felt but they did not know the intensity of what was actually happening to them cognitively. All the while, the euphoria of empowerment seemed to create a cognitive change in them. I think that their reflections resulted in a growth in their maturity as leaders and a deeper understanding of how to lead. I found my participants needed to be frustrated before a feeling of empowerment could occur. The participants needed to practice and fail and then think about it, reflect, make changes and then try again. This process seemed to eventually give way to a feeling of empowerment. Though it seemed as though they needed to experience tensions and frustrations while doing this.

The data presented in Chapter 4 revealed experiential contrasts: experiences associated with frustration and experiences associated with success. It seemed that the successful experiences all derived somehow from the frustrations. Jordan experienced tensions when she first began conducting professional development sessions. However, she came to enjoy this tension and saw it as an opportunity for growth which in turn empowered her. Lane was frustrated by his colleague’s comments about the professional development he had planned and led. However, he came to feel successful because of the changes he made after this conversation. Devin felt frustrated by the entire initiative and what he felt was a lack of a framework. Coming to understand the vision of the reform by engaging in reading and learning was empowering for
him and helped him to become a lifelong learner. The results of the study imply that there is a stage of frustration first before success is experienced.

Festinger’s (1957) theory of cognitive dissonance indicated that people resist change because it requires them to admit that their current practices or ideas are incorrect. As these participants came to understand that they needed to make changes in the way they thought or did things they were able to get past the cognitive dissonance and make changes. The data suggests that cognitive dissonance was not only occurring for teacher leaders but also for their teacher colleagues. The participants described several experiences where teachers resisted the reform because they felt threatened by it or they felt it did not acknowledge their talents. However, these same teacher colleagues often came to discover the value in the reform and professed to the teacher leaders in their building that they now understood that what they had been doing was not what was best for students. It seemed that discomfort was what made change possible for the teacher leaders and also for their teacher colleagues; this led me to the finding that in the context of high school reform, discomfort is often a precursor to change. Fullan (2001) referred to the discomfort associated with change as *disturbance* and cautioned that leaders must allow and encourage these disturbances to surface and must also guide people through these disturbances.

**“Getting It”**

Something that was particularly interesting that arose from the participants’ descriptions was their common use of the term “getting it”. All three of the participants referred to this understanding that occurred for them or their frustration with it not happening in their colleagues. The participants referred to it in these ways: he didn’t get it; they weren’t there yet; now I’ve got it. This led me to wonder what “it” was. When I asked the participants to describe “it” for me in subsequent e-mails and telephone conversations they spoke of understanding what the reform
was about and seeing that there were problems with how educators traditionally “did” school. They spoke of coming to a realization that students needed more feedback, choice, and needed to be authentically engaged in their learning. Certainly, this type of change is an adaptive rather than a technical change. Admittedly, Devin said it took him four to six months to “get it”.

Similarly, Lane said it took him almost a year to understand the reform initiative. This makes me realize just how difficult this type of change is. Heifetz and Linsky’s (2002) finding seems particularly relevant here: Given the deep change and the new learning required in this reform, more resistance should be expected. Therefore, those who lead are in more danger of experiencing resistance and backlash (Heifetz & Linsky). These participants were open to change and were eager to see change occur and their new roles as teacher leaders may have increased their openness to change even further. However, it still took them a significant length of time to understand and develop a framework. This process of understanding was also benefited by extra time provided by the school division and a great deal of resources in books and professional development. The participants were then tasked with bringing this message to other teachers. At times this was intimidating because of the resistors and closed mindsets they were leading. This implies that “getting it” may be even more difficult for the teacher colleagues they are leading, as they are not provided with the same extra time and resources and also may not be as open to change.

Ford Park Schools provided the teacher leaders in this study with the professional development to understand the philosophy of the reform initiative related to engaging students in their own learning. However, at the outset of the reform, an understanding of change theory and leadership identity was not included in the professional learning for these teacher leaders. Ford Park Schools provided continuous professional development in learning and assessment models
for teacher leaders, English language arts teachers, mathematics teachers, and learning coordinators. In a similar vein, Darling-Hammond (2009) and Hopkins (2007) found that successful reform initiatives invest in teachers’ knowledge and capability by providing them with relevant, continuous professional development. The teacher leaders were deeply involved in this professional learning and then distributed it to their teaching colleagues. Black and Wiliam (1998) identified that moving to formative assessment is desirable in a reform initiative, and this was a focus in professional development and in learning communities in Ford Park Schools. To support teacher leaders, Ford Park Schools provided release time, extensive professional development opportunities, and collaboration opportunities with other teacher leaders. The formal teacher leaders met as a group regularly at a central location for professional development opportunities, decision making, and planning. These conditions of collaborative, continuous professional development in formative assessment led the participants to coming to understand the philosophy of the reform. Perhaps by giving teacher leaders knowledge of change theory they would come to a more profound understanding of their learning. The participants spoke about how change was difficult and it was a long process. However, they needed something to work through this difficult and lengthy process; perhaps an understanding of change theory would have helped them to do that.

The results of my study led me to wonder if “getting it” could be accelerated if the teacher leaders had a chance to understand change theory. Would a deeper understanding of change theory and the cognitive change that occurs in adaptive changes help them to make sense of their experiences? Perhaps professional development in divisions attempting similar reform initiatives should include learning about change, leadership, leader identity, reflection, and how to make sense of what you are learning. For teachers to make sense of their experiences they
were engaging in some deep cognitive change. To “get” the initiative and the vision…to “get” their role and their leadership style there was a lot of understanding happening here. Perhaps giving teachers change theory or theory on leadership identity would be beneficial in these types of reforms that rely on teacher leadership. As the teachers came to “get it” they became more tolerant of their experience and became more comfortable in their role as leader. Giving them more tools to help them get there would likely benefit the reform. There is a great emphasis in the field of education on encouraging metacognition in student learning, emphasizing the importance of having students think about their own thinking. It seems that getting teachers to think about their own professional learning and how they came to understand those concepts might be similarly as powerful.

