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International Studies in Educational Administration (ISEA) aims to enhance the effectiveness of educational leadership, management and administration to support intellectual, personal and social learning in schools, colleges and universities and related educational, social and economic development in a range of national contexts. It publishes research- and scholarship-based papers within the broad field of educational leadership, management, and administration including its connections with educational/social policy, and professional practice. It focuses on the Commonwealth and beyond. It is strongly international in that, while it may publish empirical research or scholarship undertaken in specific national or regional contexts, papers consider issues and themes of interest that transcend single national settings. Papers offer new facts or ideas to academics, policy-makers and practitioners in education in varied national contexts ranging from advanced economies to the least economically developed countries. The journal aims to provide a balance between papers that present theoretical, applied or comparative research, and between papers from different methodological contexts, different scales of analysis, and different access to research resources. Editorial Correspondence and Books for Review should be sent to the Editors. Business Correspondence should be sent to the President or the CEO. ISEA adopts review procedures common to highly regarded international academic journals. Each paper is reviewed by the editors to judge suitability for the journal, and if accepted then undergoes a double-blind review process involving two international reviewers.
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Editorial Note

Organisational Influence of Teacher Leadership: Perspectives from Four Countries

As early as the 1960s, researchers began to look at the construct of teacher leadership, with a focus on the teacher as classroom leader (Bossert 1977; Nelson 1966), particularly in terms of teacher leader’s interactions with students in the classroom (Misumi, Yoshizaki & Shinohara 1977; Morrison 1974). Beginning with the international trend for school accountability, the move to increase professionalism, and the emphasis on student outcomes, more recent literature has addressed teacher leadership in terms of collaboration and the teacher’s role in whole school reform (Harris 2003; Muijs & Harris 2003; Murphy 2005; York-Barr & Duke 2004).

Despite this apparent evolution in understanding teachers, not just as leaders in their classroom but as school-wide leaders who contribute to school improvement, the view persists that teacher leadership is a limited perspective. Teach to Lead, organised as a partnership between the US Department of Education, the National Board for Professional Teaching Standards, and the Association for Curriculum and Development, states on the website’s front page that the organisation’s work is ‘expanding opportunities for teachers to lead without leaving the classroom’ (http://teachtolead.org). To fully appreciate the work of teacher leaders, schools might heed the call to ‘recognise the talents of the most effective teachers and deploy them in service of student learning, adult learning and collaboration, and school and system improvement’ (Curtis 2013: iii).

This special issue of International Studies in Educational Administration presents research that expands our view of teacher leadership to embrace a system-wide perspective. Researchers in this issue document the practice of teacher leadership in four countries, Ireland, Scotland, China, and the United States. The authors view teacher leadership from these differing contexts through the lens of reform and improvement. From these studies, the reader can gain a perspective on the ways in which teachers as leaders contribute to the school system beyond the classroom. The issue begins
with cases of teacher leadership contributing to teacher development in Ireland, Scotland, and China.

In the first article of this issue, *Evolving Perspective(s) of Teacher Leadership: An exploration of teacher leadership for inclusion at preservice level in the Republic of Ireland*, Fiona King views teacher leadership from the perspective of preservice inclusion teachers. Noting that literature on teacher leadership is scant at the preservice level, King argues that this level is where teacher leadership should begin. This study associates teacher leadership for inclusion within a moral purpose and the enactment of values. King approaches teacher leadership from the perspective of teacher as change agent. As part of a Republic of Ireland university’s teacher preparation programme, a module on leadership was developed. Through the process of understanding change, presenting research to others, collaborating on a blog, articulating their values on twitter, attending a professional conference and reflecting on these experiences, the preservice teachers in this study felt better prepared to lead as teachers, better understood the concept of teacher leadership, and were more comfortable taking on leadership roles as new teachers. The lived experiences of collaboration and leadership gained through this preservice module resulted in leadership role clarity as the aspiring inclusion teachers gained understanding of the importance of collaboration, reflection, and their responsibility for all students, both within and beyond their classrooms.

In the second study, *Policy Fudge and Practice Realities: Developing teacher leadership in Scotland*, Torrance and Murphy also examine teacher leadership as a critical element in educator preparation. However, this study investigates masters’ level leadership development in light of the connection of policy to practice. Torrance and Murphy take a critical view of Scottish policy as it addresses teacher leadership in Scotland’s schools, noting the lack of clarity in policy’s definition, roles and responsibilities for teacher leadership. Further, Torrance and Murphy argue that both literature and policy fudge the concepts of ‘teacher leadership’ and ‘teacher leader’, resulting in a perception of teacher leadership providing a link in the school leadership hierarchy. They identify a lack of consultation with the profession at the policy development stage along with lack of recognition of conceptual complexities leading to a number of practice tensions, including an exclusion of voices at the school level and sometimes headteachers’ fear that distributed/teacher leadership may negatively impact accountability goals. This mixed methods study involving teacher respondents in a leadership development programme examines teacher leadership from the teacher’s perspective, rather than the policy perspective. Findings from the survey that measured motivation, understanding and experience of teacher leadership as well as interview data recording the teacher’s lived experiences, inform the reader of the deficiencies of policy fudge. While policy fudging, or interpreting policy for self-interests, may be intentional at the macro level, the policy is outlined as purposefully vague. This allows for less conflict at the macro and meso level but may be deciphered with less clarity at the implementation level.
The issue’s third article, Developing Early Career Teachers’ Leadership Through Teacher Learning, while also examining teacher development, is situated in China where school systems are, by design, hierarchical with a single leader. Unlike the other articles in this issue, the Chinese case emphasises the role of the principal in developing teacher leaders. Teacher learning activities, as assigned by the principal, allow, empower, and inspire teachers to lead. This study’s focus on the principal as support for the development of teacher leaders through learning is an important addition to literature in contexts where sharing leadership is rare.

With the fourth article in this issue, we move from developing teachers to teachers who have established themselves as teacher leaders in their respective schools. Teacher Leaders’ Influence on Teachers’ Perceptions of the Teacher Evaluation Process is an examination of one USA state teacher evaluation system, with teacher leaders joining school principals in the evaluation of teaching. Bradley-Levin, Romano and Reichart describe how the Teacher Development and Evaluation Model (TDEM) puts teacher leadership in the centre of school improvement in one local education authority (LEA) system. Finding that principals had limited scope, time, and content knowledge to adequately conduct teacher evaluations, the LEA offered remuneration and reduced teaching load to some teacher leaders to serve as evaluators alongside the principal. This study examines teacher perceptions of the evaluation process through the Teacher Leader Inventory and open ended response questions. These authors found that teachers who identified as teacher leaders showed more positive perceptions of sharing leadership than did other teachers.

The final article in the issue, Organisational Influences of Collective Efficacy and Trust on Teacher Leadership, speaks to the connection between teacher leadership, trust in colleagues and principal and teacher collective efficacy in the school. Flood and Angelle document quantitative results from three surveys, the Teacher Leadership Inventory (Angelle & DeHart 2011), the Teacher Efficacy Belief Scale – Collective Form (Olivier, 2001), and the Omnibus-T Scale (Hoy & Tschannen-Moran 1999). Flood and Angelle found a strong and significant relationship between collective efficacy and teacher leadership. As noted in the article, these authors posit that teacher leadership moves past the notion that leadership is vested in an individual and suggests that teacher leadership more closely approximates a manifestation of the real collaborative efforts of individuals working as a collective towards a shared goal within schools. Moreover, trust was also found to have a strong relationship to teacher leadership. The connection between these three variables is an important addition to the literature on teacher leadership.

This special issue of ISEA contributes to the literature on teacher leadership in several ways. While teacher leaders are often viewed as those who are leaders in pedagogy and are experts in student engagement, the studies in this issue examine the work of teacher leaders from an organisational perspective. Formal roles and principal selection are ways in which teacher leaders gain decision making authority. However, the authors here move beyond formalised positions, to teachers as leaders for change. The research includes perspectives of teacher leadership in four countries. The
international perspectives presented in these studies provide the reader with considerations of teacher leadership, and their ways of being, as practiced in multi-national contexts. Finally, the importance of the constructs of trust and self-efficacy as essential to successful teacher leader practice may begin a dialogue about looking beyond the expertise of teacher leaders to additional positive outcomes which may result from their support.

References


**Pamela S. Angelle**

Editor of the Special Issue, *Organisational Influence of Teacher Leadership: Perspectives from Four Countries*

The University of Tennessee
Evolving Perspective(s) of Teacher Leadership: An Exploration of Teacher Leadership for Inclusion at Preservice Level in the Republic of Ireland

Fiona King

Abstract: There is an increasing body of literature that extols the virtues of teacher leadership despite the concept remaining underdeveloped and under-theorised (King & Stevenson 2017; Torrance 2013). Acknowledging the dearth of literature exploring the development of teacher leadership at preservice level, this article reports on results from a qualitative study which employed Bond’s (2011) theoretical framework for preparing preservice teachers in the Republic of Ireland (ROI) to become teacher leaders for inclusion. This study adopted a self-study approach (Vanassche & Kelchtermans 2015) involving two teacher educators, in the ROI, where the researcher, being relatively new to teacher education, was supported by a critical friend in the design, implementation and evaluation of the modules. Results strongly indicate that student teachers felt prepared to exercise leadership for inclusion through lived experiences of leadership, understanding change, being research informed and having many opportunities for reflection. This article argues for unlocking the potential for leadership for inclusion to begin with student teachers and concludes by suggesting that this article may help to address the paucity of literature around teacher leadership at preservice level and in particular teacher leadership for inclusion.

Keywords: teacher leadership for inclusion, teacher leadership at preservice level, developing teacher leadership, organic leadership, distributed leadership

Introduction

Across the globe there is increasing rhetoric and literature around teacher leadership despite the concept remaining underdeveloped, under-theorised (King & Stevenson 2017; Torrance 2013) and illusive (Forde & Dickson 2017). It is often described as a subset of distributed leadership which has gained significant prominence in recent years (Muijs, Chapman & Armstrong 2013). This article however aligns itself with a form of leadership that is more
organic where teachers can develop a collective responsibility for all pupils’ learning (King & Stevenson 2017). This is especially important in the context of leadership for inclusion where social learning processes through collaborative practice are key (Ainscow & Sandhill 2010).

Additionally it aims to answer the call for further literature from teacher educators ‘to clarify understanding of the teacher’s role in teacher leadership’ (Poekert 2012: 186). How teacher leadership is conceptualised arguably impacts on how it is enacted in practice. This article presents an evolving perspective on teacher leadership as explored in the context of leadership for inclusion by preservice teachers who undertook a major specialism in special and inclusive education.

While a plethora of research exists around teacher leadership, there is arguably a dearth of literature exploring the development of teacher leadership at preservice level (Forde & Dickson 2017). Perhaps cultivating teacher leadership at this level is not seen as important or possible. Therefore, the aim here is to explore to what extent and how teacher leadership for inclusion may be developed at preservice level.

**Teacher Leadership**

Teacher leadership had its roots in the 1980s with various theories and conceptualisations evolving since then. Arguably one of the most prominent theories is that of distributed leadership within which teacher leadership often sits. Nevertheless, a lack of consensus about a definition of teacher leadership still prevails. However for the purposes of this article, teacher leadership has largely conceptualised leadership as influence and leadership as values.

In 1988 Cuban defined leadership as influence by referring to ‘people who bend the motivations and actions of others to achieving certain goals (p. 193). Sixteen years later leadership is described as ‘... the process by which teachers, individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement’ (York-Barr & Duke 2004: 287-288). Therefore, it is arguably seen as ‘a relationship of social influence’ (Spillane & Coldren 2011: 78) perhaps ‘intentional influence’ (Yukl 2002: 3) based on expertise rather than a formal position of authority (Timperley 2009). Accepting this stance situates teacher leadership squarely within the professional domain of all teachers and within the context of teaching and learning as a relational activity.

Teacher leadership may involve transforming teaching and learning both in and beyond the classroom to include the wider school and community (Crowther et al. 2002) as child development is shaped significantly by the mutual interactions between the child, family life and the community (Bronfenbrenner 1979). This view of teacher leadership may include teachers as leaders of innovation or change within and beyond their classrooms as part of professional practice (Frost 2012) regardless of formal roles in schools. However understanding the change process is essential for effective leadership (Fullan 2001) especially
for newly qualified teachers as their capacity to influence change may be ‘influenced by social relationships within schools and … the degree of peer acceptance that is achievable’ (Hulme, Elliot, McPhee & Patrick 2008: 69-70).

Change may begin with individual teachers seeing a need for change, for example, when their identity as a teacher is at odds with current teaching and learning practices or policy expectations and outcomes (Forde & Dickson 2017). Change can also happen where teachers’ practices are not aligned with their values and beliefs and, as such, teachers are experiencing a ‘living contradiction’ (Whitehead 1989). As professionals, teachers need to focus on the moral purpose of teaching and learning, the difference they are trying to make. This moral purpose keeps teachers closer to the needs of children and change enables teachers to develop better approaches to achieve their moral goals (Fullan 1993). This is echoed by O’Gorman and Drudy (2010) who argue that the ‘creative artistry of teaching is in responding to change with new and innovative approaches to the challenges presented to them’ (p. 165). Noteworthy is the link between leadership and change in the literature (Bush 2008) with calls for faculties of education to ensure that student teachers have the knowledge and skills to bring about meaningful change (Fullan 1993). Promoting teachers as leaders for inclusion is important to avoid reproducing the current inequalities in schools where teachers arguably become encultured into the practices and values of their schools as the impact of their teacher education may become ‘washed out’ after four or five years (Forde & Dickson 2017: 4).

This signals a need for teacher education programmes to have a more holistic approach to include the role of the teacher in the wider school community (Muijs et al. 2013) and to build capacity for change in all teachers where they not only change what is happening in their classrooms but in the wider school community to align with their moral imperative. Four key ingredients are cited by Fullan (1993) as necessary for building capacity for change; personal vision, inquiry, mastery and collaboration. Personal vision asks individuals to consider the difference they are trying to make. It is arguably linked to their identity as teachers and thus linked with leadership and values.

Inquiry involves continuous questioning of practice and continuous learning to achieve the goal or vision. This potentially could reflect the concept of teachers as researchers of their own practice and that of the wider school community (O’Gorman & Drudy 2010). Mastery also involves professional learning and development but requires teachers to become adept at the areas for change by drawing on their funds of knowledge or expertise in the teaching moment (Hegarty 2014). Such mastery is an important characteristic for teachers as change-agents aiming to influence others (van der Herijden, Geldens, Beijaard & Popeijus 2015).

Finally collaboration is an essential ingredient for building capacity for change especially leading change beyond the classroom to the wider school community. Developing teachers’ relational agency (Pantic & Florian 2015) or capacity to work purposefully with others as pedagogues (Forde & Dickson 2017) is essential for enhancing expertise and capacity for
change and in particular capacity for inclusive practice where teachers are encouraged to
develop a collective responsibility for all students’ learning (King & Stevenson 2017).

Importantly, enhancing human agency to enable teachers to mediate any impeding
structures and demands in a bid to focus on what matters most impacts on students’ learning
(Frost 2012; King 2014, 2016). The strongest predictor of leadership behaviour comes from
personal characteristics or personal factors such as teachers seeing themselves as a
professional with a sense of professional agency (van der Herijden et al. 2015).

**Teacher Leaders**

Teacher leaders are often considered to be those with formal leadership roles. Many have
additional qualifications and explicitly have sought teacher leader roles with some getting
additional remuneration for this role. In the ROI the use of the terms teacher leadership or
teacher leaders is not visible in policy documents or practice. There is however ‘middle
management’ or ‘roles or responsibility’ which are formal roles and in the past had additional
remuneration. Since the economic crash these roles have generally not been sanctioned in
schools. Instead teacher leadership is seen within the context of distributed leadership and is
situated within the school improvement agenda as can be seen on documents by the
Professional Development Service for Teachers (PDST), the operational arm of the
Department of Education and Skills. Additionally, much of the emphasis with the newly
formed College for School Leadership is on principals and aspiring principals.

Regardless of titles or formal roles, teacher leaders can ‘lead within and beyond the classroom,
influence others toward improved educational practice, and identify with and contribute to
a community of teacher leaders’ (Katzenmeyer & Moller 2001: 6). Arguably this is the remit
of all teachers as part of professional practice as discussed above. However teachers in their
first year or early years of teaching may have little experience or reputational power to
influence others (Forde & Dickson 2017). Interestingly, a study of second-year trainees (n=123)
in the Teach First Alternative Certification Programme in the UK reported that these teachers
were highly motivated and able to exercise leadership in their schools possibly due to having
entered their teacher education programme with high levels of academic success (Muijs et al.
2013). This motivation or sense of commitment and self-assurance, along with resilience and
passion to achieve their moral goals, has been identified by others as central to teacher
leadership (Hargreaves & Fink 2006; van der Herijden et al. 2015). This echoes what Fullan
(1993) says about change agentry and moral purpose being closely aligned or similarly agency
and identity being strongly linked (Forde & Dickson 2017).

**Teacher Leadership for Inclusion**

This article focuses on teacher leadership within the context of leadership for inclusion where
it is argued that inclusion will be won in the heart or soul of individual teachers (MacRuaric
2016). Teachers need to be able to articulate ‘personal and educational values which represent their moral purposes for their schools’ (Day, Harris & Hadfield 2001: 53) as attitudes and beliefs about inclusion influence practices (Brown 2006). Teacher leadership for inclusion is the enactment of these values (Brown 2006), and where beliefs and values about diversity are challenged (Muijs et al. 2012).

Creating conditions where there is an alignment of hearts and minds (Bass & Riggio 2006) or furthermore hearts, minds and purpose is pivotal for realising inclusion (MacRuairc 2016). Additionally, a shared culture and ethos with teachers working collaboratively through teamwork and collaborative problem-solving approaches is a key tenet in realising inclusion in schools (Muijs et al. 2012). Individual actions are unlikely to overcome injustices with a call for actions to be grounded in a joint effort (Berkovich 2014). The challenge within and across schools may be the tension between equity and excellence, the ‘struggle between commitment to moral values of inclusion and diversity with the dominance of the standards agenda’ (Leo & Barton 2006: 167-168). However, recent findings from the OECD show that the best schools are the most equitable schools (Day & Sammons 2013).

Continuing professional development is important to get to the hearts of teachers (MacRuairc 2016) as they are the most significant influencing factor within schools influencing student achievement (Hattie 2009; OECD 2005). Therefore, teachers have a key role to play as leaders of inclusion (Pantic & Florian 2015) where teacher leadership is conceptualised as a professional commitment and a ‘process which influences people to take joint actions toward changes and improved practices that enable achievement of shared educational goals’ (Forster 1997: 88). This would suggest that all teachers are seen as being capable of exercising leadership despite the fact that some would argue that not all teachers want to lead or are capable of leading (Torrance 2013). In contradistinction to this, Bond (2011) posits that not only can all teachers lead but that they want to lead and should lead as part of being a professional and that this preparation for being a teacher leader should begin at preservice level.

**Teacher Leadership for Preservice Teachers**

Arguably the time to introduce the idea of teacher leadership to teachers is at preservice level when teachers are developing their own philosophies on education and their role within it (Bond 2011). Acknowledging the support for the development of teacher leadership to begin at preservice level (Muijs et al. 2013), the challenge for teacher educators is how to develop or unlock the leadership potential of student teachers. This should not be tokenism but rather to instil a commitment to leadership and a capacity to lead in student teachers (Forster 1997). Bond (2011), while accepting of a lack of consensus about a definition of teacher leadership, outlines the knowledge, skills and dispositions that teachers need to be teacher leaders. He speaks about teachers having a vision for leadership and how they can lead in their schools in myriad ways, arguably conceptualising teacher leadership as a change-agent role, as
teachers aim to align their moral purpose and practice (Fullan 1993), their hearts, minds and purpose (MacRuairc 2016). Noteworthy is that the starting point may not always be the ‘change mindset’ as teachers may use their agency to be innovative which may lead to change (van der Herijden et al. 2015).

Bond (2011) argues for teachers to have knowledge of themselves as leaders as well as educators. He also emphasises the importance of knowledge of others, for example parents, students, colleagues, schools, and others in the wider community reflecting Bronfenbrenner’s (1979) concept of the child’s development being shaped by others in their family life, community and society. The significance of understanding schools as organisations is part of this as teachers may be in a school that aligns with or stands in contradistinction to their values and beliefs around inclusion. Learning how to lead change and mediate obstacles is an important aspect of leadership (Fullan 1993). Knowledge of teaching is also central to teacher leadership as teachers need to exemplify excellent practice in order to share their expertise with others. Being a lifelong learner can also support teachers in their endeavours to be recognised as teachers with expertise. Expertise is also necessary for identifying problems (van der Herijden et al. 2015) and becoming active researchers of their own practice and that of the wider school community (O’Gorman & Drudy 2010). Teacher leaders need to see themselves as problem-solvers and advocates both within and beyond the classroom and school which in turn requires them to develop their relational agency (Pantic & Florian 2015). This is especially pertinent for developing inclusive practices which rely heavily on developing social learning processes within and beyond the school (Ainscow & Sandhill 2010). Additionally, Bond states that teacher leaders need to have a positive disposition, be trustworthy and reliable and be confident in their abilities, resilient and above all, possess a sense of humour.

One of the few frameworks for developing teacher leadership at preservice level is that of Bond (2011) who suggests a developmental approach whereby the necessary knowledge, skills and dispositions outlined above are interspersed throughout all modules from the beginning of student teacher education. Alternatively, programmes could have a discrete module on leadership if the programme had space for that. In concordance with others (Brown 2006; MacRuairc 2016), the importance of reflecting on attitudes and a vision for teacher leadership are also highlighted within the framework. Asking student teachers to articulate these over time enables them to develop their own philosophy of teacher leadership. It may be asking them to reflect on ‘[w]hat difference am I trying to make personally?’ (Fullan 1993: 13). Affording student teachers opportunities to volunteer is also important to set them on their journeys to making changes happen as is participation in professional organisations to enhance their professional development through sharing of expertise.
Methods

Context

Teacher education in the ROI moved from a three year undergraduate bachelor of education (BEd) degree to a four year undergraduate degree beginning in autumn 2012 with the first cohort of student teachers graduating in 2016. Participants in this research were the first group of student teachers from this cohort (n=24) who undertook a major specialism in special and inclusive education which involved participation in six modules. The researcher was asked to design two of these modules, a discrete module on ‘collaboration’ for students in the third year of the BEd specialism (BEd3) and a further discrete module on ‘leadership for inclusion’ for students in the fourth year of the specialism (BEd4). The discrete module on leadership in fourth year was due to the structure of the BEd program in the college of education whereby all modules in fourth year were known as leadership for XXX. In designing the modules, the researcher’s aim was to support these student teachers to become teacher leaders for special and inclusive education. Using Bond’s (2011) theoretical framework for preparing preservice teachers to become teacher leaders, this study adopted a self-study approach (Vanasse & Kelchtermans 2015) involving two teacher educators, in the ROI, where the researcher was supported by a critical friend in the design, implementation and evaluation of the modules. Given the dearth of literature in the area of developing teacher leadership at initial teacher education level and the researcher being relatively new to teacher education, it was important to explore same. This article reports on findings of research which employed Bond’s (2011) framework for developing teacher leadership to answer the research question: To what extent may teacher leadership for inclusion be developed at initial teacher education level?

Methodology

Bond’s (2011) framework was adopted and implemented as outlined in Table 1 and explained in detail below.

Table 1: Links between theoretical framework and assessment

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<td>Student presentations on journal articles</td>
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<td>Reflect on attitudes and vision of teacher leadership</td>
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<td>BEd4 – Twitter #sie401</td>
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<td>Opportunities to volunteer</td>
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The researcher was cognisant of the importance of weaving the necessary knowledge, skills, and dispositions as recommended by Bond (2011) throughout all modules and, therefore, these were considered at the outset of the design of the collaboration module for the BEd3 cohort, as collaboration is an essential aspect of leadership. As part of this collaboration module, the students engaged in a private blog, during school placement for ten weeks, to reflect on their knowledge, skills, beliefs and attitudes towards special and inclusive education. Blog postings were in response to prompts around identifying and reflecting on collaboration, collaborative practice and curriculum and pedagogy related to special and inclusive education. Students engaged with each other on the blog while the researcher and critical friend engaged in challenging the students’ attitudes, beliefs and practices and supported them in collaborative problem-solving related to identified issues. On return to college, the students had to reflect on the experience of the blog as a model of professional development and learning through using King’s (2014) evidence-based professional development (PD) evaluation framework. This was to support their ability to articulate their vision and thinking about special and inclusive education while also highlighting the importance of professional development and learning in their journey of lifelong learning. It was hoped that they would be leaders for professional development and learning among their colleagues going forward.

Building on this, a number of these students the following year (BEd4) had to act as ‘leaders’ for the next cohort of BEd3 students as part of their module on leadership for inclusion. Their role was to challenge the BEd3 students’ attitudes, beliefs and practices thus affording the students in BEd4 a lived experience of teacher leadership, aligning with Dewey’s (1938) concept of experiential learning focusing on learning by doing. Students were also afforded an opportunity of continuous reflection on their attitudes and vision of teacher leadership for inclusion through engagement in Twitter (#sie401) as part of their assessment for the leadership for inclusion module.

Opportunities to volunteer were somewhat addressed through assessment by providing a lived experience of attending a professional conference. Students were allowed to attend the conference free of charge in return for volunteering to help out at the conference. However, not all conference directors required the students to volunteer. Nevertheless, it did also facilitate the participation in professional organisations (Bond 2011) which was important for engaging the teachers with the wider community in education. The researcher wanted the students to have lived experiences to help differentiate between conceptual knowledge (Theory – big T) and perceptual knowledge (theory – little t) (Korthagen, Loughran & Russell 2006) or to connect theory and practice (Brown 2006). Lived experiences of collaboration and leadership included engaging with the blog, twitter and attending conferences to support them in their journey of lifelong learning where they would hopefully engage in same or similar as part of a community of learners with a common focus, in this case, special and inclusive education. Participation at the conference was also linked with an assessment which required reflection related to their professional learning, once again using King’s (2014) PD
framework as a reflection portfolio. All of the above arguably reflected the components of Bond’s (2011) framework for developing teacher leadership at preservice level.

In addition to these aspects, all students were required to engage with assigned literature around collaboration and leadership for inclusion in a bid to support student teachers in being research informed. To support their learning in this regard, students were assigned to groups as part of the BEd3 module and presented an assigned article to their peers in a way that was accessible to all learners, thus reflecting teaching for special and inclusive education; another lived experience. These articles related to collaboration, curriculum and pedagogy and change.

The following year a number of the students as part of the BEd4 module then had to exercise leadership by presenting the same journal articles to various cohorts, for example, the Teaching and Learning Committee of the college, a group of postgraduate students and their own class group of 400 students. Another aspect of leadership in the BEd4 module involved taking part in a debate with fellow students, lecturers and experts in the field of special and inclusive education, in front of the class group of 400 students, organised by the coordinator addressing special and inclusive education across the BEd programme. In summary, exercising leadership in the BEd4 module comprised either leadership on the blog for the BEd3 cohort, leadership in terms of presenting journal articles, or finally, leadership through debate.

Data were collected from multiple sources including student teachers’ PD reflection portfolios, student evaluations of the modules through a choice of questionnaire or focus groups along with a video session (V) with students and staff sharing experiences of the modules. Other data included the researcher’s reflections and observations following each class along with the reflections of a critical friend.

Results

A process of deductive coding was used based on Bond’s (2011) theoretical framework along with inductive coding of the data for any additional insights into supporting teachers’ development of teacher leadership. Thematic analysis was employed to read, code and generate themes from the various data sources. Results from the data are outlined under the following headings: concerns, turning points, exercising leadership and self-efficacy for leadership.

Concerns

Concerns were expressed by the researcher following week 1 of the BEd4 module on leadership for inclusion.

Am I pushing them too far in the various ‘leadership of inclusion’ assessments—presentations, debates and panel, twitter and blog? ... Assessment is complex and
given I feel I have a strong rationale for each one, I am torn between what I expect of them and what I want for them in terms of their own learning. It is like I can see the big picture with this and they can only see each piece in isolation. (Researcher Reflection (RR), week 1)

Some students also had concerns at the outset of the module as reflected by a student who completed a questionnaire (Q) at the end of the module.

At first I was unsure how we would explore the topic of Leadership over the full semester ... reflecting back on the course it enabled us to see leadership as change, and how to implement it successfully into schools ... Opportunities were provided [through assessment] to experience first-hand the importance of leadership. (Q: Student (S)20)

Similarly, another student who was involved in presenting an article to the class group of 400 students stated:

What made it worse was my own year..... first of all, but then like, it was such a great feeling when you actually did it... (Focus Group (FG): S4).

Overall fears were allayed as reported by a number of the students in the focus group at the end of the module.

I also think that this module is far ahead of every other module in the college, in terms of assessment. I know there’s only 25 of us in the class, but in terms of the way we are assessed, as in it’s not a written exam, and it’s continuous assessment, I think it’s far better. (FG: S3)

It was not only the continuous aspect that appealed to the students. ‘I genuinely was learning while I was doing the assignment’ (FG: S1). ‘It wasn’t just kind of like ..... “oh, it’s your last year we’d better talk about leadership for a bit”. Like... it was definitely like.... I just thought we really actually all learned about it’ (FG: S3). This student summed up her experience of one of the leadership assignments: ‘Leading through student presentations: Challenging, enjoyable’ (Q: S9). On reflection linking leadership with the assessment of the modules to afford students lived experiences of same worked well as ‘we can talk about collaboration, we can talk about leadership, but unless you actually get to experience it, you don’t connect with it in the same way’ (V: Researcher). While the students and researcher demonstrated concerns at the outset, the turning points appeared in week 2 of the leadership module.

**Turning points**

Having spoken with the students in week 2 of the module, the researcher reflected: ‘I was more reassured after today’s session that they will manage the assessments assigned’ (RR). This was further reinforced having observed a group of students between week 1 and week 2 of the module present their journal article to a cohort of 55 postgraduate students who are all teachers in the area of special and inclusive education.
My thinking has certainly changed regarding pushing students too far with presenting their articles. Wow they were great at presenting and well able to field questions and comments from the teachers...One postgraduate student commented on two of the presenters being future principals/leaders. Another commented publicly about how great it is to see these students going out to schools with leadership roles in mind. (RR, week 2)

Furthermore, one postgraduate student asked the student teachers to explain their assessments for the module and ‘the students were able to articulate a rationale for this [each of the assessments] which was nice to see’ (RR, week 2). This turning point was also evidenced by students themselves. One typical comment made in the questionnaire:

I was part of the student presentations group. Initially I felt that we’d been given the hardest task. Having to stand up in front of our whole year and present was a terrifying prospect for me. After our first presentation, however, I felt that we were being given such a wonderful opportunity to share our learning and lead in that area. The feedback we got from the presentations was really empowering and it helped us see what we can gain from sharing our experiences with others. It’s sometimes easy to assume that because we are still student teachers that teachers, principals and lecturers may not value what we’ve to share, but this experience proved different. (Q: S14)

This arguably reflects teachers wanting to lead and exercise leadership as part of professional practice (Frost 2012).

**Exercising leadership**

Both the researcher and critical friend reflected on the student teachers’ capacity to exercise leadership which Forster (1997) argues is important to instil in preservice teachers:

Having looked at how the students are moderating on the blog I am once again astounded at how they are ‘leading change’ by supporting their fellow students (BEd3) and pushing them forward in their thinking. (RR, week 3)

The researcher’s critical friend (CFR) responded:

Yes…they are leading... they are clearly showing the capacity to lead, with some already exceeding my expectations… I’m thinking of one student who has spoken up in class relatively infrequently but comes across as having a much stronger presence in the blog. (CFR, week 3)

Similarly, one student teacher found the blog as an opportunity to exercise leadership. ‘I was remembering how I was feeling last year and how I would have liked to be supported. I was kind of trying to do that for somebody else’ (FG: S2). Interestingly many of the students linked the idea of leadership to reflection, perhaps helping to answer Poekert’s (2012) call for understanding the teacher’s role in teacher leadership.
Leadership is an area closely linked to reflection, and this course has emphasised the importance of being a leader figure and taking initiative and risks. From trying new methods and strategies, we then need to reflect and see what went well and what could be improved on, and this is evident in the CPD portfolio (reflections on conference attendance and blog) and the blogs. (FG: S8)

The assignment on Twitter also ‘was actually really good, as a kind of reflection’ (FG: S3) arguably supporting Bond’s (2011) and Brown’s (2006) call for having a vision for teacher leadership. Similarly, S6 in the video session highlighted the importance of reflection on practice along with having a vision, another important component highlighted as necessary for building capacity for change (Fullan 1993).

It has become apparent to me the importance of having courageous conversations so that positive changes can be made to our teaching and school environment. To develop these changes, we need to have experienced reflecting on our practice, have a vision and collaborate with others for development. (S6)

Noteworthy is the emphasis on courageous conversations, perhaps reflecting MacRuairc’s (2016) notion of challenging beliefs and attitudes which is also evident in what S20 (V) says:

I now appreciate the high levels of responsibility teachers have and the importance of intrinsic motivation to meet the needs of students. The ability to foster change and leadership in an inclusive and supportive learning environment. We have engaged and have been supported through group discussions on numerous topics...with our classmates, lecturers and guest speakers. Examining a range of perspectives especially when we were on school placement via the blog was beneficial for extending our own thinking and supporting each other. This is something that we have been encouraged actively to do, through a range of mediums. This underlines the benefits that effective communication and collaboration has to offer for both teachers and students. This is something that we can do in our own classrooms and schools in the future as it inspires leadership.

Of interest is both S20 and S6 above referring to changes to the school environment, reflecting the wider school and community as espoused by Crowther et al. (2002) and Muijs et al. (2013). Many of the students saw leadership as linked to change, being a leader of change and motivated to make a difference thus focusing on the moral purpose of teaching (Fullan 1993). A typical comment was that by S23 in the video session:

Leadership is not a word I would have thought had much to do with primary school teaching before this course. I had never seen myself as a leader before and didn’t realise how important it is to be a leader and be able to implement change as a leader. Teachers must be motivated to make a difference and accept change.

S7 in the FG also looked at leadership as influence (OECD 2005; Spillane & Coldren 2011; York-Barr & Duke 2004):
I suppose it’s just a thing that as teachers, we have...non leadership roles but like we can make such an influence, bring so much change to children’s lives, that was a big thing. Never thought about teachers being leaders before.

Having experienced a discrete module on leadership for inclusion in BEd4 as distinct from leadership being woven from the beginning of the BEd degree, the concern was that these student teachers may not feel confident in their abilities to lead change. However, findings from the data demonstrate student teachers’ sense of efficacy regarding exercising leadership.

**Self-efficacy for leadership**

Student teachers demonstrated not only an awareness of the importance of leadership but a belief in themselves as leaders. ‘I have learned a lot about leadership and my own abilities to make change. This module has taught me the importance of leadership in schools and has given me the necessary tools to take risks to make change’ (V: S11). This self-belief was further reflected in S16’s comment on the video: ‘We will be future professionals within the schooling system, who I see as having the “expert” knowledge.’ The leadership module made S18 (V) realise that:

… on completing this degree I will be regarded as a professional and it will be up to me to stand up for what I believe and advocate for change. With the knowledge and experience I have gained from this course, I feel more confident in my own ability as a teacher, a leader, a collaborator and a professional.

This arguably supports the strongest predictor of leadership behaviour with teachers seeing themselves as a professional with a sense of professional agency (van der Herijden et al. 2015). Meanwhile, S6 (FG) felt that ‘we’re all capable of being a leader then and also working with others as well, taking them along with us’, indicative of Yukl’s (2002) intentional influence. When pressed by the interviewer (Critical Friend) about how you know if you are capable, S6 replied:

I think it’s just been the whole motivation, or self-esteem, kind of built throughout this module, then the CPD [reflection] or the professional development courses [conference attendance] as well they’re great for developing your expertise in areas and making you feel that you are capable of leadership.