**Discussion Summary**

My study brought forward additional concepts that are important for the phenomenon of teacher leadership: culture and context for adaptive change, leadership personas, struggling through praxis, and “getting it”. There are several forces that impact the experience of teacher leadership and facilitate the formation of teacher leadership identity. Through the process of making sense of their experiences, teacher leaders engage in learning, communicating, doing, and reflecting. This process results in “getting it” and is the struggle through praxis. The ways in which teacher leaders make sense of their experiences are influenced in part by their leadership persona and in part by the culture and context within which they live. The culture and context of the teacher leaders sometimes can create frustrations and tensions that weigh down teacher leaders and sometimes the culture and context of the teacher leader can support and build identity and empowerment. These ideas which I have termed the experience of cognitive change are conceptualized in Figure 3. This conceptualization builds upon Figure 1 which was
presented in Chapter 4 that depicted the process of sense making. In addition, the other forces that impact teacher leaders which have been discussed here are included in the representation.

Figure 3 reveals the complexity of leadership identity for the teacher leaders in my study. The concepts in this table reveal a number of implications for how to improve supports for teacher
leaders and how to support teacher leaders in their work. It also raises a number of implications for theory, practice and research that will be examined in the next section.

**Implications**

My study has implications for theory, practice, and research. The implications in each of these three areas are presented in the sections that follow.

**Implications for Theory**

The literature on school reform and teacher leaders’ roles in school reform does not seem to address the changes that come with leadership and how leadership identity is formed. Some researchers have found that teacher leadership is necessary for effective reforms and that distributing leadership is an effective way of encouraging teacher leadership (Elmore, 2000; Katzenmeyer & Moller, 1996). However, the questions that arose from this study imply that more needs to be learned about the leadership identity of the teacher leaders leading the reforms. For example: How does leading impact teacher leaders? How do they become changed? Do cognitive changes occur for them as they lead? What do different leaders bring to the role? Does it matter what the leader’s orientation to leading is? Some research has identified the characteristics of effective teacher leaders (Leithwood et al., 2007; Lieberman & Miller, 2004; Patterson, 2001; Rosenholtz, 1989) but missing is an analysis of how teachers develop and come to understand their leadership skills in the role of teacher leader. Like students in a classroom, teachers are learning in their new role as teacher leader. This study identified that cognitive change seems to be occurring as teacher leaders make sense of their experiences; future studies might try to understand these cognitive changes. Currently, it seems that the cognitive impact of
becoming a leader is missing in the literature reviewed for this study on school reform, distributed leadership and teacher leadership.

**Implications for Practice**

This study also revealed implications for practice. Teacher leaders should be provided with opportunities to reflect on their experiences and to discuss them with others as this is how they make sense of them. This means that school divisions need to build time for reflection and collaboration into their structures. In addition, my study found that providing teacher leaders with the theory on change and leadership identity may help them to understand their experiences more quickly and may help to ease the frustrations they experience in their role. This means planning professional development that is focused on change praxis and on leadership praxis. An additional implication for practice is for school divisions to build in supports that develop and encourage instructional leadership in administrative teams.

**Implications for Future Research**

As the phenomenon of teacher leadership was revealed by the participants in the interviews and the data was reduced and analyzed, more questions about the phenomenon arose. In addition, the processes of collecting protocol writings and engaging in phenomenological research left me with further questions about my research methodology. Implications for future research that arose from this study include the following possible research questions:

- Are formal teacher leaders more likely to aspire to an administrative role?
- Are formal teacher leaders more likely to succeed in their aspirations to administration?
• How do teachers perceive teacher leaders in their buildings? Do they perceive them as quasi-administrators and/or as a supportive colleague?

• What cognitive changes occur for neophyte teacher leaders?

• Does focusing professional learning for administrators on instructional leadership ease the tensions experienced by teacher leaders with their administrators?

• How do formal teacher leader roles help school divisions to plan for leadership succession?

• In what ways are participant reflective writings an effective way of collecting data?

• How is the transcription of interview data analogous to self-meditation for phenomenological researchers?

Examining the phenomenon of teacher leadership using the qualitative method of phenomenology encouraged the asking of new questions. This questioning and reflecting has resulted in a number of possible directions for future research.

**Reflections of a Phenomenological Researcher**

To this point in this chapter I have discussed the interesting and emerging concepts that emerged from this study and implications for future theory, practice, and research. I feel it is also critical to reflect on my experiences as a phenomenological researcher so that other researchers using phenomenology might see where I encountered difficulties or what techniques I found to be particularly useful in my research.
As I went through the process of selecting participants and then collecting the data I felt that there was a great deal of data within the protocol writing pieces that was relevant to my study. As I wrote Chapter 4 I wished that I had planned to use the protocol pieces as data to be analyzed. I felt that there were many experiences in the protocol writing pieces that supported what the data from the interviews was saying. The language that the writers used in their pieces was eloquent and compelling and I felt the urge to include it in my presentation of results. I did not analyze the pieces. However, I felt that there was so much in these pieces that they needed to be included somehow so they became a preface to the presentation of the results.

I found that the interviews became easier to conduct as I went through my research. I think that practicing interviews with each of my pilots was helpful to me as a researcher. After each pilot interview, the initial questions were reframed and retooled to elicit responses about the experience of being a teacher leader. My research advisors were consulted and the pilot data was shared with them. We looked at the questions and sharpened them. At this point we also clarified how the transcripts would be used after the interviews and what questions needed to be answered. The pilot interviews also served as an important opportunity to practice the technique of interviewing. I felt that I was quite comfortable with the format of a long open ended interview when the official research began.