This motivation and self-assurance for teacher leadership has been highlighted as central to teacher leadership (Hargreaves & Fink 2006; van der Herijden et al. 2015). S5 (FG) added to this by saying, ‘how do I know I’m going to be a leader? It’s not that I know loads of knowledge, I don’t know all the expertise but I nearly know ways that I can research it’ arguably reflecting the emphasis on problem-solving through collaboration and being research informed through engagement with journal articles for the student presentations and debate. Noteworthy is one student’s comment: ‘I think it was really well...like the literature was intertwined into it, not just thrown at you’ (FG: S4). Another student also felt it wasn’t all about expertise and experience:
I think the whole module has made us all a bit more confident and made us feel like... ‘Oh yeah, we don’t necessarily have to have 20 years’ experience to be a leader’. You can lead in your own way, working with other people... Like just talking with my mum, she did a leadership course last year, and she’s a principal, and she was like.... ‘I never….. it took me 20 years to figure out this stuff!’ (FG: S2)

Overall, the commitment to exercising leadership for inclusion was palpable as espoused here by S7 (FG):

I suppose another thing that kept coming up was that motivation, and that you want to be a leader; and I think from this module alone you could see that, 23 of us were in there wanting to be leaders.

Discussion and Conclusion

This research described the development of teacher leadership for inclusion at initial teacher education level in the ROI using Bond’s (2011) framework for developing teacher leadership at preservice level. Given the paucity of teacher leadership research at preservice level, this article set out to explore to what extent and how teacher leadership for inclusion may be developed at preservice level. Analysis of data from multiple sources shows that student teachers felt prepared to be leaders for inclusion through lived experiences, linked to assessment, which allowed them to connect conceptual and perceptual knowledge of teacher leadership (Korthagen et al. 2006) linking theory and practice (Brown 2006). The experiential learning (Dewey 1938) affording opportunities to lead inclusion in a variety of contexts, along with reflecting on attitudes, beliefs and vision of leadership for inclusion supported their self-efficacy around teacher leadership for inclusion (Brown 2006). Collaboration was central to all activities thus building student teachers’ relational agency (Pantic & Florian 2015) and capacity for change (Fullan 1993). Being research informed through engagement with the literature also played a role in teachers’ sense of self-efficacy and agency related to their professional role as teacher leaders.

While the above findings have informed an evolving perspective of teacher leadership as experienced in one context, they may be useful in helping to clarify the teacher’s role in teacher leadership for inclusion (Poekert 2012). This role is arguably one which is collaborative, reflective and influential and involves change aligned with a personal vision and commitment to inclusion. Furthermore, it is conceptualised as being wider than the classroom to support a collective responsibility for all pupils’ learning (King & Stevenson 2017).

Overall, Bond’s (2011) framework for preparing preservice teachers to become teacher leaders was instrumental in the student teacher’s journey towards teacher leadership. Interestingly, the module on teacher leadership was a discrete module which built on previous modules of collaboration and curriculum and pedagogy as distinct from leadership being woven throughout all modules from the beginning of the degree. Being immersed in leadership for
their final module in BEd4 arguably situates the student teachers well positioned to engage in teacher leadership on entering their schools.

Nevertheless, this article argues for unlocking teacher leadership at preservice level where teacher educators can win student teachers’ hearts, minds and purpose for inclusion (MacRuairc 2016). It evidences teacher leadership as a professional commitment (Forster 1997) to enacting one’s values. What remains to be seen is whether or not these teachers in their first year of teaching will have sustained this commitment as beliefs are ‘hardy and highly resistant to change’ (Brown 2006: 703) or indeed if the power to influence others in schools is totally dependent on experience and knowledge (van der Herijden et al. 2015), reputational power (Forde & Dickson 2017) or peer acceptance (Hulme et al. 2008). Having positive experiences in their schools where organic leadership is allowed where they are encouraged to initiate change from below with support from leadership from above (King & Stevenson 2017) will enable these teachers to mediate barriers along the way. The question may be if schools are ready for these teacher leaders.

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References


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Policy Fudge and Practice Realities: Developing Teacher Leadership in Scotland

Deirdre Torrance and Daniel Murphy

Abstract: Scottish policy developments in initial teacher education, professional standards and career-long professional learning reflect a growing understanding of the leadership role teachers can play, particularly in curriculum and pedagogy, in improving the experiences and outcomes of pupils. In the policy rhetoric of re-professionalisation, unpromoted teachers liberate their professional creativity, leading ‘bottom-up’ approaches to school improvement. However, there are policy and conceptual tensions in the construction of ‘teacher leadership’, the related term ‘teacher leader’ and the practice realities experienced by teachers seeking to play this leadership role in their professional settings. This article explores these tensions in a small-scale mixed methods study of teachers participating in Masters-level ‘leadership development’ programmes. The study considers the policy and practice environments, motivations, supports and barriers that faced these Scottish teachers seeking to develop their leadership practices and capacities. A lack of clarity at national level for framing the practice of teacher leadership is identified. School staff require to develop for themselves understandings of the complex interplay between bottom-up and top-down leadership, local understandings of ‘what teacher leadership means and how it works in our school’, within a supportive culture. This was not found to be the norm. The article concludes by outlining implications for policy and practice, including the need to address a national ‘policy fudge’ around teacher leadership that adversely affects practice realities. As part of that, there is a need for further discussion around who is responsible and accountable within a distributed leadership perspective, for what and to whom?

Keywords: teacher leadership, teacher leaders, school improvement, distributed leadership, professional learning
Introduction: Teacher Leadership – Theory and Practice

Over the past two decades, teacher leadership has become a major theme within policy, research and literature broadly located within a distributed leadership paradigm (Harris 2004; Mangin & Stoelinga 2008). In their historical review of the teacher leadership literature, Angelle & DeHart (2016: 89) identify that in the late 1980s, teacher leadership entered a ‘third wave’, with an emphasis placed on ‘collegiality, collaboration, and continuous learning’.

A number of definitions of teacher leadership focus on pedagogy: teacher leadership influence is exercised largely in the classroom or learning context, through relationships with peers, identifying areas for improvement through critical reflection in and on practice (Torrance & Forde 2016). Through collaboration and mutual accountability, teachers take professional responsibility for enacting changes to practice, enhancing self-esteem and work satisfaction, increasing motivation levels, as well as performance and retention levels. In so doing, ‘[l]eaders get their power not from the hierarchy above but from those around them’ (O’Brien 2016: xiii). This kind of teacher leadership practice may help develop a learning community, building networks of support and expertise to strengthen school organisation (Torrance 2018). It requires skills in working with adults, focused on innovating and improving practice for the benefit of pupils. It requires teachers to develop a strong sense of their own agency (Pantić 2015), self and collective efficacy (Angelle & Teague 2014), legitimising and extending their reach from the semi-private context of their classroom to influence practice within the wider school. Crowther, Kaagan, Ferguson and Hann (2009: xvii) summarise this understanding in describing teacher leadership as:

... action that transforms teaching and learning in a school, that ties school and community together on behalf of learning, and that advances social sustainability and quality of life for a community.

Such instructionally focused leadership can promote professional empowerment (Murphy 2005). Rather than teachers being workers within a bureaucratic hierarchy in which power and control radiate downwards through detailed instructions, teachers in this perspective are viewed as independently accountable professionals, using expert judgement to make situationally specific decisions for their immediate instructional context, contributing to new forms of ‘participatory governance’ (Murphy 2005: 18). This perspective sees leadership as a relationship of social influence, and leadership influence as being fluid across the organisation, rather than locked into hierarchical roles and remits (Torrance 2013, building on Timperley 2009 and Spillane & Coldren 2011). Professional authority and credibility derive not from hierarchical position per se, but from expertise (as perceived by self and others), demonstrated in real situations. This, in theory at least, enables all members of a school community to contribute to school leadership based on their authority, influence and legitimacy (Diamond & Spillane 2016).
However, the term ‘teacher leader’ sits alongside this vision of ‘teacher leadership’. ‘Teacher leaders’ may have been allocated or delegated specific roles or tasks, either with or without additional remuneration, by their managers. Arguably this suggests a more closed, limited concept of leadership. Where leadership and its influence on others is distributed in this way, it is questionable if power is actually distributed (Fitzgerald & Gunter 2008). At the micro level, school managers use their positional power to set the context for teacher leadership (Little 2002). As the professionals held publicly accountable for the performance of ‘their school’, they may hesitate to distribute power. Incorporating teacher leadership into hierarchical management systems can be seen as a way of harnessing the potential flexibility and creativity of fluid forms of leadership, whilst mitigating the risks of unpredictability in teacher leadership (O’Brien 2016). Perhaps surprisingly, theoretical constructs provide little guidance on this dynamic. Much of the distributed leadership literature ‘lack[s] a critical, questioning approach to power. … A much greater understanding is needed of power in the practice of distributed leadership’ perhaps through the construct of ‘social authority’ as ‘everyone is involved in the ongoing production of authorities by contributing to who is accepted as or excluded from exercising authority and leadership’ (Woods 2016: 155). Indeed, Diamond & Spillane (2016: 151) argue that ‘power asymmetries in leadership practice’ merit attention in progressing understandings of distributed leadership.

Such conceptual tensions in the definition of teacher leadership are amplified by an apparent downgrading of ‘management’ within an all-embracing concept of ‘leadership’, with management much reduced in status (Gronn 2003). Within that paradigm, the promotion of distributed leadership often fails to acknowledge that ‘distributed leadership is not a panacea; it depends on how it is shared, received and enacted’ (Harris & DeFlaminis 2016: 143).

Teacher Leadership – the Scottish Context

Although education systems in developed countries share certain features, they have unique policy contexts. Historically, Scotland’s comprehensive schooling system has been free to all pupils (Lingard & Ozga 2007; Paterson 2003a), and its teachers have been held in high regard, valued both by the public and by politicians (Munn et al. 2004; Paterson 2003b). Global travelling policies such as the re-professionalisation of teaching have been mediated by embedded practices and cultures leading to ‘a very specifically Scottish ideology of education’ (Paterson 2003a: 30). The key organisations driving policy at the macro level are:

- Scottish Government setting national policy in education through legislation, a national regulatory framework and funding local authorities to run schools and employ teachers;
- General Teaching Council for Scotland (GTCS) setting professional standards for all teachers and responsible for the five-yearly cycle of Professional Update (GTCS 2012a), the process of professional re-certification for all teachers launched in 2013;
• Education Scotland, with both support and improvement roles, incorporating Her Majesty’s Inspectorate for Education [HMIe], responsible for quality assurance.

At the meso level, 32 Scottish Local Authorities run schools, employing and managing teaching staff. Local Authorities work within the framework set by national policy, but also have their own identified priorities, taking initiatives and producing policies and guidelines for schools. Although national agencies develop and decide policy, implementation is local, with potential political tensions between these different levels of the system.

At both macro and meso levels, negotiation about how desired government policy should be implemented involves teachers’ professional bodies (unions), the most prominent being the Educational Institute of Scotland (EIS). They influence both policy and implementation through local and national ‘joint negotiating committees’ where they protect teachers’ rights and conditions of service. It can sometimes appear that negotiated agreements are driven not by educational vision but by political compromises, ‘an accommodation of interests rather than an agreement of the best way forward educationally’ (Murphy, Croxford, Howieson & Raffe 2015: 146). In this policy development context, policy ‘fudge’ plays a key role in allowing each of the key players to interpret the eventual outcome to suit their own purposes (p. 155).

It is said that, ‘the key individuals in the Scottish policy community can fit in a single room, meet frequently and may do so again the following day wearing different hats. Such meetings are often preceded by phone calls, informal chats and other back door soundings’ (p. 146). At its best, this ‘collaborative model’ (Raffe & Spours 2007) ensures all voices are heard and, working through a consensual evolutionary model, can even out the potential disruptive character of change. However, there can also be a tendency to hear only ‘inside’ voices, excluding the wider civic community and those who work in schools (as opposed to those who represent them in discussion and negotiation). In such a well established policy network (Rhodes 1997), ‘policy community’ and ‘leadership class’ (Johnston & MacKenzie 2003: 97), policy may mirror the interests or values that ‘inform the dominant discourses in the socio-political environment’ (Bell 2007: 9). This is the context of recent Scottish teacher leadership policy and practice development.

Through documents such as A Teaching Profession for the 21st Century known widely as TP21 (Scottish Executive 2001) and the Review of Teacher Education (Donaldson 2010), the development of a professional and policy consensus on the language of teacher leadership can be observed. TP21 mandated extended collegial working and lifelong professional development. It also stripped out and simplified in-school management layers with an expectation of more participatory decision-making at school level. Donaldson (2010: 15-16) used constructs of ‘extended professionalism’ and ‘expert practitioners’, while also making use of the words ‘leader’ and ‘leadership’ an astonishing 149 times (as opposed to management’s 17 entries), to define the new professionalism.
It was helpful in facilitating this broader policy consensus – one which recognised the potential of ‘teacher leadership’ to empower teachers professionally – that the EIS (2010: 4) developed a positive policy position on teacher leadership, though it was a policy which, unlike Donaldson (2010), made a clear distinction between ‘leadership’ and ‘management’:

This policy paper … recognises that every qualified teacher has, by definition, a leadership role to play in schools, but this is not to underestimate the important, and separate, roles and responsibilities of those in management positions in schools.

Both Donaldson and the EIS thus made use of the concept of teacher leadership, but with potentially different meanings. These developments culminated in significant revisions to the Standards governing the professional practice of Scotland’s teachers. The Standards specify the professional values and commitments, knowledge and skills, abilities and actions of Scottish teachers (GTCS 2012b: online). The leadership role outlined in the Standards reflects both the longer term government concern to stimulate workforce reform and engagement with the school improvement agenda seen in TP21 and a desire on the part of the profession to develop teacher agency and influence (GTCS 2012b: online):

All teachers should have opportunities to be leaders. They lead learning for, and with, all learners with whom they engage. They also work with and support the development of colleagues and other partners. Different forms of leadership are expressed across the suite of Professional Standards including leadership for learning, teacher leadership and working collegiately to build leadership capacity in others.

A number of related policies emphasise the creative leadership potential of teachers. Education Scotland, the arms-length government-funded body charged with both improving and inspecting Scottish education, made this new expectation of ‘teacher leadership’ explicit in their strategic plan (Education Scotland 2013b: 25):

Curriculum for Excellence, the most comprehensive reform of education provision from pre-school to adulthood in a generation, is explicitly designed to give practitioners much greater professional freedom in deciding exactly what and how they teach to motivate and develop their learners. … detailed decisions about service delivery increasingly rest with front-line professionals and local bodies in the belief that they are best placed to decide how to achieve outcomes in local circumstances.

Echoing this, the Scottish Government established and funded in 2014 a Scottish College for Educational Leadership (SCEL), whose mission is to:

… work in partnership with the profession and other national organisations to deliver an education system … where every teacher … benefits from excellent leadership learning and development … (SCEL 2017: online)
In the recent consultation paper on proposed changes to the governance of Scottish schools, the Scottish Government (2016: 9) underlined the intention that local professionals were best placed to make situationally specific decisions on practice:

[W]e want to see more decisions about school life being driven by schools themselves starting with a presumption that decisions about children’s learning and school life should be taken at school level.

This expectation that all teachers participate in and contribute to leadership reflects the internationally prescribed distributed perspective on leadership (Spillane & Coldren 2011). In this way, ‘global travelling educational leadership policy has been mediated by embedded Scottish practices and cultures, negotiated through consensual policy networks’ (Torrance 2018: 4). However, although the broad thrust of this policy intention is clear, different potential elements of ‘teacher leadership’ are left in an uneasy tension. Autonomy, agency and the exercise of social influence – all key ingredients in the ‘teacher leadership’ literature and characteristic of the EIS definition of teacher leadership – are missing from the new Standards for teachers in Scotland, resulting in a contained and poorly articulated expression of teacher leadership. Expressions of teacher leadership in the Standard for Full Registration (GTCS 2012c), for example, are limited to building working relationships. As Torrance and Forde (2016: 118-119) identify, it is only in the Standard for Career Long Professional Learning that such expressions are extended to include the development of curriculum and pedagogy, albeit within a restricted conceptualisation of practitioner enquiry:

The construction of teacher leadership is premised upon collaborative practice and this form of leadership evolves from knowledge to action and from participating and exchanging with peers to explicitly influencing others and directing activities. … there is no reference to exercising social influence.

Moreover, the Standards continue an on-going policy fudge across the related activities of leadership and management, such that teacher leadership may be seen to involve both delegated responsibilities and accountabilities within a management hierarchy, along with influence resulting from expertise, owned by the teacher, independent of any management role. Assigning ‘leadership’ of pedagogy and curriculum development to teachers as part of workforce reform, through the conveyed status of expert practitioner, may seem logical for policy makers. Indeed, part of the attraction for politicians is that responsibility for pupils’ success or failure can be assigned to teachers (Humes 2000). However, tensions between different interpretations of ‘teacher leadership’ feed into different practice narratives across the Scottish school system. Without a fuller, agreed conceptualisation, how ‘teacher leadership’ is seen from the ‘bottom up’ may be very different from how it appears from the policy maker’s desk.
The Study

This article reports on a small-scale mixed methods study of Scottish teachers following leadership development programmes, with both theoretical and practical components – teachers committed, therefore, to developing their leadership capacities. Aspects of the study, using part of the Scottish data, were reported in an earlier paper comparing parallel teacher leadership development experiences in Scotland and New Zealand (Torrance, Notman & Murphy 2017). This article focuses in greater detail on the particular themes that emerged from the Scottish study.

The data set was generated from two 20 credit equivalent postgraduate Masters courses, funded by the Scottish Government and delivered jointly by University and Local Authority staff. The first – Developing As A Leader (DAAL) had a ‘short and fat’ design (October 2014 and June 2015), supporting 22 participants who drew on existing leadership experience. The second – Developing Teacher Leadership (DTL) – had a ‘long and skinny’ design (October 2014 to January 2016). Although most DTL participants had less leadership experience, in practice no noteworthy differences emerged in the data, as evaluated in two reports compiled for key stakeholders (Torrance & Murphy 2016a, 2016b). The results reported here are therefore based on the combined data set.

The research study design approximated Maykut & Morehouse’s (1994) adaptive model. The interpretive paradigm within which the study sits accepts that multiple realities exist for both observer and observed (Morrison 2002). Data collection involved open-ended questionnaires – pre-course (all 45 participants) and post-course (32 of 45 completed; completed anonymously) – both of which probed motivations, understandings and experience of teacher leadership. Fourteen individual semi-structured interviews (selected from eight DTL and nine DAAL volunteers), collected rich qualitative data and contextual insights and were conducted on site or by telephone. Participants were encouraged to speak in their own terms (albeit informed by their reading and participation in the course) referring to their own experience, rather than seeking to demonstrate knowledge of the literature. They validated the transcribed responses. While there was a spread of gender, sector and range of leadership experience in each cohort, the interviews produced rich individual insights rather than reliably generalisable data.

Constant comparative analysis of the data ran concurrently with data collection in a process of inductive cross-case analysis (Miles & Huberman 1994). Although the small sample size and participant self-reporting prohibit generalisations, the insights gained into teachers’ leadership thinking and experiences may have relevance across and beyond Scotland. As in all Masters-level learning, there was an expectation that participants engaged in processes of policy interrogation, exploration of theory and critical reflection on practice. A number of themes emerged sufficiently clearly to be reported below, then discussed in terms of their implications for future policy and practice.
The Course Participants

The following tables detail the key characteristics of the two groups of course participants and of those, the respondents contributing to the data set available for analysis (questionnaire and interview). The majority of quotations included in the analysis which follows were taken from the interview responses.

**Table 1: Developing teacher leadership overall course cohort data – 23 participants**

<table>
<thead>
<tr>
<th></th>
<th>Age</th>
<th>Length of Service</th>
<th>Gender</th>
<th>Sector</th>
</tr>
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<tbody>
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</tr>
<tr>
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<td></td>
</tr>
<tr>
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<td>6.1</td>
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<td>31</td>
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<td>Primary Sector</td>
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<td>Secondary Sector</td>
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<td>Nursery Sector</td>
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</tr>
<tr>
<td>Primary &amp; Secondary Sector</td>
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<tr>
<td>Special Education (Primary) Sector</td>
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**Table 2: Developing teacher leadership course participant contributors to analysis data sets**

<table>
<thead>
<tr>
<th></th>
<th>Entry Questionnaire</th>
<th>Interview</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
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<td>17</td>
</tr>
<tr>
<td>Gender</td>
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<td>5 F / 2 M</td>
<td>12 F / 5 M</td>
</tr>
<tr>
<td>Sector</td>
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<td>2 P / 5 S</td>
<td>6 P, 11S</td>
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<tr>
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<tr>
<td>Median Age</td>
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<td>6.1</td>
<td>7.2</td>
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<td>Median Service (years)</td>
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Table 3: *Developing as a leader* overall course cohort data – 22 participants

<table>
<thead>
<tr>
<th>Gender</th>
<th>Length of Service</th>
<th>Gender</th>
<th>Sector</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Female</td>
<td>14</td>
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<td>40.1</td>
<td>Median</td>
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</tr>
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<td>Secondary Sector</td>
<td>8</td>
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<td>Nursery Sector</td>
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<td>1</td>
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<tr>
<td>Special Education (Primary) Sector</td>
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<td></td>
</tr>
</tbody>
</table>

Table 4: *Developing as a leader* participant contributors to analysis data sets

<table>
<thead>
<tr>
<th>Entry Questionnaire</th>
<th>Interview</th>
<th>Course Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
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<td>7</td>
</tr>
<tr>
<td>Gender</td>
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<td>3 F / 4 M</td>
</tr>
<tr>
<td>Sector</td>
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<td>5 P / 2 S</td>
</tr>
<tr>
<td>Mean Age</td>
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<td>43</td>
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<tr>
<td>Median Age</td>
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<td>38</td>
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<tr>
<td>Mean Service (years)</td>
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<td>10</td>
</tr>
<tr>
<td>Median Service (years)</td>
<td>9</td>
<td>8</td>
</tr>
</tbody>
</table>

Cohort Comparison:
- *Developing As A Leader* participants were on average 7 years older and 6 years longer in post;
- *Developing As A Leader* participants were more likely to be primary teachers
Table 5: Course participant group comparison

<table>
<thead>
<tr>
<th>Interview</th>
<th>Developing Teacher Leadership</th>
<th>Developing As A Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/15 Female; 2/8 Male</td>
<td>3/14 Female; 4/8 Male</td>
<td></td>
</tr>
<tr>
<td>2/8 Primary; 5/14 Secondary</td>
<td>5/12 Primary; 2/14 Secondary</td>
<td></td>
</tr>
<tr>
<td>Course Evaluation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/15 Female; 5/8 Male</td>
<td>9/14 Female; 6/8 Male</td>
<td></td>
</tr>
<tr>
<td>6/8 Primary; 11/14 Secondary</td>
<td>7/12 Primary; 7/8 Secondary; 1/1 Nursery</td>
<td></td>
</tr>
</tbody>
</table>

Conceptualisations of ‘Teacher Leadership’

Teachers defined or discussed teacher leadership differently to forms of leadership with specific targeted responsibilities. It was a quality rather than a responsibility:

It’s really part of your identity as a teacher and not a job or a role you’re given. (DTL3)

The practice of teacher leadership did not require a title. It involved specific expertise and professional credibility, owned by the teacher, voluntary not instructed:

The individual has to be interested and passionate in whatever they’re doing, otherwise it doesn’t get done well if it’s pushed on to you and you don’t want to do it. (DTL12)

Some worried that the concept could be divisive if some teachers were seen to be ‘leaders’ and consequently others felt excluded:

The idea of a 'label' does make me feel uncomfortable as that introduces the idea of a them and us. (DTL22)

To avoid what were seen as the potentially exclusive characteristics of ‘leadership’, different terms such as active teaching and collegial working were suggested. One respondent extended the range of the concept in an inclusive way to include everyone in a school community:

I’m uncomfortable that it’s only for teachers... when you start talking about teacher leadership, others like classroom assistants and parents and janitors etc. might feel they are not involved. The term distributed leadership, once you define what it means, is more inclusive... e.g. cleaners can be leaders in their area... we need to be careful about the language we use and I don’t think TL is the correct term. (DAAL 8)

For many it was easier to say what teacher leadership was not. For example, most resisted the idea that teacher leadership was delegated, some complaining that headteachers were using the concept to justify increasing the range and number of delegated tasks. Some bemoaned the ‘flattening’ of the professional hierarchy which followed on from TP21’s removal of
‘layers’ of management, from secondary schools in particular (as previously discussed). Teacher leadership was, in this view, part of a pattern to save money - teachers being expected to undertake more delegated work without extra remuneration.

Many respondents were keen to separate ‘management’ from ‘leadership’. Management was perceived as staid, systems-related and less personal, concerned with paperwork, organisation, bureaucracy and the allocation of resources, conveying specific responsibilities and accountabilities. Leadership was perceived as open, flexible and practical, offering opportunity rather than controlling:

[W]ith leadership you need to believe in something and have a personal commitment to the values of the area involved whereas management is a list of tasks, organisation, paperwork… leadership is more personal than management – it’s about driving and engaging change that leads to improvement. (DAAL 21)

It was also recognised that teacher leadership could be negative in its influence, with teachers who ‘leave you feeling worse’:

[N]egativity about anything that anyone suggests, often saying things that undermine other people … dragging down their own potential and those of others. … It comes from bitterness or maybe problems outwith school … being treated badly themselves. (DAAL 7)

Given the strong practical focus of many definitions of teacher leadership, it is not surprising that respondents had much more to say about its practice, exemplifying rather than defining it:

For me it’s about teachers on the ground, at the chalk face, driving forward an initiative they see as important, to address pupils’ needs. (DTL 17)

Teacher leadership was found in modelling, in sharing, in showing, not telling:

It’s a way of working where you work collaboratively with your peers towards a common goal. (DTL23)

Teacher leadership operated through collegial peer influence (rather than ‘power’), putting pupils first, focused on practical solutions rather than complicated policy:

It’s about many different things – relationships, knowledge of people, knowledge of the school, being self-aware but having an awareness of other people and the impact of your actions … influencing colleagues, pupils, stakeholders to take the school forward. (DAAL 8)

For many respondents, ‘the kids’ came first:

[M]y focus is to do the best for the kids in my school … doesn’t have to be massive changes. (DAAL 1)

[T]o do what’s best for the school and its learners. (DAAL 8)
Those exercising leadership displayed an encouraging manner, generosity of spirit, a positive outlook. Some of the clearest descriptions were of role models, who were calm, passionate about education, sincere, trustworthy, with sound, well-articulated educational principles linking theory and practice, and strong interpersonal skills. They focused on what is best for children but tempered their idealism with practical realism. ‘The best leaders’ one respondent said, ‘are the nicest people’:

One teacher started at the same time as I did at X Academy... it’s just her whole manner, her personality, always positive thinking, intuitive about pupils’ needs and interested in all pupils. She’s always keen to try things and use new ideas, keen to share and work with other staff members ... She’s someone who can learn in all situations and wants to improve. (DAAL 14)

On the other hand, teacher leadership in action could be negative in character, with some teachers displaying insincerity, untrustworthiness, disinterest in others’ viewpoints, telling not showing. These teachers were seen to be in it for self (e.g. promotion) not pupils and could abuse their status or power.

Teacher leadership, as practised in Scottish schools, was seen as a change still in process:

When I started teaching no-one talked about teacher leadership and now it’s become a kind of expectation... e.g. newly qualified teachers ... they’re hungry for it. ... It’s become a standard interview question, even for an unpromoted post now, ‘what leadership tasks have you taken on? How have you demonstrated your leadership skills?’ .... It’ll be interesting to see how that goes in the future... ten or fifteen years down the line ... With younger teachers coming through it’s already blurring... they’ve seen themselves as leaders from the get-go. (DTL13)

**Motivations in Teacher Leadership**

Only seven out of the 45 respondents in the initial questionnaire mentioned extrinsic motivating factors behind their teacher leadership aspirations, such as increased possibilities of future promotion. One complained that delegated responsibilities under the heading of ‘teacher leadership’ did not attract additional remuneration:

[T]here’s no reason why leadership activities should not be paid ... [it] should be in there somewhere or many will think this is just about getting jobs done on the cheap. (DAAL 7)

Intrinsic motivations were much more common. For some there was pride, excitement and a sense of ownership in potentially making a difference on a wider stage, something that was not ‘imposed’. Almost all specifically talked about developing their practice for the benefit of pupils, exerting an influence beyond their own classroom:
[M]y goal is genuinely to improve my own practice, that of others and to ensure that the outcomes for pupils are better. (DTL 13)

It’s about developing me as a teacher [while] sharing my knowledge and experience as a teacher with others. I want to influence the way the school develops and improves ... that’s a huge thing – not just to support an individual child but to make a difference for the majority of pupils. (DAAL 14)

A generally positive optimistic tone suffused these responses:

It’s about taking the lead and being positive … I’ve seen so many brilliant teachers do just that. (DTL 17)

Some motivations were more specific to the individuals involved. One was excited by developing collaborative work – initial teacher education focused too much on the teacher as an individual. One was motivated by the example of other ‘brilliant teachers’. Others mentioned specific areas of interest or enthusiasm where they wanted to lead e.g. ‘growth mindset’ and ‘numeracy’.

Such intrinsic motivations could be harmed by external delegation of leadership tasks that a teacher might feel unable or unwilling to fulfil, compounded by lack of appreciation. The teacher had to ‘own’ their motivation:

… local headteachers have given me and the others a task to complete but if that’s not something you’re into yourself you’re not as enthusiastic. (DAAL 8)

… at a personal level, retaining motivation when no-one says ‘well done’... That’s it – you finish one thing and there’s more to do. (DTL 17)

**Cultural Factors Influencing the Development of Teacher Leadership**

Cultural factors influenced the developing practice of teacher leadership, both in the school community – where informal chat, old habits and interpersonal factors were at work – and nationwide, where the changing professional culture of the Scottish teaching profession was exerting local influence and new teachers were expected to play a leadership role within their classroom and through collegial influence in special areas of expertise:

I have hope in the new teachers and the new input they are getting ... but … for people who have been teaching for twenty years of maybe thirty it is like, ‘what seriously you really ask me to do what? I didn’t sign up for this’ and they are just trapped. (DAAL 21)

Contrastingly one respondent, a late entrant to teaching, was less hopeful. Initial teacher education still emphasised the individual too much, with little preparation for collegial approaches:
One of the biggest things is that when you qualify as a teacher and the training that comes afterwards, there seems to be an expectation that we'll all just work together and everything will be hunky dory. (DTL 23)

These teachers reported that there was still a long way to go before national policy messages were translated into local practice. Many teachers were said to be unaware of the new expectations within the Standards:

Although it’s now embraced in the Standards, most of the staff in my school didn't actually know that. (DAAL 6)

It’s therefore difficult for people to take on … teacher leadership … when it is not well understood… there isn’t the intellectual conceptual background for it. (DAAL 7)

At least in part, this was a consequence of policy overload:

There’s so many initiatives coming from a higher level. (DTL 12)

Even where the new Standards were in use, there was a fear expressed that they may be used in a ‘tick box’ manner (‘what leadership responsibility have you undertaken this year?’). Moreover, the experience and opportunities of the teachers in an individual school were likely to be profoundly influenced by the interpretations of teacher leadership developed locally through interpersonal relationships, local understandings and the influential words and deeds of specific teachers – the local school culture.

For a culture to develop that facilitated teacher leadership, it was deemed essential to have a supportive headteacher and management team, setting a tone in which creative ‘bottom-up’ teacher leadership was valued. Yet in the experience of the participants in these programmes, Scottish schools present a very chequered picture. ‘In my school the concept of teacher leadership is very undeveloped’ was a not untypical response. Respondents also mentioned managers who did not understand it, or felt threatened by teacher leadership.

Those practising teacher leadership must be allowed to try things out, rather than ‘hung out to dry’ (a phrase used by two interviewees) if initiatives were not successful. Trust was vital:

There has to be an open and trusting relationship between teachers and formal leaders if teachers are to get the right kind of support. (DAAL 6)

Collegiality and trust are the key words. (DAAL 21)

Where these were missing, teaching colleagues could also make life difficult:

When you put your head above the parapet, you get a bit of … ‘they’re doing us a disservice because if that gets embedded then we’ll all end up having to do that’. (DTL 13)

Some colleagues contribute to the them/us culture and meet new ideas with a kind of hardened cynicism. (DTL 22)
Such cultural factors influencing teacher leadership interacted with management systems to facilitate or inhibit the flourishing of teacher leadership.

The Role of Management

Managers needed to make time and resources available and to enable effective shared communication within which, the headteacher’s support was made clear. The poor management of leadership activities could lead to too many teachers competing for time, resources, influence and priority, rather than collaborating:

[W]ithout effective systems to fit things into the vision … you get these manic pockets around the school where you find out ‘oh so and so’s doing this’ and then ‘oh so and so’s doing that’ and someone else is doing something else … things popping out of nowhere, things happening here, questionnaires being distributed there … if somebody … isn’t taking the reins and evaluating what’s going on, it becomes disconnected, sporadic. … it can become like a kind of runaway train … you need the freedom but it does need to be managed. (DTL 13)

Work overload was identified as a key inhibiting factor, whether emanating from the top-down national policy overload or from more local pressures:

In (X High School) 80% of the working groups are suggested by the Depute Headteachers and Principal Teachers. How do you turn it round so that 80% can come from the teachers who work directly with the pupils and know the issues? (DTL 23)

Many more challenges than opportunities were identified at school level. These all needed good management:

• potential mismatches between school and teachers’ priorities
• favouritism in the distribution of leadership opportunities
• balancing the time needed for leadership activities and the time needed for teaching
• stress (a little was seen as good, too much as bad) and consequent burnout
• worries about budgets – current levels of support for teacher leadership development might not be sustained.

But teachers also had to accept responsibility. It was not a ‘one way street’. A teacher exercising leadership had to be seen as credible by their peers.

Despite many such concerns, the overall tone of the interviews was critically positive – these teachers wanted more responsibility, to have a wider impact in their school community for the benefit of their pupils.
Professional Development through Teacher Leadership

Despite any difficulties encountered in contextual practice, both sets of respondents reported enhanced professional development. They understood better Scottish policy development and the role of the teacher Standards. The professional literature was perceived as stimulating. Greater knowledge of research increased confidence in developing and expressing views and even influenced practice. A few acknowledged difficulty in finding the time to read and for some the literature was seen as difficult to access. All respondents indicated that the course enhanced their self-evaluation, with beneficial effects on their practice:

I have identified areas of strength and weakness in my leadership. (DTL 6)
It has really changed my mindset regarding my practice. (DTL 24)

All felt generally better prepared for leadership, with a stronger, more confident professional identity:

Nothing is going to knock my change in understanding/thinking. There has been a fundamental shift in my attitude. I will not get disillusioned with the idea of teacher leadership. (DAAL 7)

The collegial character of teacher leadership – the agency and power of teachers working together – was often mentioned. However it was also felt that the opportunity to learn and develop passed by those who needed it most:

[T]he people who end up doing this kind of stuff are the people who would be doing this stuff anyway... they’re the people who are open to it. The people who need it, don't do it. (DAAL 1)

For some, the continuing tension between teacher leadership as a general concept and specific leadership roles/tasks remained contentious.

[T]he more I see myself in a teacher leadership role, the more aware I am of it being an uneasy position. It makes me wonder about how sustainable teacher leadership is for an individual – could an individual remain as a ‘teacher leader’ throughout their career without being seen as a puppet? Or as ‘hogging’ all the limelight? (DTL 22)

Discussion and Implications

Although the teachers in this study were committed to learning about and developing their leadership, they identified tensions in the articulation and practice of teacher leadership. Both literature and policy fudge the concepts of ‘teacher leadership’ and ‘teacher leader’. The former suggests more fluid and ‘bottom-up’ leadership practices – autonomy, agency, creativity, situational judgement – owned by and open to all teachers; the latter suggests specific leadership roles or tasks assigned to some teachers only. The revised Standards, a policy tool for workforce reform (Torrance & Humes 2015) to which all Scottish teachers are
meant to consult for their on-going professional development, draw loosely from ‘teacher leadership’ and ‘practitioner enquiry’. The concept of ‘policy fudge’ is used by Murphy & Raffe (2015: 155) to encapsulate a characteristic aspect of Scottish educational policy, which has both advantages and disadvantages.