The assertion that “it is impossible to offer ready made questions” (van Manen, 1990, p. 67) proved to be true. Although four broad questions were developed for use in the first interview, I found that the questions that drew the most descriptive responses were those that were developed in response to the participants’ responses. I also found that I did not need to ask a lot of questions to elicit data rich responses. This was especially true with one of the participants. I found van Manen's (1990) suggestion of repeating the person’s last sentence or
thought with a questioning tone was helpful in allowing the participant to continue reliving the experience without my leading them in a direction. In addition, “patience or silence [was] a more tactful way of prompting the other to gather recollections and proceed with a story” (p. 68). I felt very comfortable during the interview process and I believe that the participants did as well. They did not seem guarded at all and also seemed very attuned to my methodology of phenomenology often returning to their experiences and perceptions in their descriptions without my direction. I also found that as van Manen (1990) suggested, interviewing served two purposes in my research. It enabled me to gather data that contributed to my understanding of teacher leadership and it was a way of connecting with the participant.

I conducted the first three interviews and then looked at each of the transcripts for these interviews in detail. From each transcript I highlighted the passages that I wanted more information or detail about. My questions for the second interview came out of these experiences that needed further description. In some cases I would read back what the participant had said and then ask them a follow up question about that experience. For example: What were you thinking when this happened? Can you tell me more about this experience? In other cases, new questions about the experience arose and they were asked. During both the first and second interviews there were new questions that were asked as a result of where the participant took the interview. These questions were not prepared in advance. Instead they were developed during the interview and were asked in order to develop a full understanding of the participant’s experience.

Data analysis occurred throughout the data collection phase. I noticed things during the interviews and during conversations with people. My observations influenced my collection of data as the research went on and it also influenced my questions. As I collected more data I
thought about what I had learned and reflected on my process and the results. This led to more questions. The data were not formally “mined” or “coded” at this point, but the process of analysis had inherently begun.

As I progressed through this study I found my understanding of bracketing, phenomenological reduction and imaginative variation to be quite theoretical. I understood what the terms such as bracketing, horizonalization, textural description, and systematic variation meant and felt that I had an understanding of how to carry them out. However, when I was faced with attempting to conduct phenomenological reduction during my pilot study (as my research proposal indicated) what I came to realize is that phenomenological reduction is not a thing that is conducted. The data cannot be not treated with phenomenological reduction or imaginative variation. Instead, a philosophical understanding oriented me so that the processes of phenomenological reduction and imaginative variation transpired naturally without a series of steps being carried out. To deepen my philosophical understanding I returned to the research of van Manen (1990), Moustakas (1994) and Creswell (2007). From there I reached back even further to the philosopher Husserl and his philosophy of phenomenology. The ideas of Husserl as interpreted by Fink (1995) greatly aided my understanding of the philosophy of phenomenology.

Fink (1995) found that self-meditation was an ideal state for the process of phenomenological reduction. For me, transcription was similar to self-meditation and upon reflection I believe that this was when phenomenological reduction happened for me. I found myself subconsciously experiencing the descriptions and stories of the teacher leaders. The essence of being a teacher leader was implicit in the words of the participants. As I transcribed, re-read interviews, and planned for my next interviews phenomenological reduction and
imaginative variation brought those essential experiences to the surface. Going through the phenomenological reduction prepared me to be a phenomenologist.

I was unable to transcribe when my mind was clouded with issues in my own personal life such as selling property or career changes. No matter how hard I pushed, it was difficult to transcribe and it felt forced and unnatural. However, when these issues were resolved I found the transcription to be easy, natural and invigorating. I felt the words of the interviewees wash over me and felt like I was in tune with the experience of teacher leadership. I was able to hold my own experiences aside and live in theirs without comparing them to my own. However, I found I was still able to draw on my own experiences when necessary.

As I went through the process of engaging in research and writing this thesis, I went through a cycle of making sense similar to the teacher leader participants in my study. I read to develop an understanding of school reform, distributed leadership, and teacher leadership. I communicated with my research advisors, my colleagues, the participants in my study, and my family and friends to make sense of the experience of researching and writing a thesis. These experiences included frustrations (delays in collecting data and difficulties with the writing process) and successes (finding studies that answered my questions about teacher leadership and receiving ethics approval). Talking to others about these experiences and reflecting on them helped me to make sense of them and gave me the energy to take action and continue to move forward through the process of researching and writing. Questions about my research and my methodology continued to arise for me. In fact, questions, reflections, and connections continue to surface for me. When I reflect on this process I see that I too have undergone a cognitive change. My understanding of phenomenology has deepened and is an inherent part of me now rather than a theoretical understanding. My understanding of teacher leadership and adaptive
change has also deepened and I see how teacher leaders can be influential in reforming systems if they are supported appropriately.

**Concluding Comment**

In Ford Park Schools, being a teacher leader meant negotiating tensions and supports. It meant engaging in professional learning through reading, listening, and talking to understand the purpose and vision of the reform. It meant spreading the message of reform to colleagues and administrators through communication, coaching, modeling and teaching. It meant feeling frustrated at times but feeling empowered at others. Being a teacher leader meant engaging in a circular journey of making sense of new learning and experiences and engaging in deep reflection. Being a teacher leader in Ford Park Schools was a transformative experience.

To me, being a phenomenological researcher meant reflecting on my experiences openly and honestly to find out what I wanted to know more about. It meant putting aside my own beliefs and judgments as I listened to my participants. It meant being honest with myself and the participants about the process of phenomenology. It meant treating everything as valid. It meant reducing the data with no end goal in mind even though that may have taken longer. It meant opening myself up to a journey. It meant looking for guidance, advice and checking my interpretations. It meant coming to a deep understanding of the essence of teacher leadership and developing a warm feeling of respect and admiration for my participants. It meant opening up the lives of these teacher leaders to the educational and research communities. It meant learning more about writing and critiquing my ideas. It meant trusting my instincts about the findings I made and the conclusions I was drawing. Being a phenomenological researcher was a transformative experience.
In system reform initiatives, utilizing distributive leadership in the form of teacher leadership is more than initiating reforms and programs that are conceived to be best practice. It is instead implementing these reforms and initiatives with the knowledge that the learning is challenging, deep, and it will take time and require support. This support might mean that in-school and central office administrators check with teacher leaders to see what they need and what their tensions are. It may require teaching teacher leaders about cognitive change and encouraging them to celebrate their growth and pass that learning onto others. It surely requires doing as Elmore (2000) suggested, and viewing daily work and making decisions about teaching and learning through the lens of instructional leadership. Teacher leadership is a “sleeping giant” (Katzenmeyer & Moller, 1996); in order to awaken this potential it needs to be enacted thoughtfully, monitored frequently and supported continuously.
REFERENCES


APPENDICES

Appendix A:
Application for Approval of Research Protocol
Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools

3. **Abstract (100-250 words)**
   The purpose of this study is to examine the experiences of teacher leaders who have been involved in a teacher leadership initiative in the context of an effective high school reform initiative. Using a phenomenological lens, the goal is to conduct an inquiry into the essence of teachers’ lives as teacher leaders. Creswell (2007) described the appropriate conditions for a phenomenological approach to research: “The type of problem best suited for this form of research is one in which it is important to understand several individuals’ common or shared experiences in order to develop practices or policies, or to develop a deeper understanding of the features of the phenomenon” (p. 60). A deeper understanding of teacher leadership in the context of high school reform will enable educators and policy makers to make more informed decisions about the development of teacher leader programs, the supports needed for effective teacher leadership, and a greater understanding of what it means to be a teacher leader. The following research questions will focus the study:
   1. What are selected teacher leaders’ experiences in high school reform initiatives?
   2. In the context of an effective reform initiative, how do participating teacher leaders perceive their roles?
4. **Funding**
   This study will be funded by the student.

5. **Expertise**
   This research does not involve special or vulnerable populations, distinct cultural groups, and is not above minimal risk, so expertise is not applicable for this study.

6. **Conflict of Interest**
   There is not a potential for conflict of interest in this study.

7. **Participants**
   Purposeful sampling will be used to select study participants. To facilitate purposeful sampling in this study, once permission to access the school division has been obtained from the school division, the researcher will ask permission from a superintendent to contact the formal teacher leaders working in the division by e-mail and telephone. Initially, the formal teacher leaders will be contacted by e-mail, and will be presented with a letter of invitation to participate (see Appendix B). Then, the formal teacher leaders will be contacted by telephone. This conversation will be an opportunity to further explain the study and clarify any questions the potential participants might have. At this point, if the potential participants agree, a second e-mail will be sent to individuals. The e-mail will contain information about giving informed consent (see Appendix C) by agreeing to complete a short reflective paragraph about their experience as a teacher leader using a writing prompt (see Appendix D). Participants would e-mail their response to the researcher. If the teacher leaders prefer to complete the protocol writing exercise in person, the researcher will conduct the protocol writing exercise at a place and time of their choice. The paragraph will be used to select participants for further interviews, as well as to provide the researcher with a context for the person’s experience prior to conducting interviews. Participation in the writing will be optional, without coercion, and participants’ informed consent will be obtained. This will be facilitated by the researcher only (with no one from the school division present). Following the selection of potential participants for interviews, selected participants will be asked to give consent using the study information letter and consent form (see Appendix C). To begin, three participants will be selected. Should additional interviews be required, participants will be chosen from the original paragraphs and the process of consent to participate in the complete study will begin once again.

7a. **Recruitment Material**
   A sample of the recruitment material that will be used in this study is included as Appendix B.

8. **Consent**
   With the permission of the school division (letter requesting permission included in Appendix C), potential participants will be introduced to the study by e-mail and telephone. By completing and returning the protocol writing participants will indicate their consent to participate in the study (as explained in the informed consent form in
Appendix C). Once the interview participants have been selected, they will be asked to sign the informed consent form for participation in the study included in Appendix C.

9. **Methods/Procedures**
This is a phenomenological, qualitative study. Data will be collected from participants through multiple interviews, e-mail correspondence and in conversation. The data will be recorded and transcribed. In conducting phenomenological research, Moustakas (1994) recommended making the interviews “an informal, interactive process” with “open-ended comments and questions” (p. 114). A set of questions has been developed that attempt to encourage a complete sharing of the experience of teacher leadership (included in Appendix D), but as Moustakas suggested, they will be “varied, altered, or not used at all” (p. 114) depending on the direction the participant takes the interview. The data will be analyzed using the approaches advocated by Moustakas (1994) and Creswell (2007): phenomenological reduction (textural description), imaginative variation (structural description), and synthesis (composite description – the essence of the phenomenon). The data will be presented with careful consideration of the privacy and anonymity of the participants.

10. **Storage of Data**
Once the study has been completed, all data (tapes, transcripts, correspondence, electronic files, and researcher notes and drafts) will be securely stored and retained by Dr. Patrick Renihan, and Dr. Michelle Prytula of Educational Administration in the College of Education in accordance with the guidelines defined by the University of Saskatchewan. The data will be placed in a locked cabinet for a minimum of five years and will be stored for five years after completion of the study. After this time, the data will be destroyed.

11. **Dissemination of Results**
The data and results from this study will be used in thesis in partial fulfillment of a masters degree. Results from the study may also be used in presentations to educators or may be submitted in an article for publication. In all dissemination of results, fictionalized names, locations, and events will be used to protect the anonymity of participants.