Policy ‘fudge’ – vagueness about policy goals and strategies – can be helpful, allowing parties with different views to find common ground. It can reflect the fuzzy nature of a service that has multiple aims … Fudge, however, can cause damage … [it] may reduce conflict but it also reduces clarity.

It could be argued, that the policy fudge in the conceptualisation and practice of teacher leadership in Scotland was intentional – representing a political compromise. Teaching Scotland’s Future (Donaldson 2010: 5) proclaimed, ‘There is an urgent need to challenge the narrow interpretations of the teacher’s role’. The policy implementation documents that followed did little to take up that challenge. While the presentation of teacher leadership as unproblematic on the one hand side-stepped the need for challenging conversations at policy level, on the other hand it simply shifted the challenge to the contextualised practice of teacher leadership, in which hierarchical and informal leadership performing different if complementary roles, are now expected to intuitively coexist in harmony within a distributed perspective. In so doing, the macro level fudge has become a micro level issue, where there is no common understanding between teachers and managers of what teacher leadership involves. Such a common understanding would recognise the complex interplay between bottom-up leadership, focused on the leadership of learning and top-down (delegated/distributed) leadership, focused on the overall strategic direction of the school.

Although a supportive culture (Angelle & Teague 2014) legitimises and enables informal leadership, culture is not in itself enough. In schools where there is support for teacher leadership activity but it is poorly managed, ‘manic pockets’ of practice can develop. Good management develops common understandings, but also clarifies priorities and recognises where space and time are needed.

Other policy initiatives have failed to address ‘who owns the space where teachers’ pedagogical expertise is recognised and collaborative processes are enacted’ (Torrance & Forde 2016: 122). On the one hand, Curriculum for Excellence (Education Scotland 2013a: 25) promotes itself as ‘explicitly designed to give practitioners much greater professional freedom in deciding exactly what and how they teach to motivate and develop their learners’. On the other hand, 20,000 pages of ‘advice’ were created to ‘support’ teachers with implementing the new curriculum and many teachers remain unclear whether or not they have the freedom to exercise their own judgement or must do as they are told (The Herald 2017). Underneath lies a question of whether every teacher has capacity to lead (Harris & DeFlaminis 2016). Scottish policy is also unclear on the relationship of leadership to management.
The highly motivated teachers in this study grew in confidence, when their professional learning about teacher leadership as a concept was scaffolded, taking ownership of and practising teacher leadership. They perceived of their enthusiasms, their specialities, their interests as very different from management. But it was not only these teachers who were exercising leadership power in their school settings. Many referred to colleagues whom they saw as having a negative leadership influence, holding back positive developments. Teacher leadership power is thus more fluid and flexible but also more volatile and unpredictable than the power and authority vested in school management layers, in the structures of accountability and responsibility for Scottish schools, and in the local authorities that employ teachers. Within a distributed perspective, further discussion is needed around who is responsible and accountable, for what and to whom?

At the macro level, these issues could form part of the current national discussion on the governance of Scottish school education (Scottish Government 2016). The consultation phase (now closed) could have provided the ideal vehicle for an informed civic and professional discussion of the character and responsibilities of the teacher as a public professional: To whom is s/he accountable and in what measure? To their clients – the pupils and parents? To their employers – the elected local authorities? National government, and its agencies and inspectors who set policy, provide most of the resources and have often required compliance. How are tensions in these sometimes conflicting responsibilities and accountabilities best resolved, in a manner which liberates the professional creativity and agency of the teacher? The professional Standards – both as policy implementation tools, and as supports for teachers’ self-evaluation and professional learning (Forde & Torrance 2016) – could play a role in clarifying the meaning of teacher leadership. It remains to be seen whether the governance review will lead to a clearer, and more widely understood, conceptualisation of teachers’ leadership or whether a typical Scottish policy fudge will continue to cause the problems and tensions typical of the practice realities experienced by the teachers in this study.

Given the confusions, clarifications, competing interpretations and different interests at play at the different levels of the Scottish school system, competing interpretations of teacher leadership may well continue to sit side by side in tension. The different perspectives on teacher leadership in the literature and policy will thus continue to create practice tensions and dilemmas for individual teachers. These tensions and dilemmas, evident in the experiences of our teacher leadership respondents, were perceived as both potential challenges to be overcome and as potential obstacles hampering further development. School managers, by helping to develop a clear consistent local understanding of ‘what teacher leadership means, and how it works in our school’, may help to resolve some of the tension at local level, but teachers themselves have a proactive role to play. It was evident in the responses of the teachers in this study that the professional development programme provided a language and confidence to embrace a stronger collegial professional role and,
despite challenges and obstacles encountered, a willingness and enthusiasm to take on leadership responsibilities and exercise situational judgement for the benefit of their pupils.

**Conclusion**

Local developments in Scotland reflect a wider global policy movement to re-professionalise teaching through new and enhanced expectations of the teaching profession, utilising discourses such as ‘teacher leadership’ and ‘expert practitioners’, encouraging the active engagement of teachers in school improvement processes. Tensions between differing conceptualisations of teacher leadership, and its relationship to formal management hierarchies, run through both the literature and the experiences reported in this Scottish study. In the absence of a clear, coherent Scottish account of the concept and consequent practice implications of teacher leadership, the complicated interactions between formal and informal leadership expectations will continue to cause tensions in the relationships and practices of individual school communities. In enacting policy into practice, the teachers in this study made sense of normative/aspirational theory and policy tools, whilst encountering practice realities. Their experience demonstrates both the school-level tensions encountered if some teachers have a greater understanding of policy intentions than their peers and, in some cases, their managers, but also the positive possibilities of liberating the creativity and professional agency of teachers.

**References**


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Developing Early Career Teachers’ Leadership Through Teacher Learning

Elson Szeto and Annie Y. N. Cheng

Abstract: Developing early-career teachers’ leadership is a part of teacher learning both inside and outside schools. Teachers’ learning processes have not yet been explored in relation to principals’ delegation and teachers’ recognition of leadership roles in a culturally hierarchical structure. This article discusses a cross-case study of four early-career Chinese teachers’ experiences of leadership development in the Hong Kong school system. After teaching for five years, the teachers’ leadership capabilities are reflected in their functional roles, membership, and promotion in their schools as approved by their school principals. Implications for teacher leadership development through teacher learning are also discussed.

Keywords: early-career teachers, principals’ delegation, boundaries of teacher leadership, teacher learning

Introduction

In the changing educational context, bottom-up teacher leadership has globally emerged over the past two decades. This trend has led to a variety of research on teacher leadership in Western societies focused on school improvement, professional learning communities (PLCs), professional development, and principals’ perspectives on teacher leadership development (Alexandrou & Swaffield 2012; Harris 2010; Harris & Muijs 2005; Moller & Pankake 2013; Xie & Shen 2013). This in turn has led to an increasing interest in the development of teacher leadership for changes to school practice (Anderson 2012). Principals’ delegation and facilitation are vital for leadership development through teacher learning in school communities (Bouwmans, Runhaar, Wesselink & Mulder 2017; Crowther, Ferguson & Hann 2009). This study explores the extent to which this type of learning can be attributed to teachers’ aspirations to explore, experience, and perform leadership roles for their professional development in Chinese schools in Hong Kong.

A distributed perspective of teacher leadership argues that principals are delegators and facilitators for teachers to perform as leaders for school improvement and enhancement of
student learning (Harris 2003; Spillane 2006). There are various ways to assign leadership roles to teachers, such as formal and informal delegation (Moller & Pankake 2013; Yost, Vogel & Liang 2009). Teacher leadership is embedded in professional learning as a developmental process through which teachers can be inspired and empowered for professional growth (Kwakman 2003; Muijs & Harris 2003; Timperley 2011). However, the practice of principal-delegated or assigned teacher learning activities supporting teacher leadership development in Asian societies is characterized as hierarchical, with a top-down structure (Hofstede 2001). The developmental process of teacher learning in schools is yet to be fully explored in this context.

Given its roots in the distributed leadership perspective, the role of the principal is widely perceived as critical for developing teacher leadership roles at different levels in a specific school (Spillane 2006; Volante 2012). As such, teacher learning is an effective way of expanding teachers’ professional repertoires through learning activities inside and outside schools (Avalos 2011; Poekert 2012). This argument has yet to be integrated into studies of teacher leadership development. In particular, the kind of learning through which teachers’ leadership skills are explored in a hierarchical school structure has been neglected in the Chinese context. To explore this uncharted research area, this study addresses three research questions: (1) What types of teacher learning are teachers involved in inside and outside schools? (2) How do teachers explore their roles across the four boundaries of teacher leadership in schools? (3) What do teachers perceive as recognition of their leadership roles after five years of practice?

Theoretical Framework

We adapted a theoretical lens of teacher leadership development from previous research on principal–teacher interactions and teacher leadership (e.g., Muijs, Chapman & Armstrong 2013; Szeto & Cheng 2017). We extended the framework to explore the effects of teacher learning on their leadership development. Many empirical studies have shown that teacher leadership can be developed through individual, collective, and collaborative teacher learning (e.g. Bouwmans et al. 2017; Poekert 2012). Our theoretical framework is grounded in the effects of principal–teacher interaction on teachers who might aspire to leadership roles, regardless of whether these roles are formal or informal (Katzenmeyer & Moller 2009; Taylor, Goeke, Klein, Onore & Geist 2011).

As such, we argue that principal-facilitated or teacher-initiated teacher leadership development needs to be mediated through teacher learning when teachers begin teaching in schools. Principals assign and/or facilitate teacher learning activities that may have different effects on different teachers’ individual and collective growth (Avalos 2011; Crowther et al. 2009). Thus, principal-assigned/facilitated teacher learning can have (1) an ‘allowing’ effect on teachers’ professional development, (2) an ‘empowering’ effect on teachers’ capabilities
and capacities, and (3) an ‘inspiring’ effect on teachers’ aspirations to be recognized as teaching leaders (Szeto & Cheng 2017). These effects are embedded in the teacher learning.

**Concept of Teacher Leadership**

The concept of teacher leadership is rooted in the notion of distributed leadership (Harris & Spillane 2008). Teachers can perform transformational leadership roles, collaboratively enhancing students’ learning outcomes for school improvement. Such distributed, shared, collaborative, or transformational work reflects a blurred distinction of the power relationship between school leaders and teachers in a school hierarchy (Gronn 2000). This can open up the possibility of transforming educational practice through, within, and beyond schools (Frost 2008; Harris 2003; Muijs et al. 2013; Pounder 2006; Yost et al. 2009). Thus, all teachers can become leaders, even via different professional learning and growth trajectories. However, there is no consensus on the definition of teacher leadership (Alexandrou & Swaffield 2012; Neumerski 2013). Understandings of teacher leadership are continuously evolving, in formal and informal leadership roles in different school contexts. Katzenmeyer and Moller (2009) referred to teacher leadership as teachers’ practices demonstrating new teaching methods, sharing knowledge and skills, and leading school improvement as members of school task forces. Similarly, Muijs et al. (2013) conceptualized teacher leadership as leading roles across boundaries in schools.

**Boundaries of Teacher Leadership Development**

Teacher leaders are regarded as agents for change in school improvement and quality learning and teaching, in formal and/or informal roles (Lieberman & Mace 2009). Their leading roles can go beyond in-classroom leadership and relate to student learning, subjects, other teachers, and school innovation (Muijs et al. 2013). This reflects teacher leadership, which stretches across four boundaries: (1) the classroom, where teachers lead other teachers outside their own classroom; (2) the subject, in which teachers lead work with their colleagues on curricular and instructional issues; (3) the team, in which teachers lead issue management across year or curricular groups; and (4) the organization, in which teachers operate beyond the school by leading cross-school initiatives for improvement. The key question is this: how do teachers find ways to develop their leadership in the schools in which they practice? We argue that this is a developmental process through which teachers learn to grow professionally in individual school contexts. Teachers can individually and collectively explore self-initiated leading roles, or those delegated and facilitated by their school principals (Bouwmans et al. 2017; James & McCormick 2009; York-Barr & Duke 2004). Thus, we believe that each school is a learning community in which teacher learning contributes to developmental processes that support teachers’ participation in activities that may cross the aforementioned boundaries (Cheng & Wu 2016; Kools & Stoll 2016; Muijs et al. 2013). However, this depends on whether schools can create favorable conditions for teachers to aspire to leading roles (Mangin 2007;
Muijs & Harris 2006, 2007). If they succeed, teacher leadership development is likely to be encouraged (Kools & Stoll 2016).

**Mediating Effects of Teacher Learning on Teacher Leadership Development**

Teacher learning under the umbrella of professional development is different from teacher learning that relies entirely on external resources such as seminars or workshops (Lieberman 1995). Recent school-based teacher learning practices comprise learning in practice, co-learning with teachers from the same department, and everyday responsibilities mainly assigned by principals (Gao & Wang 2014). Success in teacher learning seems to depend on school conditions that support mediation of learning activities and inspire teachers to observe and explore various leading roles (Ingvarson 2009; Jurasaite-Harbison & Rex 2010; Kwakman 2003; Thoonen, Sleegers, Oort, Peetsma & Geijsel 2011). Thus, ‘[m]ediations, in most education processes, are like springboards that provide the impetus for moving from one point to another, interweaving [the] roles of the teacher and the principal’ (Avalos 2011: 16). A distributed leadership perspective of delegating new roles to teachers or shifting work can reduce tension and hierarchical conflict inside schools (Spillane & Camburn 2006). The key is building a culture of trust between teachers, and between principals and teachers, in the process of teacher learning (Clausen, Aquino & Wideman 2009).

**Towards a Theoretical Lens for Teacher Leadership Development**

This study focuses on teacher leadership development across the four boundaries in relation to teachers’ participation in learning activities that are either assigned by principals or self-initiated. Figure 1 displays a theoretical lens for teacher leadership development in the process of teacher learning, through which we can examine the effects of teachers’ self-initiation and principals’ delegation and facilitation of professional growth on teacher development.
**Methods**

We adopted a cross-case study approach to explore teacher leadership in teachers’ professional development processes facilitated by principals in natural school settings (Yin 2014). Teachers’ experiences in developmental processes in their first five years of practice are important for shaping their leadership, through which schools and student learning can be improved. Interviews were our main source of data, supplemented with documentary evidence searchable on school websites, such as school profiles, school development plans and other professional development artefacts (Creswell 2012). The teachers who accepted our invitation participated in individual, semi-structured interviews. To capture their 5-year development, each participant was interviewed three times: in their graduation year, at the beginning of their third year of teaching, and at the beginning of their sixth year of teaching. On average, each interview lasted 90–120 minutes and was digitally recorded, supplemented with field notes, and transcribed verbatim.

The interviews captured the participants’ self-reported experiences and perspectives of teacher learning for professional growth that shaped their teacher leadership during their first five years of teaching. The interview questions also covered their perceptions of their principals’ roles in facilitating professional development activities and the effects of their
participation on their leadership development. We also used open-ended questions for the participants who described their leadership roles and aspirations for promotion with regard to their principal’s recognition. The participants cross-checked the transcripts for accuracy. Documentary evidence was used to gain a deeper understanding of teacher leadership development in continuing professional learning activities in schools.

Participants

Drawing from a longitudinal study of a group of 20 teachers, we followed the leadership development of four early-career teachers \((n = 4)\), one male and three females, in the first five years of their practice. As graduates from the same cohort of a Bachelor of Education (BEd) program at a Hong Kong university, they had the same educational background. They had the same number of years of teaching experience in different types of schools. We hoped their experiences would enrich our understanding of the developmental process of teacher leadership in professional learning in different school contexts. We followed the participants’ leadership development from their first teaching appointment. They taught various subjects, including English Language (ENG), Physical Education (PE), and Business, Accounting, and Financial Studies (BAFS). Teacher 1 remained at the same school and Teachers 2, 3, and 4 moved to different schools.

Three of the participants taught in mainstream secondary, primary, and special schools, and one taught in a primary school under the Direct Subsidy Scheme (DSS) in Hong Kong’s Chinese school system. Under the central administration of the government through the Education Bureau (EDB), mainstream schools include (1) government schools fully funded and managed by the government; (2) aided schools operated by non-profit sponsoring bodies and more than 90 per cent funded by the government; and (3) special schools which refer to schools for children with special education needs (SEN) such as visual impairment, hearing impairment, physical disability, social development, and intellectual disability. DSS schools also receive government funding but have a high degree of autonomy in their administration and curriculum choices. Table 1 summarizes the participants’ profiles in the period from 2011 to 2015.
Table 1: The participants’ profile (2011 to 2015)

<table>
<thead>
<tr>
<th>Teacher</th>
<th>Gender</th>
<th>First School*</th>
<th>Second School</th>
<th>Main Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Female</td>
<td>Secondary (from the 1st year)</td>
<td>–</td>
<td>BAFS</td>
</tr>
<tr>
<td>2</td>
<td>Female</td>
<td>Secondary (the 1st &amp; 2nd year)</td>
<td>Secondary (from the 4th year)</td>
<td>PE</td>
</tr>
<tr>
<td>3</td>
<td>Male</td>
<td>Primary (the 1st year)</td>
<td>Special (from the 2nd year)</td>
<td>MATH</td>
</tr>
<tr>
<td>4</td>
<td>Female</td>
<td>Primary (the 1st year)</td>
<td>DSS Primary (from the 2nd year)</td>
<td>ENG</td>
</tr>
</tbody>
</table>

* All schools except for the DSS primary school are aided schools. ‘First School’ refers to the school the teachers taught at after their graduation, and ‘Second School’ is the next school the teachers moved to in the 5-year period.

BAFS = Business, Accounting, and Financial Studies; PE = Physical Education; MATH = Mathematics; and ENG = English Language.

**Data Analysis**

We conducted a thematic analysis of the interview transcripts triangulated by the documentary evidence. We developed categories of emergent themes through an iterative process based on the participants’ trajectories of developing leadership roles in teacher learning activities, facilitated by their principals or self-initiated in their 5-year practices. We first identified the participants’ developmental experiences since starting at the schools. Second, the analysis focused on additional roles assigned to the participants as their learning continued. We assessed the participants’ individual perceptions and the influences of their principals to reflect student learning and school development. The various types of roles were then grouped for further interpretation of the principals’ delegation affecting the participants’ leadership roles in the school-based learning processes.