12. **Risk, Benefits, and Deception**
The potential benefits of this study include an understanding of the essence of the experiences of teacher leaders. A deeper understanding of teacher leadership in the context of high school reform will enable educators and policy makers to make more informed decisions about the development of teacher leader programs, the supports needed for effective teacher leadership, and a greater understanding of what it means to be a teacher leader.. Deception will not be used in this study. Participants will not be exposed to harm, discomfort, or perceived harms. There is the possibility that participants may share information which may put the participant or a third party at risk, if their identity was compromised. For example, a teacher leader may make negative comments about their administrator, colleagues, or
central office staff – this could damage the reputation of a third party, and it could put the teacher leader’s career in jeopardy. Names and locations will be changed to protect the anonymity of the participants, and extra care will be taken when reporting vulnerable segments from interviews. As well, when approving interview transcripts, participants will be able to make changes if they feel that the information contained in the transcript could compromise their or a third party’s anonymity, or damage reputation. Participants are able to withdraw from the study at any time.

To assess the degree of risk involved in this study, I have considered the following questions:

a) *Are you planning to study a vulnerable population?* This would include, for example, people who are in a state of emotional distress, who are physically ill, who have recently experienced a traumatic event, or who have been recruited into the study because they have previously experienced a severe emotional trauma, such as abuse. Formal teacher leaders are not a vulnerable population.

b) *Are you planning to study a captive or dependent population, such as children or prisoners?*
Formal teacher leaders are neither captive nor dependent.

c) *Is there an institutional/ power relationship between researcher and participant (e.g., employer/employee, teacher/student, counsellor/client)?*
The relationship is colleague to colleague; a power relationship does not exist.

d) *Will it be possible to associate specific information in your data file with specific participants?*
Special attention will be taken to ensure that the information in the data file cannot be linked to specific participants.

e) *Is there a possibility that third parties may be exposed to loss of confidentiality/ anonymity?*
Exceptional care in the reporting of the results will ensure that third parties will not be exposed.

f) *Are you using audio or videotaping?*
Interviews will be audio-recorded. Only the researcher will hear the interviews. Participants will have the opportunity to read the interview transcripts, and they will be asked to make changes if they believe there is information in the transcripts which compromises their or a third party’s anonymity. When the final transcript is agreed on, participants will be asked to sign a transcript release form.

g) *Will participants be actively deceived or misled?*
Deception will not be used in this study.
h) **Are the research procedures likely to cause any degree of discomfort, fatigue, or stress?**
   The research will be conducted as a conversation between colleagues; no discomfort, fatigue, or stress should occur during the research. The interviews will not be arduous. It is anticipated that each interview will last less than one hour.

i) **Do you plan to ask participants questions that are personal or sensitive? Are there questions that might be upsetting to the respondent?**
   The interviews will be open-ended, and directed by the participants. Upsetting questions are not planned.

j) **Are the procedures likely to induce embarrassment, humiliation, lowered self-esteem, guilt, conflict, anger, distress, or any other negative emotional state?**
   The research is unlikely to induce a negative emotional state in participants.

k) **Is there any social risk (e.g., possible loss of status, privacy or reputation)?**
   Careful consideration in reporting results will prevent the possible social risk of loss of privacy.

l) **Will the research infringe on the rights of participants by, for example, withholding beneficial treatment in control groups, restricting access to education or treatment?**
   There are no control groups in this research. The rights of participants will not be infringed upon.

m) **Will participants receive compensation of any type? Is the degree of compensation sufficient to act as a coercion to participate?**
   The participants may receive a small thank-you gift once the research has been completed. The gift will be a thank-you for their time and contribution, and will not serve as a coercion tool for participation.

n) **Can you think of any other possible harm that participants might experience as a result of participating in this study?**
   I cannot think of any other possible harm that participants may experience from this study.

13. **Confidentiality**
   The participants are being selected from a small group who are likely to be known to each other, and to those who may read the final study. To protect the confidentiality and anonymity of participants and third parties, pseudonyms will be used for names, locations, programs, and events. Aggregate results will be reported to avoid identification of particular participants through scenarios and stories. Direct quotations will be used in the results (quotations will be carefully chosen so as not to identify the participant), but the quotation will not be attributed to the specific participant. Participants will be informed of the potential risk of participating in the study, and will be asked to sign a transcript release form.
14. **Data/Transcript Release**
Participants will be provided with the opportunity to withdraw their responses after their interview and prior to the publication of the findings. Participants will be asked to review the final transcript and sign a transcript release form wherein they acknowledge by that the transcript accurately reflects what they said or intended to say. This form is included in Appendix C.

15. **Debriefing and feedback**
Following their involvement, participants will be provided with information on how the researcher may be contacted if they have questions or concerns. As well, participants will be sent a brief executive summary of the results when the research is completed, and an electronic copy of the completed research will be provided to the participants upon request.

16. **Required Signatures**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colleen Norris</td>
<td>Student</td>
</tr>
<tr>
<td>Dr. Patrick Renihan</td>
<td>Supervisor</td>
</tr>
<tr>
<td>Dr. Michelle Prytula</td>
<td>Supervisor</td>
</tr>
<tr>
<td>Dr. Sheila Carr-Stewart</td>
<td>Department Head</td>
</tr>
</tbody>
</table>

17. **Required Contact Information**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
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<tbody>
<tr>
<td>Colleen Norris</td>
<td>Student</td>
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</tr>
<tr>
<td>Dr. Sheila Carr-Stewart</td>
<td>Department Head</td>
</tr>
</tbody>
</table>

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(306) 966-7611  
sheila.carr-stewart@usask.ca
Appendix B:
Introductory Letters and Recruitment Material
Letter of Invitation to Participate in Protocol Writing

Colleen Norris, M.Ed. Candidate
Department of Educational Administration
College of Education
University of Saskatchewan
28 Campus Drive
Saskatoon, SK S7N 0X1

March 31, 2010

RE: LETTER OF INVITATION TO PARTICIPATE IN PROTOCOL WRITING

Dear [teacher leader],

My name is Colleen Norris, and I am a M.Ed. candidate with the Department of Educational Administration at the University of Saskatchewan. My study is titled Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools.

The purpose of the study is to examine the experiences of formal teacher leaders who have been involved in the context of a high school reform initiative.

At this stage of the research, I am selecting participants. To facilitate the selection of participants for the study, I am hopeful you will consent to a protocol writing activity. In a short paragraph, I will ask you to share stories and experiences that you have had through your role as a teacher leader. I anticipate that the process will take between 10 and 20 minutes to complete. You would be able to withdraw from the participant selection phase of the study at any time. If protocol writing is included in the study, all names and locations will be given pseudonyms. Direct quotations may be used as supports to the themes, however, teacher name and location pseudonyms will be used in the quotes.

Following this activity, I may contact you again to ask you to be a participant in the main study. At that time, I would present you with further information about that phase of the study, and ask you to sign an informed consent form. Should you wish, you could decline to participate in the second phase of the study.

Participating in this activity will facilitate participant selection for the main part of the study, and will provide valuable information for literature, theory and practice. A deeper understanding of teacher leadership in the context of high school reform may enable educators and policy makers to make more informed decisions about the development of teacher leader programs, and the supports needed for effective teacher leadership. As well, it is hoped that this study will encourage a more complete understanding of what it means to be a teacher leader.
Your cooperation in the participant selection phase of *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools* would be greatly appreciated. If you have any questions or concerns about this writing activity or the main study, please contact me by e-mail at norrisco@spsd.sk.ca or by telephone (249-4351). Thank you, in advance, for your consideration and cooperation in participating.

Respectfully yours,

Colleen Norris  
M.Ed. Candidate  
University of Saskatchewan
Initial E-mail Informing Participants of Study

From: Norris, Colleen
Sent: Monday, April 12, 2010 12:03 PM
To: 
Cc: 
Subject: Selection of Teacher Leader Participants for Research

Dear [teacher leaders],

Attached to this e-mail is an invitation to participate in the participant selection phase of my research study titled *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools*. The invitation is attached in a rich text format and as a pdf file. Also attached is a copy of a letter of approval from the [school division]. I hope you will consider participating.

The intention of this e-mail is to let you know in advance that I will be contacting you personally by telephone at your school during the month of April. The purpose of my call will be to further explain the protocol writing exercise, to clarify any questions you might have, and to find out if you are willing to participate.

I hope you had a relaxing break, and I look forward to speaking with you in the coming weeks.

Respectfully yours,
Colleen Norris
M.Ed. Candidate
University of Saskatchewan
Sample of Second E-mail with Information on Protocol Writing Phase of Study

From: Norris, Colleen
Sent: April 14, 2010 2:10 PM
To: 
Subject: Protocol Writing Exercise

To follow up on our conversation from this afternoon, there are three attachments to this e-mail:

1. A brief PowerPoint explaining the rationale of my study and the selection of participants (for your information).
2. The informed consent form for participating in the Protocol Writing Exercise. Please read this document and note that returning your writing by e-mail constitutes informed consent.
3. The protocol writing instructions. I want you to tell me about an experience you have had as a teacher leader. An example of such a lived-experience description, but from the perspective of a mother instead of a teacher leader, is included in this document.

Please e-mail me with any questions or concerns that you might have. If you like, I will arrange a time to come to your school and go through the activity with you.

If possible, please return your written description by **Friday, April 23rd**.

Thank-you for your time and your consideration,
Colleen Norris
May 6, 2010

RE: LETTER OF INVITATION TO PARTICIPATE IN IN-DEPTH INTERVIEWS

Dear [teacher leader],

My name is Colleen Norris, and I am a M.Ed. candidate with the Department of Educational Administration at the University of Saskatchewan. My study is titled *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools.*

The purpose of the study is to examine the experiences of teacher leaders who have been involved in a teacher leadership initiative in the context of an effective high school reform initiative. Using a phenomenological lens, the goal is to conduct an inquiry into the essence of teachers’ lives as teacher leaders in the context of high school reform.

As a participant I will be contacting you initially to ask you questions about your experiences as a formal teacher leader. In a semi-structured interview format, I will ask you to share stories and experiences that you have had through your role as a teacher leader. Following this interview, I will contact you again to ask you questions about what you have already shared with me, to learn more from your experiences. The goal is to explore the experiences of formal teacher leaders in the context of Saskatoon high schools attempting reforms. It is anticipated that three to five interviews may be required, and that each interview will last approximately 45 minutes to one hour. I may also contact you by telephone or e-mail in between interviews for clarification or for short questions. These would be minimal interruptions, and would only occur at your convenience.

This research will provide valuable information for literature, theory and practice. A deeper understanding of teacher leadership in the context of high school reform will enable educators and policy makers to make more informed decisions about the development of teacher leader programs, the supports needed for effective teacher leadership, and a greater understanding of what it means to be a teacher leader.

The information gathered from teacher leaders who participate in this study may be used for presentations at conferences, professional venues, and academic publications. The taped interviews will be transcribed verbatim. You will have the opportunity to review the transcripts, and add, edit or delete any information you would like. After this process, you will be asked to sign a transcript release form. Data resulting from the interviews will be examined for themes.
Direct quotations may be used in presentation of the data, but the case study results will be reported as aggregated (composite) case studies.

Your cooperation in *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools* would be greatly appreciated. If you are interested in participating, please read and sign the attached consent form. If you have any questions or concerns about this study, I can be contacted by e-mail at norrisco@spsd.sk.ca or by telephone (249-4351). Thank you, in advance, for your consideration and cooperation in participating in this study.