We developed cases for each participant and conducted cross-case comparisons (Creswell 2012; Denzin & Lincoln 2003). The relevant case data were used for triangulation based on the thematic coding categories. Themes related to the effects of principals’ facilitation of teacher learning and the participants’ emergent leadership roles in the 5-year period were identified. This comparison led to identification of how principals’ facilitation of teacher learning affected the shaping of teacher leadership in different types of teacher development. We identified patterns that emerged within and across cases throughout the thematic analysis. The two researchers individually used NVivo for the thematic coding. The inter-rater reliability of the researchers’ coding in the Cohen’s Kappa coefficient was calculated as 0.79, indicating that they reached substantial agreement. The researchers subsequently discussed any coding differences to achieve consensus.
Findings

We present the findings on the four teachers’ perceptions of professional learning, growth, and leadership development delegated and facilitated by their principals, to answer our research questions. The developmental process of teacher leadership is discussed in three parts: (1) types of teacher learning inside and outside schools; (2) exploration of teachers’ roles across the four boundaries of teacher leadership; and (3) perceived recognition of teacher leadership roles after five years of practice.

Types of Teacher Learning in Schools

The four participants had been assigned to a range of similar teacher learning activities in their schools. These activities were classified into two main categories. The first type was conducted inside the school. The participants needed to participate in this type of activity, delegated and facilitated by their principals or other school leaders, alongside their everyday practices. The second type of learning activity took place outside the school. These activities were organized by external agents and included courses, seminars, and workshops provided by the EDB for teacher professional development, university graduate programs, or short-term professional development programs for teachers. Some activities counted toward teachers’ total hours of professional development within a designated time. Principals could recommend participants’ enrolment in these activities, but self-initiation was also common. Table 2 summarizes the types of teacher learning activities undertaken during the teachers’ 5-year practice.

Table 2: Types of teacher learning activities during the 5-year practice

<table>
<thead>
<tr>
<th>Teacher*</th>
<th>School</th>
<th>Mentorship</th>
<th>Class observation</th>
<th>Subject team sharing</th>
<th>Co-planning for teaching</th>
<th>Teacher PD day</th>
<th>Principal’s walkthrough</th>
<th>Learning/lesson study</th>
<th>EDB PD activity</th>
<th>Non EDB PD activities</th>
<th>Cross-school projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Secondary</td>
<td>√</td>
<td>√</td>
<td>–</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>–</td>
<td>√</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>2</td>
<td>Secondary</td>
<td>√</td>
<td>√</td>
<td>–</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>–</td>
<td>√</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>3</td>
<td>Special DSS</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>4</td>
<td>Primary</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>–</td>
<td>√</td>
<td>√</td>
<td>–</td>
</tr>
</tbody>
</table>

√ means the teachers participated in the activity during their first five years of practice in the school.

* Teacher 3 taught in a primary school in his first year, then moved to a special school in his second year.

* Teacher 2 taught in a secondary school for two years before a 1-year working holiday. She experienced very good collegiality in her first two years. She taught in another secondary school in her fourth year of teaching, but there was tension between the principal and teachers at this school.
The four teachers had participated in similar teacher learning activities, but had different experiences in their professional learning and growth. As early-career teachers, the participants were each assigned mentors in their schools. ‘I enjoy the close relationship with my mentor who is on the subject panel, because we are of a similar age and the only teachers teaching English in the school,’ Teacher 1 recalled, while Teacher 2 said, ‘She was just too busy to give me full support.’ Teacher 3 had a remarkable experience in his first and second schools. He said:

... the first primary school I taught in required me to attend a 120-hour professional development course on SEN in the first year, jointly offered by the EDB and the university. In the second year, I moved to a special school where I was assigned an experienced mentor and attended a year-round induction program. These on-the-job learning experiences were extremely helpful and practical for my professional growth.

The four teachers were also required to participate in various learning activities inside their schools including class observation, subject team co-planning, co-teaching and sharing or activities for teacher development days. Walk-throughs conducted by principals during their teaching and class observation were the common challenges they experienced. ‘I was intimidated by my principal’s walk-throughs, because he only gave feedback on my teaching when he met me at the annual performance review,’ Teacher 4 sighed.

**Exploration of Teachers’ Roles across the Four Boundaries**

The participants were aware of potential leadership roles in teacher learning activities after 2–3 years of practice. If they were delegated to these roles, they had the opportunity to learn to lead in their professional growth. We analyzed each activity relevant to the individual boundaries of teacher leadership by grounding it in the teachers’ perceptions of the roles. However, this categorization might not have been as distinct as conceptualized in the framework adapted from Muijs et al. (2013). Variations in some activities could be placed at different boundaries (see Table 3). For example, the activity of ‘peer or subject team sharing’ was broken down into ‘peer sharing’ for the classroom boundary, ‘subject team sharing’ for the subject boundary, and ‘cross-subject team sharing’ for the team boundary. Each type of learning activity could be assigned by the principal and/or initiated by the teachers. Thus, patterns of leadership roles emerging in teacher learning characterized the opportunity to explore teacher leadership roles across the boundaries inside and outside the schools. Table 3 shows the exploration of teacher leadership roles across the four boundaries.
Table 3: Exploration of teachers’ roles across the four boundaries

<table>
<thead>
<tr>
<th>Boundary</th>
<th>Teachers’ roles</th>
<th>School-arranged</th>
<th>Teacher-initiated</th>
</tr>
</thead>
<tbody>
<tr>
<td>TL1: Classroom</td>
<td>Class observation</td>
<td>P, VP, SP</td>
<td>STM T</td>
</tr>
<tr>
<td></td>
<td>Peer sharing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TL2: Subject</td>
<td>Co-planning for subject curriculum and teaching</td>
<td>SPH</td>
<td>–</td>
</tr>
<tr>
<td></td>
<td>Subject team sharing</td>
<td>SPH</td>
<td>STM</td>
</tr>
<tr>
<td>TL3: Team</td>
<td>Learning/lesson study</td>
<td>P</td>
<td>–</td>
</tr>
<tr>
<td></td>
<td>Cross-subject curriculum and teaching planning</td>
<td>SPHs</td>
<td>STM</td>
</tr>
<tr>
<td></td>
<td>Cross-subject teams sharing</td>
<td>SPHs</td>
<td>STM</td>
</tr>
<tr>
<td>TL4: Organisation</td>
<td>Mentorship programmes</td>
<td>P</td>
<td>–</td>
</tr>
<tr>
<td></td>
<td>Principal’s walk-through</td>
<td>P</td>
<td>–</td>
</tr>
<tr>
<td></td>
<td>Cross-school projects</td>
<td>P</td>
<td>–</td>
</tr>
</tbody>
</table>

P = principal; VP = vice principal; SPH = subject panel head; STM = subject team member; T = teacher; PD = professional development; ‘-‘ = nil.

As shown in Table 3, the four participants were directed to join in-school teacher learning activities. In their first year of practice, the participants might not have had a clear idea of the activities that could help them learn and grow as professional teachers and then as teacher leaders inside and outside their schools. Although the activities were mainly led by the principals, vice-principals, or subject panel heads, the teachers had opportunities to learn professional practice in their first or second years in the schools. They could then explore potential leadership roles across the four boundaries of school organization in later years. Regarding the classroom boundary, for example, Teacher 1 had the following experience after three years of practice:

The principal always meets me to talk about ways to improve my classroom teaching based on his walk-throughs and other class observations. He has shared valuable experience with me beyond my way of teaching in my classroom. I feel more confident in sharing my teaching experience with other colleagues.

Teacher 4 felt trust in teachers’ professional learning in her school because:

The principal believes that appropriate class observation should be conducted between members of the same subject team who should know each other’s practice well. I also share this view after gaining more professional experience.

Thus, Teachers 1 and 4 experienced professional growth beyond their own classrooms.

For the subject boundary, the four teachers reported experiencing a high frequency of co-planning for subject curriculums, teaching, and sharing. Teacher 3 worked in a team of four for the subject Practical Skills. His experience of professional growth came from subject meetings:
During the school year, we had four regular subject meetings and two interim meetings to evaluate our teaching progress and student learning outcomes. An annual subject report was also required. Despite the workload, I had the opportunity to play a leadership role in some meetings.

Contrarily, Teacher 2 was delighted to have a simpler team protocol in physical education than in core subjects such as languages or mathematics:

The subject is on a repeated cycle every year. The panel head only walks by and chats with us without a formal meeting. We always share our subject matter and teaching experience in the team as a different operational format.

The two teachers’ professional experiences reflected different opportunities to explore leadership roles within the subject boundary.

In terms of the team boundary, the four teachers reported participating in cross-subject curriculums and lesson planning and sharing in various formats. Teacher 3 treasured her principal’s welcoming of bottom-up proposals in the context of a special school:

We came up with the idea of connecting all the subjects under the theme of ‘good living’, and proposed it to the principal. Incidentally, this initiative won an award for excellence in teaching in an open competition with other schools in Hong Kong.

However, in Teacher 1’s school, the principal adopted school-wide lesson study:

The principal, subject panel heads, and the teacher partner came to observe and comment on your teaching. We tried our best to demonstrate quality teaching. However, these efforts were not recognized as part of the teachers’ appraisal.

The teachers expected recognition of their contributions to their profession, whether as a prize or written appreciation.

For the organizational boundary, the main source of the four teachers’ external professional development was the learning activities offered by the EDB.

Usually, we were assigned or recommended by the principals or the senior leaders to enrol in the activities relevant to our responsibilities in the school. (Teacher 2)

Regarding activities offered by non-EDB agents such as universities, Teacher 4 stated, ‘We may be recommended or can propose our own attendance.’ However, cross-school projects such as those instigated by the EDB were good opportunities for teacher learning outside school. Teacher 3 was the only participant to report that:

I enjoyed such a formal project not only to share my experiences with colleagues from other schools, but also to participate in the EDB project last year [the fourth year of his teaching].

He agreed that his principal’s recommendation, approval and support was the essential condition. Enthusiastically sharing his new EDB project, he said that this year, ‘the principal
supported me to represent our school in a new project on the LPF [Learning Progress Framework] for special schools so that I could play a leading role in my subject area.’

Perception of Recognising the Teachers’ Leadership Roles

The four teachers performed many functional responsibilities or roles over the five years. These ranged from the basic role of a class teacher or the middle role of a subject panel head or a curriculum leader to the advanced role of facilitator of a cross-school EDB project. Of the teachers, Teacher 1 performed the highest leadership role allocated by a principal, as a subject panel head in charge of class observation. Teacher 2 remained a class teacher of different grades, while Teacher 4 was assigned head of the English panel. With his principal’s support, Teacher 3 reached the highest leadership role: leading a cross-school EDB project team to study the Learning Progress Framework of Mathematics in the basic curriculum for special education. The participants perceived that their achievements would reflect their employment status in the schools.

Recognition of teachers’ contributions is subject to individual school leadership teams. Permanent employment status represents full membership of a culturally hierarchical school structure, while promotion to a senior rank means becoming a member of the leadership team. Thus, the four teachers first looked for permanent status and then promotion to senior ranks as their role development continued. Table 4 shows the recognition of the teachers’ leadership roles after their five years of teacher learning.

As shown in Table 4, the teachers demonstrated functional leadership roles across the four boundaries. After two years of learning, Teacher 2 was appointed to lead the discipline and guidance team:

To gain better knowledge in this area, I completed a certificate course on discipline and guidance offered by a university. The principal and the head of the discipline and guidance team want me to take up the leadership role.
**Table 4:** Recognition of the teachers’ leadership roles after the 5 years of teacher learning

<table>
<thead>
<tr>
<th>Teacher</th>
<th>Class Master/Mistress</th>
<th>Peer class observer</th>
<th>Subject Panel Head</th>
<th>Panel observer for subject teaching</th>
<th>Curriculum Leader</th>
<th>Facilitator of cross-school project</th>
<th>Role in Boundary of teacher leadership</th>
<th>Perceived recognition in the school*</th>
<th>A full member by employment status^</th>
<th>A teacher leader by formal rank**</th>
</tr>
</thead>
<tbody>
<tr>
<td>T1</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>–</td>
<td>–</td>
<td>TLs 1 &amp; 2</td>
<td>Contract</td>
<td>CM</td>
<td></td>
</tr>
<tr>
<td>T2</td>
<td>√</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>TL1</td>
<td>Contract</td>
<td>CM</td>
<td></td>
</tr>
<tr>
<td>T3</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>TLs 1 to 4</td>
<td>Permanent</td>
<td>AM</td>
<td></td>
</tr>
<tr>
<td>T4</td>
<td>√</td>
<td>–</td>
<td>√</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>TLs 1 &amp; 2</td>
<td>Contract</td>
<td>CM</td>
<td></td>
</tr>
</tbody>
</table>

^ The teachers’ contracts were renewed on an annual basis in this cross-case study. Depending on various factors, many schools initially offer new or experienced teachers a contract. Offering a permanent position is rare.

** The schools only offered the four teachers the initial rank of Certified Master/Mistress (CM) regardless of whether their educational qualifications entitled them to a higher rank of Graduate Master/Mistress (GM). Assistant Master/Mistress (AM) is the next rank after CM.

In the DSS primary school, Teacher 4 performed a similar functional leadership role to that of Teacher 2, but as an English subject panel head. However, she added, ‘I would not expect promotion or new leadership responsibilities because I treasure watching the students grow and develop from Primary 1 to 6.’

Similarly, Teacher 1 wanted to be a facilitator for student development, rather than an instructional leader. She commented, ‘As a facilitator, I can focus more on their attitudes and mindsets regarding their individual academic abilities for the coming public examination in Secondary 6.’

Thus, some teachers may not prefer leadership roles. However, the four teachers looked forward to gaining permanent status as recognition of their professional growth and contributions to their schools. As a facilitator of a cross-school project seconded to the EDB, Teacher 3 stated, ‘I can benefit my school and subject team for curriculum improvement and teacher development through the EDB project.’

As a subject panel head and the only teacher with a mathematics major in the school, he said, ‘I believe there will be promotion opportunities after I gain permanent status this year.’ Teacher 3 was confident that he would be recognized with permanent status, while his promotion to a senior rank, if successful, would make him a member of the leadership team.

The four teachers emphasized two things during their development processes. First, they sought any possibility to gain permanent employment status. Permanent status is a sign of outstanding performance and professional growth. ‘I was approved for the transfer to permanent status and will be part of the school teaching team in the fall,’ Teacher 3 said.
happily. ‘Of course, I want to be a permanent staff member, but the principal demands high performance over ten years including the probation period. It is very difficult to get this recognition,’ Teacher 1 sighed. Second, the teachers also explored the criteria for being promoted to a senior rank, which they perceived as recognition of their leadership roles. Teacher 3 mentioned, ‘Promotion in my school is based on whether or not the teacher can work with the leadership team.’ Teacher 4 did not even ‘want to think of any promotion opportunities in the school because this will put more pressure on my work’. Teachers 1 and 2 explained that staff promotion relied on the principal’s discretion, even if a vacancy were available in the school. In contrast, Teacher 3 was confident about promotion because the principal said to him, ‘You need to manage the mathematics panel well and continue your good performance, though there is no guarantee.’ Not long after the interview, Teacher 3 was promoted to the leadership team. In summary, these statements are evidence of the teachers’ perceptions of recognition of their professional growth and leadership roles in relation to permanent employment status and promotion to senior ranks.

Discussion and Conclusion

To answer the research questions, we have highlighted the development of early-career teachers’ leadership as a developmental process of in-school teacher learning. This process may not be interpreted as a linear progression. Of the teachers in this study, only Teacher 3 extended his leadership role beyond his school and gained recognition from his principal, who played a vital role in delegation and facilitation. This delegated teacher learning is the basis for teachers to learn, grow, and lead across the four boundaries of ‘classroom’, ‘subject’, ‘team’, and ‘organization’ (see Figure 1). This also extends the conception held by Muijs et al. (2013) of the school boundary beyond ‘a single school’ (Alexandrou & Swaffield 2012). Thus, we further discuss the allowing, inspirational, and empowering effects of principals’ distributed perspectives on teacher leadership development.

Allowing Effects on Teachers’ In-School Learning

Principals can allow early-career teachers’ learning for professional development through in-school teacher learning. In the initial stage of teacher learning, a good strategy is to assign a mentor for the teacher, as emphasized in Avalos’s (2011) review. Mentoring can establish collegial relationships to help new teachers adapt to a school’s environment. Teacher 4 stated, ‘As our relationship already exists, I can ask my first-year mentor about curriculum matters I do not understand in my second year.’ As Mawhinney (2010) demonstrated, formal learning through mentorship can be turned into informal peer sharing as the relationship continues. For early-career teachers, this is an important formal assignment of teacher learning for familiarization with the profession. As Lieberman and Mace’s (2009) study of ‘accomplished teachers’ showed, a mentor’s performance demonstrates and shares best practices with their fellow teachers in a school as a PLC. Teacher 1 benefited from her mentorship. ‘I still ask [my mentor] if I have any problems with school matters, even after a few years of teaching here.’
Apart from mentorship, principals can provide different opportunities for teachers to participate in learning activities, such as co-planning for subject teams or whole-school lessons. For example, the four teachers in this study had practical opportunities to expand their professional capacity in their first five years of teaching. Teacher 3 experienced a learning process of expanding his capacity across the four boundaries and beyond the school (see Table 4). It is worth noting that not all early-career teachers are offered the same learning opportunities, due to differences in schools. The effects of learning opportunities on teachers’ learning pathways can be contextually specific.

**Inspirational Effects on Teachers’ Professional Growth**

Inspirational effects on professional growth can be achieved through different opportunities for early-career teachers in the middle of their teacher learning processes. This inspires them to explore potential roles across the four boundaries, like the two chemistry teachers studied by Gao and Wang (2014). Although their roles were often assigned by their principals, the four teachers in our study still explored different learning spaces across the classroom, subject, team, and organization boundaries (see Tables 2 and 3). In fact, a principal can play an important role as a leader of teacher learning in a PLC (Massey 2009). Teacher 1 said, ‘As a professional teacher with several years of experience, I need to be open to class observation and share my teaching philosophy and the school’s visions and missions.’ Thus, Teacher 1 could explore different leadership roles as she was exposed to open classroom activities and dialogues with stakeholders. She continued, ‘The principal is proud of the school for what we have done to attract teachers’ and parents’ recommendations of our secondary school.’ Similarly, Teacher 2 was excited to talk about her school’s review exercise: ‘In the coming year, that is, my fifth teaching year here, we will have a comprehensive school review but my colleagues are so nervous.’ To prepare for the review, ‘the principal asked me to teach the new subject plan last year and collect other related evidence for revision,’ she said.