Respectfully yours,

---

Colleen Norris, M.Ed. Candidate  
University of Saskatchewan
Appendix C:
Letter Requesting Permission to Access Sample and Consent Forms
Letter for Permission to Access Sample

Dear Coordinator;

Thank you for considering this request to allow me to conduct my research titled *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools*. The purpose of this study is to examine the experiences of teacher leaders who have been involved in a teacher leadership initiative in the context of an effective high school reform initiative. Using a phenomenological lens, the goal is to conduct an inquiry into the essence of teachers’ lives as teacher leaders in the context of high school reform.

I am seeking to conduct in-depth interviews with three formal teacher leaders in your school division. To select participants, I would like permission to attend a scheduled full-day meeting of the formal teacher leaders working in the division, at the convenience of the superintendent and coordinator responsible for this initiative. At this meeting, I will use a writing prompt to ask the teacher leaders who consent to participate to complete a short reflective paragraph about their experiences as a teacher leader. Participation will be voluntary, and this paragraph will be used to select participants for the in-depth interviews. From these initial texts, I will choose three willing participants for the study. I anticipate that these three participants would be involved in several in-depth (45 minute to one hour) interviews throughout the study.

I will take great care to ensure that the privacy and confidentiality of all participants will be preserved using pseudonyms, and will only ask them to participate on a voluntary basis. I will also be as unobtrusive as possible, and will ask each teacher leader to participate outside of regular school hours and at their convenience. All interviews will be semi-structured and recorded. Participants will be made aware of the purpose of the study, and will have the option of withdrawing from the study at any time if they choose.

Each participant will also be provided with a copy of their data and transcripts, as well as a copy of the results of the study. The results will be used for the publication of my master’s thesis, and may also be published in a scholarly journal, used for a professional presentation, or shared at a conference.

I ask your cooperation by allowing me access to these teacher leaders by confirming and signing this form, and, if possible, endorsing/supporting my study to the superintendents and teachers involved. Thank you for your support!

Colleen Norris  
Researcher  
University of Saskatchewan
Informed Consent Form for Participation in Initial Protocol Writing

You are invited to participate in a study entitled *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools*. Please read this form carefully, and feel free to ask any questions you might have.

**Researcher(s):**
- Patrick Renihan, Ph.D. University of Saskatchewan 966-7620
- Michelle Prytula, Ph.D. University of Saskatchewan 966-6880
- Colleen Norris University of Saskatchewan, M.Ed. Candidate

**Purpose:** The purpose of my research is to examine the experiences of teacher leaders who have been involved in a teacher leadership initiative in the context of an effective high school reform initiative. At this stage of the study, I am selecting participants. Commitment to this phase of the study would involve sharing a short written account of stories and experiences that you have had through your role as a teacher leader. It is anticipated that this written account will take 10 to 20 minutes of your time.

**Potential Risks:** Some of the protocol writing samples may be used in the presentation of the data. In this case, all participants will be assigned pseudonyms, and names and locations will be changed to protect the anonymity of the participants. Participants will be able to withdraw from the protocol writing activity at any time, and/or withdraw part or all of their data at any time.

**Potential Benefits:** Participating in this activity will facilitate participant selection for the main part of the study, and that research will provide valuable information for literature, theory and practice. A deeper understanding of teacher leadership in the context of high school reform will enable educators and policy makers to make more informed decisions about the development of teacher leader programs, the supports needed for effective teacher leadership, and a greater understanding of what it means to be a teacher leader.

**Storage of Data:** Upon completion of the study, all data from the protocol writing activity will be securely stored and retained by Dr. Patrick Renihan and Dr. Michelle Prytula in accordance with the guidelines defined by the University of Saskatchewan. The data will be stored for five years after completion of the study. After this time, the data will be destroyed.

**Confidentiality:** If protocol writing is included in the study, all names and locations will be given pseudonyms. The teacher leaders’ names will be removed and replaced with a pseudonym. Direct quotations may be used as supports to the themes, however, teacher name and location pseudonyms will be used in the quotes.

**Right to Withdraw:** Your participation is voluntary, and you may withdraw from the study for any reason, at any time, without penalty of any sort. If you withdraw from the study at any time, any data that you have contributed will be destroyed at your request.
Questions: If you have any questions concerning this initial activity or the complete study, please feel free to ask at any point; you are also free to contact the researchers at the numbers provided above if you have questions at a later time. This study has been approved on ethical grounds by the University of Saskatchewan Behavioural Research Ethics Board on (insert date). Any questions regarding your rights as a participant may be addressed to that committee through the Ethics Office (966-2084). A brief executive summary of the project will be provided to participants upon request.

Consent to Participate: Completing and returning the protocol writing activity indicates your consent to participate in the study described above and that you have been provided with an opportunity to ask questions and that your questions have been answered satisfactorily. You may withdraw this consent at any time.
Informed Consent Form for Participation in In-Depth Interviews

You are invited to participate in a study entitled *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools*. Please read this form carefully, and feel free to ask any questions you might have.

**Researcher(s):**
- Patrick Renihan, Ph.D.  
  University of Saskatchewan  
  966-7620
- Michelle Prytula, Ph.D.  
  University of Saskatchewan  
  966-6880
- Colleen Norris  
  University of Saskatchewan, M.Ed. Candidate

**Purpose:** The purpose of this study is to examine the experiences of teacher leaders who have been involved in a teacher leadership initiative in the context of a high school reform initiative. Using a phenomenological lens, the goal is to conduct an inquiry into the essence of teachers’ lives as teacher leaders in the context of high school reform. Commitment to this study would involve sharing stories and experiences that you have had through your role as a teacher leader. It is anticipated that the study will involve two to four interviews, ranging in duration from 45 minutes to one hour each.