Both Teachers 1 and 2 were exposed to such experiences as fully grown professional teachers. Although they had taught for nearly five years, they were so excited to explore different possibilities for participation. This kind of attitude is related not to a teacher’s years of experience, but to whether they can reflect on and evaluate their experience (Lieberman & Mace 2009). This demonstrates that ‘teacher learning is seen as situated in a particular school-based learning community’ (Gao & Wong 2014: 3). That is why the two teachers treasured these experiences because their principals inspired them to explore.

**Empowering Effect on Teachers’ Aspirations for Recognition of their Leadership Roles**

The four teachers had various opportunities to be assigned to functional leadership roles during their five years of practice (see Table 4). They felt empowered when their principals delegated them as potential leaders (Ingvarson 2009). Teacher 3 remembered:

That was the time I moved to another school which was for special education in my second year of practice after graduation. Then I was assigned to lead the mathematics
panel, while teaching around 30 lessons a week including another five subjects. It was great to concurrently manage the content knowledge of six subjects.

Indeed, his principal wanted to test whether the new teachers he recruited that year (including Teacher 3) could manage a heavy workload alongside their mentorship and monthly thematic support program. ‘The leadership process [of the informal role the teacher performs] is one of facilitating the personal growth of individuals or groups, which in turn brings greater benefit to the leader’ (Harris 2003: 314). This statement can apply to Teacher 3, who passed the performance challenge and helped his principal to lead the mathematics panel in the following year. He received ‘greater benefit’ from the principal’s recognition of his leadership role.

Principals assign teachers functional leadership roles that may or may not cover more than one boundary of teacher leadership, as shown in Table 4. Teacher 2 stayed within the classroom boundary, while Teachers 1 and 4 stretched across the classroom and subject boundaries. Teacher 3 experienced a desirable principal and exceptionally supportive school conditions:

As I was selected for the cross-school project supported by the EDB, I hope I can bring the new ideas I learned from the cross-school learning circle [to my school]. I hope to share the ideas with my colleagues, with the principal’s support for their implementation in the school.

Some teachers will embrace opportunities to perform as potential leaders, regardless of whether the role is functional, informal, or formal in the school hierarchy, as highlighted in Collinson’s (2012) study. Teacher 2 was ‘responsible for the annual planning of physical education for all grades before the school term began’. She was confident in performing this functional leadership role, although she was not the panel head.

We cannot deny that teachers may see their roles as ‘springboards’ for climbing the hierarchical ladder, by seeking any possibility of filling a formal role if principals recognize their leadership (Avalos 2011; Ingvarson 2009). However, many schools are affected by the Chinese culture of seniority and individual principals’ perspectives on promoting young teachers (Hofstede 2001). In fact, unlike Ingvarson’s (2009) findings on the reward scheme for Scottish teachers, it is not necessary for teachers in Hong Kong to be promoted to formal leadership roles if there is no vacancy for promotion. However, if a teacher is not their principal’s ‘chosen one’, it will be difficult for them to gain promotion. Teacher 3’s contribution was recognized by his principal. ‘Promotion in my school is based on seniority, and, luckily, I have been transferred to permanent status [in my third year of teaching]. [I am] one of the school members now,’ he was delighted to say. In this case, he had his principal’s blessing. At the end of the third interview, Teacher 3 shared that ‘the principal told me to keep on handling my work well if I want to take up a new challenge in the next 1 or 2 years, as there will be two vacancies available for promotion’. This shows a developmental process of learning, growing, and leading in principal-delegated teacher learning (Thoonen et al. 2011).
In a school hierarchy, this is not the typical development process of an early-career teacher with a convincing reason for promotion. Rather, this is a process of selecting the right teacher to work with the principal and be recognized as a member of the school leadership team.

This study fills a research gap by unveiling the development of early-career teachers’ leadership in teacher learning in connection with the vital role played by principals in the Chinese education system of Hong Kong. Through its theoretical lens (see Figure 1), this study delineates the development process of learning, growing and leading across the four boundaries through the allowing, inspiring, and empowering effects of principals’ distributed perspectives (Muijs et al. 2013; Szeto & Cheng 2017). This may not be a scenario specific to the Chinese school context. Types of teacher learning activities and principal support can be similar in other school contexts in different places, as shown in systematic reviews (e.g., Avalos 2011; Bouwmans et al. 2017; Poekert 2012). However, teachers in Hong Kong perceive different meanings of permanent employment status and promotion to senior rank than teachers in Western education systems. The findings of this study can enrich the international base of teacher leadership development in teachers’ periodic learning processes. Further research on development of teacher leadership in various contexts is required.

References


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Teacher Leaders’ Influence on Teachers’ Perceptions of the Teacher Evaluation Process

Jill Bradley-Levine, Gina Romano and Michelle Reichart

Abstract: This study examined the ways that teachers’ perceptions of the teacher evaluation process were influenced by the involvement of teacher leaders as evaluators. Data were collected through an online mixed methods survey that measured teachers’ and teacher leaders’ perceptions of leadership practices within their schools, as well as the evaluation process within the context of a USA-based evaluation model. Findings revealed significant differences among teachers’ perceptions of leadership and the evaluation process based on the grade level taught by the teacher and the teacher’s role in evaluation. These results have implications for school leaders and policymakers involved in designing teacher evaluation practices, procedures, and policies. They also contribute to understandings of how teacher leaders may design and carry out their work more effectively when or if they are engaged as teacher evaluators.

Keywords: teacher leaders, teacher evaluation, professional development, teacher support, survey research

Introduction

The study described in this article examined teachers’ perceptions of the teacher evaluation process within a district that implemented a USA-based teacher evaluation model called Teacher Development and Evaluation Model (TDEM, a pseudonym). Within TDEM, teachers are evaluated by school principals and assistant principals, as well as teacher leaders. TDEM incorporates two types of teacher leaders, mentor teachers and master teachers. Both groups of teacher leaders provide instructional support and participate in teacher evaluation. However, mentor teachers remain full-time teachers with classroom teaching responsibilities while master teachers are released from classroom teaching responsibilities in order to support teacher development full time. Evaluators utilise a detailed rubric to assess teacher performance in the context of student learning and continuous teacher development. Teachers learn how to connect their performance to student outcomes during weekly meetings where
they examine student data and explore ‘best practises’ for instruction. Additionally, teachers must agree to adopt the TDEM in order for it to be implemented, per the national organisation; this is designed to improve teacher commitment. The study design was mixed-methods where data were collected through a survey instrument.

**Background**

In 2012, school districts (i.e. local education authorities) across the USA state of Indiana implemented changes to teacher evaluation policy as a response to Public Law (PL) 90. PL 90 tasks school districts to develop a teacher evaluation plan that included a merit pay structure based on at least two teacher observations and student outcomes, as measured by standardised exams (Indiana Code 2012). As part of the new policy, districts could choose to use a rubric developed by the Indiana Department of Education (IDOE) for teacher evaluation. However, the IDOE provided no training on how to implement the rubric. Additionally, the mandate dictated that student growth play a significant role in teacher evaluation; however, it allowed local school authorities to determine what percentage of student growth data would factor into the overall evaluation for each teacher. Finally, the mandate allowed districts to create their own evaluation model or to choose an existing model such as TDEM. At this time, teachers across the Exodus School District (ESD, a pseudonym) voted to adopt and implement the TDEM to meet the state requirement.

TDEM’s key principles include multiple career paths, ongoing applied professional development, instructionally-focused accountability, and performance-based compensation. First, the multiple career path principle allows for teachers to pursue and advance into positions of instructional leadership as mentor or master teachers with the benefit of release time (i.e. time outside of the classrooms and/or an exemption from teaching responsibilities) and a pay increase. Second, the professional development aspect of TDEM offers ongoing opportunities for collaborative growth that are connected to teacher evaluation results and student outcomes. The school schedule is rearranged so that teachers have weekly common meeting time to collaborate for professional development (PD), which is planned and facilitated by mentor and master teachers. PD groups focus on coaching and classroom support to improve individual teachers’ instruction through professional development that is individualised and relevant. Third, instructionally-focused accountability includes multiple planned and unplanned observations conducted by the principal and assistant principal(s), as well as the mentor and master teachers. Scheduled observations consist of pre- and post-observation conferences that permit the teacher to plan a lesson specifically for the observation. Unannounced observations provide principals, assistant principals, and teacher leaders a view of a teacher’s typical lesson; these are followed by a post-observation conference. Observations include a focus on student learning, content knowledge, and instructional strategies guided by the TDEM rubric. Throughout the evaluation process teachers are held accountable to performance indicators as described through the TDEM rubric. Finally, TDEM removes the traditional teacher pay structure and replaces it with
performance-based compensation, which is distributed based on teaching quality as measured by the rubric through classroom observations, as well as student growth and additional responsibilities. It also encourages districts to compensate teachers that are placed in hard-to-staff subjects. Mentor and master teachers are additionally compensated for the responsibilities and time spent supporting, coaching, and evaluating teachers.

In addition, TDEM is supported by rigorous training and professional development for principals, assistant principals and teacher leaders. Each summer, leaders from local schools converge to learn how to: (1) interpret the rubric, (2) conduct pre- and post-observation conferences, (3) coach and support teachers, (4) plan for and carry out professional development sessions, and (5) field test possible instructional strategies to share with teachers. TDEM also provides schools with a coach who typically works with several schools in a region to assure consistent and high-quality implementation of the system.

**Literature Review**

Existing research on teacher evaluation has focused on what evaluators, usually school principals, do and what influences their evaluation practises (Kimball & Milanowski 2009); the relationship between teacher evaluation and student achievement (Milanowski, Kimball & White 2004; Kane, Taylor, Tayler & Wooten 2011); and the structure and purpose of the evaluation process (Berg 2010). However, few researchers have examined the influence of teacher leaders on the evaluation process.

Teacher evaluations consist of making an overall judgement of teachers’ effectiveness through various methods and approaches, often consisting of planned and/or unplanned classroom lesson observations, examination of teacher planning, and value-added measures including data from student standardised exams. Teacher evaluation is one of the most important job responsibilities for a principal (Goldstein & Noguera 2006). The influence that principals have on the outcomes of teacher evaluation is disproportionate when considering several constraints. First, time constraints or demands inherent to the role of the principal may have a negative impact on the principal being able to conduct a thorough and uninterrupted evaluation (Barth 2007; Goldstein & Noguera 2006). Additionally, the principal’s experience in conducting teacher evaluations may influence how well they are able to complete the task of evaluation (Darling-Hammond 2014). Further, principals may or may not receive training that is sufficient in scope, or standardised in approach with other principals within a state, let alone within districts or even buildings (Darling-Hammond 2014). Finally, a prevalent concern of teachers with the principal’s role in conducting teacher evaluations is the content knowledge of the principal conducting the evaluation, which may be limited (Darling-Hammond 2014). These constraints, along with the high stakes of teacher evaluation, have caused teachers to question the reliability and validity of evaluations conducted by principals (Youngs & Grissom 2015).
Despite research that indicates that student achievement is not dependent upon one teacher’s effectiveness alone (Darling-Hammond 2015), policy and research have routinely shown that learner achievement may be related to teacher preparation and teacher effectiveness in instructional delivery of content (Darling-Hammond 2013; Darling-Hammond, Amrein-Beardsley, Haertel & Rothstein 2012; Goldstein & Noguera 2006). These studies have shown that teacher evaluation criteria often do not focus on student learning outside of measures such as standardised exam results (Darling-Hammond 2013; Darling-Hammond et al. 2012; Goldstein & Noguera 2006). Nevertheless, Tucker and Stronge (2005) found a correlation between teacher effectiveness, and student learning and performance.

Teacher evaluation that is followed by appropriate professional development may ensure teacher effectiveness, and could improve student achievement. In response to policy mandates, USA states and school districts have begun to implement professional development initiatives to improve teacher effectiveness while also implementing changes to teacher evaluation models. However, deficiencies identified through evaluations rarely equate to professional development opportunities relevant to the deficiency, which prevents an improvement in the identified needs of the teacher (Darling-Hammond 2014; Howard & Gullickson 2010; Smylie 2014).

USA states and school districts have also sought out various teacher evaluation methods to remain in compliance with policy and/or to receive waivers from policy requirements in order to continue to receive federal funds (Darling-Hammond 2013; Marzano, 2012). Teacher evaluation serves two distinct purposes, measurement and growth (Goe, Biggers & Croft 2012; Marzano 2012). Researchers have found that evaluations fall into three categories, summative, formative, and emergent (Boyland, Harvey, Quick & Choi 2014; Danielson 2011). Summative evaluations are designed to evaluate teachers based on the criteria for human capital decisions such as tenure, assignment, and continued employment. Formative evaluations are conducted to assist the teacher in growth and development towards the criterion-based outcomes. Criteria utilised by USA state and school district norm-referenced evaluation models include student achievement, content knowledge, in- and out-of-classroom instructional strategies, and behavioural management strategies. Despite the distinct difference in the two forms of evaluations, researchers have found that most principals attempt to conduct both types at the same time, which has created distrust of the process by teachers and principals alike (Goe et al. 2012).

However, emergent evaluations include individuals other than the teacher and the principal in the evaluation process. Value-added measures such as merit-pay are also often included in emergent methods (Boyland et al. 2014). TDEM is an emergent teacher evaluation approach because it includes teacher leaders in the evaluation process and relies on value-added measures. Research has found mixed results regarding teachers’ perceptions of teacher leaders engaged in the evaluation process (Kiran 2013). In a study of teacher leaders in seven Maine schools, Fairman and Mackenzie (2012) found that the title of ‘teacher leader’ had negative connotations and caused the teacher leaders to experience the social and political
culture of the school differently than teachers without such a title. However, the title caused
the teacher leaders to focus more on improvement of the school and of the profession
compared to other teachers (Fairman & Mackenzie 2012). Kiranh (2013) found that teachers
had a higher expectation of teacher leaders than they did of principals; yet their perception of
feedback given to them by teacher leaders was lower than their perception of feedback they
received from principals.

Researchers have concluded that teacher leaders have an appreciation for the improvement
needed within their respective schools, and focus not just on bettering their own instruction,
but also in improving the school as a whole (Fairman & Mackenzie 2012; Struyve, Meredith
& Gielen 2014). Thus, the presence of teacher leaders in the evaluation process is constructive
for school improvement measures. Though research indicates that teachers do not perceive
the input of the teacher leader in the same manner as they do principals, the overall perception
that teacher leaders and principals share regarding the importance of improving instruction
makes the use of teacher leaders conducive to a climate of growth and change (Fairman &

Methodology

This study followed a concurrent mixed methods survey design (Creswell 2012), which
included the collection and analysis of qualitative and quantitative data to explore how the
involvement of teacher leaders in teacher evaluation influences teachers’ perceptions of the
teacher evaluation process.

Site

The site for this study was Exodus School District (i.e. local education authority) where
teachers had voted to implement TDEM in every school within the district. The district
includes seven elementary schools, one middle school, and one high school. Implementing
the TDEM across a school district is not always the pattern since the model has been
implemented by individual schools within one district in other areas of the USA. Focusing the
study on a district-wide implementation allowed for the exploration of implementation across
all educational levels including primary to secondary schools where all schools had similar
district-level supports. The district selected as the case is also considered a ‘high need’ district
by the state department of education because a high percentage of students are considered
low income, there is a large number of students of colour, and students have consistently
performed below average on the state-mandated exams. Thus, the district provides a context
whereby improved teacher effectiveness could have a positive impact on student outcomes.

Methods

We invited all 508 teachers and teacher leaders in the district to complete an online survey.
The instrument was a combination of existing items borrowed from the Teacher Leadership
Inventory (TLI) (Angelle & Dehart 2016) and items developed with input from district principals and the TDEM state director. The TLI measured teachers’ perceptions of teacher leadership in their school, while the other items probed teachers’ perceptions of the teacher evaluation process.

Three sets of scaled items from Angelle and Dehart’s (2016) Teacher Leadership Inventory were used. The three sets of items measure these concepts: Sharing Expertise, Sharing Leadership, and Supra-Practitioner. Responses to individual items for each set were combined and averaged to form scales. The entire instrument had a Cronbach alpha of 0.95, which is quite high for the 32 total items included in the instrument; this indicates that this instrument has good psychometric properties. The items included in each scale are listed in Table 3.

The scores for the Sharing Expertise Scale were found to be highly reliable (Cronbach’s alpha=0.76) and somewhat lower than Angelle and Dehart (2016), who found a 0.84 alpha reliability. For the Sharing Leadership Scale, scores were found to be reliable as well (Cronbach’s alpha=0.88), and similar to Angelle and Dehart (2016), who found an alpha of 0.84. The three items in the Supra-Practitioner Scale were also found to be reliable (Cronbach’s alpha=0.80), but somewhat lower than Angelle and Dehart (2016), who reported an alpha of 0.85. For development of an additional scale called Overall Teacher Leadership, scores from all three scales (14 items) were combined and averaged. Scores from the Overall Teacher Leadership Scale were found to be reliable (Cronbach’s alpha=0.88).

In addition, a new scale called the Teacher Evaluation Scale was created; it included 18 items about teacher evaluation, which are listed in Table 4.1 The respondents scored their answers on a scale from 1 to 5 for all quantitative survey items, with 1 signifying they strongly disagree and 5 indicating they strongly agree.

Four open response questions were also included on the survey in order to collect qualitative data. These questions asked respondents to reflect on their experiences working with teacher leaders, identify strengths of the evaluation process, and suggest changes to the process. The final question probed respondents’ perceptions concerning how including teacher leaders as evaluators has influenced the overall teacher evaluation process.