**Potential Risks:** All participants will be assigned pseudonyms, and names and locations will be changed to protect the anonymity of the participants. There is the possibility that participants may share information which may put the participant or a third party at risk, if their identity was compromised. Participants will be able to withdraw from the study at any time. Throughout the interviews, participants have the right to answer only the questions that they are comfortable answering, and they may also request to turn off the recorder at any time. Participants will be asked to review the final transcripts, and will be able to add, alter or delete information that relates to them, and sign a transcript release form wherein they acknowledge by that the transcript accurately reflects what they said or intended to say.

**Potential Benefits:** This research will provide valuable information for literature, theory and practice. A deeper understanding of teacher leadership in the context of high school reform will enable educators and policy makers to make more informed decisions about the development of teacher leader programs, the supports needed for effective teacher leadership, and a greater understanding of what it means to be a teacher leader.

**Storage of Data:** Upon completion of the study, all data (digital tapes, electronic, and paper) will be securely stored and retained by Dr. Patrick Renihan and Dr. Michelle Prytula in accordance with the guidelines defined by the University of Saskatchewan. The data will be stored for five years after completion of the study. After this time, the data will be destroyed.

**Confidentiality:** All names and locations will be given pseudonyms in this study. The teacher leaders’ names will be removed and replaced with a pseudonym. Participants will be asked to review the final transcripts and will have the opportunity to add, alter or delete information
relates to them, and sign a transcript release form wherein they acknowledge by that the
transcript accurately reflects what they said or intended to say. Data resulting from the interviews
will be examined for themes. Direct quotations may be used as supports to the themes, however,
teacher name and location pseudonyms will be used in the quotes as well.

**Right to Withdraw:** Your participation is voluntary, and you may withdraw from the study for
any reason, at any time, without penalty of any sort. If you withdraw from the study at any time,
any data that you have contributed will be destroyed at your request. Throughout the interviews,
you have the right to answer only the questions that you are comfortable answering, and you may
also request to turn off the recorder at any time.

**Questions:** If you have any questions concerning the study, please feel free to ask at any point;
you are also free to contact the researchers at the numbers provided above if you have questions
at a later time. This study has been approved on ethical grounds by the University of
Saskatchewan Behavioural Research Ethics Board on January 22, 2010. Any questions
regarding your rights as a participant may be addressed to that committee through the Ethics
Office (966-2084). A brief executive summary of the project will be provided to participants
upon request.

**Consent to Participate:** I have read and understood the description provided above; I have been
provided with an opportunity to ask questions and my questions have been answered
satisfactorily. I consent to participate in the study described above, understanding that I may
withdraw this consent at any time. A copy of this consent form has been given to me for my
records.

___________________________________  ________________
(Name of Participant)                  (Date)

___________________________________  ________________________
(Signature of Participant)              (Signature of Researcher)

Please provide the phone number you wish to be contacted at: _____________________
Study Title: *Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools.*

I am returning the transcripts of your audio-recorded interviews. Please review and sign the consent for data transcription release.

I ____________________________, have reviewed the complete transcript of my personal interviews in this study, and have been provided with the opportunity to add, alter, and delete information from them as appropriate. I acknowledge that the transcript accurately reflects what I said in my personal interviews with Colleen Norris. I hereby authorize the release of the transcript to Colleen Norris to be used in the manner described in the consent form. I have received a copy of this Data Transcript Release Form for my own records.

____________________________  ______________________
Participant Signature        Date

____________________________  ______________________
Researcher Signature         Date
Appendix D:
Protocol Writing Prompt and Semi-Structured Interview Questions
Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools

Protocol Writing Instructions

Protocol writing is “the generating of original texts from which the researcher can work” (van Manen, 1990, p. 63). The text is a direct account of a personal experience as the writer lived through it. Here is an example of a lived-experience description, provided by a mother, of the daily experience of mothering:

Lately I have been wondering if I expect too much of my son. He gets all mixed up in his homework, is overtired, can’t think straight, and spends hours doing one straightforward assignment when he should just be relaxing and enjoying family life like all the other kids in his class; he has misread the instructions and has to do the whole thing again; he has a thousand ideas for a report on gorillas, but can’t seem to get it together to write even the opening sentence. So yesterday I looked at Robbie’s cumulative-file at school. I felt guilty in a way, resorting to that, especially since those numbers have so little to say about a person. And my love and hopes for him are unconditional of course, they don’t depend on his achievement of IQ scores. But the numbers weren’t supposed to tell me whether Rob is special or not—they were supposed to tell me what to do: whether it is alright for me to tease, prod and cajole him about his homework, and say, “Hey, you lazy schmuck, get some of this work finished in school instead of fooling around,” or maybe, “Of course you can’t think straight when you’re so tired. You’ll have to get home earlier and do this homework before supper.”

Writing Prompt: Please write a description of the major thoughts on an experience you have had as a teacher leader. Describe the experience from the inside, as it happened; almost like a state of mind account. This could be a positive or a negative experience, but should be something you can recall vividly. Include the feelings, the mood, the emotions, etc.

When you have completed the protocol writing exercise, please e-mail your description to me at norrisco@spsd.sk.ca. Your description could be attached in a Word document or could simply be in the body of the e-mail.

If you prefer to handwrite your description, please contact me by e-mail or telephone (249-4351) and I will arrange to pick up your writing from your school at your convenience.
Living within Reform: A Phenomenological Study of the Lived Experiences of Teacher Leaders in High Schools

Semi-Structured Long Interview Questions

Teacher’s Name: ______________________________

1. How did you become involved as a teacher leader? Tell me your story.

2. What have been your experiences as a teacher leader?

3. What circumstances or conditions have influenced or shaped your experiences of being a teacher leader?

4. Think of a specific instance, situation, person, or event from your experience as a teacher leader. Then explore and describe the whole experience to the fullest.