**Sample**

Of the 508 teachers and teacher leaders who were sent the survey link, 181 opened the survey. Of these, 164 responded to at least one question. Of the 164 teachers who answered at least one question on the survey, 148 answered at least one question besides the demographic and teacher profile questions. Thus, the final sample size is 148 to ensure that we could analyse

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1 Although 18 items might be considered too many, this is the first time we are testing these items and because we did not use a theoretical basis for separating the items into sub-scales, we include them all in one scale for this study.
responses to questions about teacher leadership. A total of 53 teachers and teacher leaders responded to the qualitative, open-ended items. Table 1 shows the respondent profile for the survey.

**Table 1: Educator profile (N=148)**

<table>
<thead>
<tr>
<th></th>
<th>Number of Participants</th>
<th>Percent of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grade Level Mostly Taught</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elementary School</td>
<td>78</td>
<td>52.7</td>
</tr>
<tr>
<td>Middle School</td>
<td>24</td>
<td>16.2</td>
</tr>
<tr>
<td>High School</td>
<td>46</td>
<td>31.1</td>
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<td><strong>Years of Overall Teaching Experience at Start of 2016-17 School Year</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-11</td>
<td>53</td>
<td>35.8</td>
</tr>
<tr>
<td>12 -19</td>
<td>47</td>
<td>31.8</td>
</tr>
<tr>
<td>20+</td>
<td>48</td>
<td>32.4</td>
</tr>
<tr>
<td><strong>Years Teaching in Current School District</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-11</td>
<td>77</td>
<td>52.0</td>
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<tr>
<td>12 -19</td>
<td>43</td>
<td>29.1</td>
</tr>
<tr>
<td>20+</td>
<td>28</td>
<td>18.9</td>
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<tr>
<td><strong>Role</strong></td>
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<td>Classroom teacher</td>
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<td>76.4</td>
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<td>Mentor teacher</td>
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<td>15.5</td>
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<tr>
<td>Master teacher</td>
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<td>6.8</td>
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<tr>
<td>Other</td>
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<td>1.4</td>
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<tr>
<td><strong>Gender</strong></td>
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<tr>
<td>Male</td>
<td>37</td>
<td>25.0</td>
</tr>
<tr>
<td>Female</td>
<td>101</td>
<td>68.2</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>9</td>
<td>6.1</td>
</tr>
<tr>
<td>Missing</td>
<td>1</td>
<td>0.7</td>
</tr>
</tbody>
</table>
Quantitative Analysis

The five main variables tested in this study are: Sharing Expertise Scale, Sharing Leadership Scale, Supra-Practitioner Scale, Overall Teacher Leadership Scale, and Teacher Evaluation Scale. Table 2 presents the descriptive results for these variables.

Table 2: Descriptive results for dependent variables (N=148)

<table>
<thead>
<tr>
<th>Variable</th>
<th>Mean</th>
<th>Standard Deviation</th>
<th>Minimum Score on Scale</th>
<th>Maximum Score on Scale</th>
<th>Cronbach’s alpha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharing Expertise Scale</td>
<td>4.11</td>
<td>0.58</td>
<td>1.00</td>
<td>5.00</td>
<td>0.76</td>
</tr>
<tr>
<td>Sharing Leadership Scale</td>
<td>3.41</td>
<td>0.85</td>
<td>1.00</td>
<td>5.00</td>
<td>0.88</td>
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<tr>
<td>Supra-Practitioner Scale</td>
<td>3.63</td>
<td>0.77</td>
<td>1.00</td>
<td>5.00</td>
<td>0.80</td>
</tr>
<tr>
<td>Overall Teacher Leadership Scale</td>
<td>3.71</td>
<td>0.59</td>
<td>1.00</td>
<td>5.00</td>
<td>0.88</td>
</tr>
<tr>
<td>Teacher Evaluation Scale</td>
<td>3.76</td>
<td>0.65</td>
<td>1.00</td>
<td>5.00</td>
<td>0.93</td>
</tr>
</tbody>
</table>

SPSS Statistics, version 24 was utilised for the data analysis. For testing specific group differences in the Sharing Expertise Scale, Sharing Leadership Scale, Supra-Practitioner Scale, and Overall Teacher Leadership Scale between two groups, independent t-tests were utilised. For analysing differences among three or more groups, one-way ANOVA tests were computed, with post-hoc analyses performed using Tukey’s HSD (Honestly Significant Difference) to identify specific differences between groups. To better substantiate the results of the t-tests and ANOVA tests, effect sizes (Cohen’s d) were calculated, which measure the size of the difference between means, divided by the pooled standard deviation. The National Center for Education Statistics’ guidelines on effects sizes and statistical significance were utilised (see Seastrom 2002). Only statistically significant results that are practically relevant are reported, since statistical significance can be found among variables, but provide no important and applicable evidence toward the research questions. Ordinary least squares regression was used for finding significant associations between the various teacher characteristics and outcome variables.

Qualitative Analysis

Qualitative data analysis followed an interpretive approach (Hatch 2002). First, we read all of the open response data. As we read, we recorded our impressions about the possible meanings of the data in memos. We reviewed our memos and created a list of possible codes
to represent the possible meanings. Next, we sorted the data by school level (i.e. elementary, middle, or high) and by role (i.e. classroom teacher, mentor teacher, or master teacher). Then we reread the data for each group (i.e. elementary school teachers, middle school teachers, high school teachers, elementary school teacher leaders, middle school teacher leaders, and high school teacher leaders), applying codes as we read. After coding all of the data, wrote summaries for each group. Finally, we compared the summaries in order to identify similarities and differences. Validity checks included member checking and peer review (Creswell 2012; Hill et al. 2005).

Findings
The findings are organised in two sections. The first shares the descriptive results. The second section shares the inferential results. Qualitative findings from the survey are shared in both sections to illuminate the quantitative results.

Descriptive Results

Teacher Leadership Factors
Teachers’ responses to the teacher leadership items indicated overall perceptions from neutral or agree, as shown in Table 3. Teachers agreed with items about how teachers collaborate and support each other (i.e. Sharing Expertise), whereas their perceptions of sharing leadership and doing more than is expected (i.e. Supra-Practitioner) reflected impartial or neutral views.

Table 3: Responses to teacher leadership items (N=148)

<table>
<thead>
<tr>
<th>Mean (Standard Deviation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharing Expertise Scale</td>
</tr>
<tr>
<td>Teachers ask one another for assistance when we have a problem with student behaviour in the classroom. (n=147)</td>
</tr>
<tr>
<td>Other teachers willingly offer me assistance if I have questions about how to teach a new topic or skills. (n=147)</td>
</tr>
<tr>
<td>Teachers share new ideas for teaching with other teachers such as through grade/department meetings, school-wide meetings, professional development, etc. (n=147)</td>
</tr>
<tr>
<td>Teachers discuss ways to improve student learning. (n=147)</td>
</tr>
<tr>
<td>Teachers stay current on education research in our grade level/subject area/department. (n=148)</td>
</tr>
</tbody>
</table>
### Sharing Leadership Scale

<table>
<thead>
<tr>
<th>Item</th>
<th>Mean (SD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teachers are involved in making decisions about activities such as professional development, cross-curricular projects, etc. (n=146)</td>
<td>3.10 (1.15)</td>
</tr>
<tr>
<td>Teachers are actively involved in improving the school as a whole. (n=148)</td>
<td>4.06 (0.82)</td>
</tr>
<tr>
<td>The principal responds to the concerns and ideas of teachers. (n=147)</td>
<td>3.68 (1.06)</td>
</tr>
<tr>
<td>Teachers plan the content of professional learning activities at my school. (n=147)</td>
<td>3.05 (1.20)</td>
</tr>
<tr>
<td>Teachers have opportunities to influence important decisions even if they do not hold an official leadership position. (n=147)</td>
<td>3.11 (1.08)</td>
</tr>
<tr>
<td>Time is provided for teachers to collaborate about matters relevant to teaching and learning. (n=147)</td>
<td>3.43 (1.15)</td>
</tr>
</tbody>
</table>

### Supra-Practitioner Scale

<table>
<thead>
<tr>
<th>Item</th>
<th>Mean (SD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teachers willingly stay after school to work on school improvement activities. (n=148)</td>
<td>3.49 (0.99)</td>
</tr>
<tr>
<td>Teachers willingly stay after school to help other teachers who need assistance. (n=146)</td>
<td>3.93 (0.82)</td>
</tr>
<tr>
<td>Teachers willingly stay after school to work with the principal, if the principal needs assistance. (n=147)</td>
<td>3.45 (0.92)</td>
</tr>
</tbody>
</table>

Answers to the open response items provide some context to these findings. The means for the Sharing Expertise items are the highest among the three scales, demonstrating that teachers and teacher leaders alike perceive that the TDEM supports teacher collaboration. However, the slightly lower means for the Sharing Leadership and Supra-Practitioner items indicate that some teachers feel disempowered and/or discouraged. One elementary teacher explained that ‘it has damaged colleague relationships and promoted competition and a sense of inadequacy’. A high school teacher agreed: ‘It has created competition between peers.’ A middle school teacher reported that ‘it has brought down morale in our building’. Another elementary teacher described that ‘some teachers have decided to create cliques to isolate [teacher leaders]’. Teacher leaders agreed that some elements of the TDEM have a negative impact on teachers. For instance, they described that some teachers become discouraged by their observation scores: ‘[Teachers] are really hard on themselves if they only get 3s, except that is proficient, and I wish they realised how good that is.’ Another teacher leader said, ‘Scores sometimes get in the way of the understanding of strengths, and areas of improvement within the lesson.’ In addition, teacher leaders reported that the compensation system may motivate teachers to compete with each other rather than to collaborate: ‘We are all in this together. Why make it a pot to be divvied up? That makes teachers less likely to help others.’
To address these issues, several teachers suggested that teachers need to feel more in control of the evaluation process. For example, they would like input into how many times they are observed and the length of the window of time that unannounced observations may take place. Further, high school teachers in particular judged that teachers who perform well consistently do not need to be observed as often as those who need support to refine their practice. Several teacher leaders agreed that changes to the observation structure would be an improvement. Some teachers also felt that the feedback they receive sometimes conflicts, and they would like to see more consistency across evaluators. However, many teacher leaders shared that they believe the TDEM to be more consistent and fair that previous evaluation processes. In fact, school leadership teams, which consist of principals, assistant principals, and mentor and master teachers work hard to be consistent: ‘[The leadership team] members are always working at interrater reliability.’ Another teacher leader noted that ‘our [team] is aligned’.

_Evaluation Process Items_

For the survey items that measured the evaluation process, teachers reported neutral perceptions except when asked about the rubric and areas measured by the rubric, as shown in Table 4. Teachers agreed with the rubric items, shaded in grey.

**Table 4: Responses to teacher evaluation items (N=148)**

<table>
<thead>
<tr>
<th>Item</th>
<th>Mean (Standard Deviation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>My experience with teacher evaluation in my current district during the last 5 years has been mostly positive. (n=143)</td>
<td>3.31 (1.19)</td>
</tr>
<tr>
<td>I have felt supported by master and/or mentor teachers at my school during the evaluation process. (n=143)</td>
<td>3.81 (1.07)</td>
</tr>
<tr>
<td>I have felt supported by the principal at my school during the evaluation process. (n=142)</td>
<td>3.61 (1.13)</td>
</tr>
<tr>
<td>I have received feedback through the evaluation process that has been useful to improving my practise. (n=143)</td>
<td>3.75 (1.11)</td>
</tr>
<tr>
<td>The feedback I have received from master and/or mentor teachers at my school has been more useful than the feedback I have received from the principal at my school. (n=143)</td>
<td>3.23 (1.00)</td>
</tr>
<tr>
<td>At my school, principal evaluation ratings have been similar to master/mentor teacher evaluation ratings of my practise. (n=142)</td>
<td>3.65 (0.97)</td>
</tr>
<tr>
<td>I am observed the right number of times per semester. (n=143)</td>
<td>3.97 (0.86)</td>
</tr>
<tr>
<td>I understand the rubric used to evaluate my instructional practise. (n=143)</td>
<td>4.31 (0.76)</td>
</tr>
<tr>
<td>Statement</td>
<td>Mean (SD)</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>I understand what is expected of me when it comes to designing and planning instruction for my students.  (n=143)</td>
<td>4.22 (0.78)</td>
</tr>
<tr>
<td>I understand what is expected of me when it comes to instruction of my students.  (n=143)</td>
<td>4.27 (0.72)</td>
</tr>
<tr>
<td>I understand what is expected of me when it comes to the learning environment of my classroom.  (n=143)</td>
<td>4.28 (0.71)</td>
</tr>
<tr>
<td>I understand what is expected of me when it comes to my professional responsibilities.  (n=143)</td>
<td>4.23 (0.73)</td>
</tr>
<tr>
<td>Professional development at my school has aligned with teacher evaluation expectations.  (n=143)</td>
<td>3.81 (0.93)</td>
</tr>
<tr>
<td>Instructional techniques I am supposed to use are supported by research.  (n=143)</td>
<td>3.94 (0.86)</td>
</tr>
<tr>
<td>I am confident using instructional techniques recommended by master and/or mentor teachers at my school.  (n=143)</td>
<td>3.65 (1.04)</td>
</tr>
<tr>
<td>I have adequate training to feel confident trying new instructional techniques.  (n=143)</td>
<td>3.76 (0.86)</td>
</tr>
<tr>
<td>It is acceptable for teachers to fail and try again at my school.  (n=143)</td>
<td>3.60 (1.13)</td>
</tr>
<tr>
<td>If I am not already a mentor or master teacher, I would consider applying to be a master or mentor teacher at my school in the future.  (n=140)</td>
<td>2.32 (1.28)</td>
</tr>
</tbody>
</table>

As with the teacher leadership scales, the open response data from the survey may contribute to understandings of these results. The items with the highest means are all related to respondents’ understanding of expectations as defined through the rubric. Open response data aligned with these results as teachers overwhelmingly appreciated the use of a detailed rubric for evaluation. They described the rubric as a tool that clearly defined for them effective teaching strategies. An elementary teacher shared that ‘the rubric has helped me in making better lesson plans’. Likewise, a middle school teacher noted that the rubric focuses on ‘best practises that are research based’. Many teachers reported that evaluators use the rubric as a guide to identify ‘areas for refinement and reinforcement’. In the TDEM, refinement areas are where growth is needed while reinforcements are areas of strength. A teacher leader explained: ‘The rubric allows for open dialogue between an evaluator and a teacher.’ Indeed, evaluators including teacher leaders and administrations use the rubric to provide detailed feedback. A high school teacher said, ‘We get good feedback on our lessons.’ An elementary teacher described receiving ‘new ideas to try’. In addition, elementary teachers said that the focus on improvement was motivating: ‘There is increased focus on improving teaching, not punitive measures meant to discipline teachers.’ Finally, the fact that multiple teacher leaders, the principal and assistant principal(s) observe teachers was also viewed positively by many
An elementary teacher noted that evaluation now ‘gives teachers more than just one person’s feedback’. A middle school teacher appreciated that teacher leaders are ‘not too far removed from the classroom’ and so their feedback is more reliable.

**Inferential Results**

**Grade Level Taught**

Respondents who expressed the highest levels of agreement with the teacher leadership and evaluation scales were generally elementary school teachers. A statistically significant difference was found in group means for the Supra-Practitioner Scale (F=4.75, p <0.01) between elementary and middle school teachers. In other words, elementary teachers reported stronger agreement than middle school teachers, as shown in Table 5. Furthermore, a large effect size was found between elementary and middle school teachers (Cohen’s $d=1.38$).

**Table 5: Teacher leadership and evaluation scale scores by grade level taught**

<table>
<thead>
<tr>
<th>Scale</th>
<th>Elementary Mean (SD)</th>
<th>Middle Mean (SD)</th>
<th>High Mean (SD)</th>
<th>F</th>
<th>Df</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharing Expertise Scale</td>
<td>78 4.12 (0.56)</td>
<td>24 4.05 (0.88)</td>
<td>46 4.14 (0.41)</td>
<td>0.19</td>
<td>2</td>
</tr>
<tr>
<td>Sharing Leadership Scale</td>
<td>78 3.45 (0.82)</td>
<td>24 3.17 (1.02)</td>
<td>46 3.47 (0.83)</td>
<td>1.14</td>
<td>2</td>
</tr>
<tr>
<td>Supra-Practitioner Scale</td>
<td>78 3.80 (0.68)</td>
<td>24 3.33 (1.03)</td>
<td>46 3.49 (0.71)</td>
<td>4.75*</td>
<td>2</td>
</tr>
<tr>
<td>Overall Teacher Leadership Scale</td>
<td>78 3.76 (0.55)</td>
<td>24 3.51 (0.82)</td>
<td>46 3.71 (0.52)</td>
<td>1.53</td>
<td>2</td>
</tr>
<tr>
<td>Evaluation Scale</td>
<td>74 3.73 (0.65)</td>
<td>24 3.60 (0.73)</td>
<td>45 3.91 (0.58)</td>
<td>1.96</td>
<td>2</td>
</tr>
</tbody>
</table>

Note: SD=standard deviation; F= F statistic for ANOVA tests; df=degrees of freedom

* = p≤ .05, two-tailed

Findings from the open response items may help to explain these findings. Although six middle school teachers described their experiences working with teacher leaders as supportive and/or helpful, about three times as many high school teachers (n=15) and five times as many elementary teachers (n=25) reported positive (e.g. helpful, supportive, good) interactions with teacher leaders when asked to describe their interactions with teacher leaders. In addition, about 60 per cent of elementary teachers identified strengths of the
evaluation process while only 54 per cent of both middle and high school teachers reported that there were strengths of the TDEM. Nevertheless, when asked what they would change about the TDEM, teachers at all levels made many suggestions including that the system could be more flexible, particularly regarding individual teacher needs, teaching level, and content area, that feedback needs to be more consistent across evaluators, and that teachers need more input into the design of the process (e.g. number and frequency of announced and unannounced observations). Of interest, teacher leaders at the elementary and high school levels also responded more positively to the open response items than did middle school teacher leaders.

**Role**

Respondents who expressed the highest levels of agreement with the teacher leadership and evaluation scales were those who had teacher leadership roles including mentor and master teachers. A statistically significant difference was found in group means for the Sharing Leadership Scale (F=9.60, p=0.00), the Overall Teacher Leadership Scale (F=4.23, p=0.02), and the Evaluation Scale (F=19.85, p=0.00), as shown in Table 6. More specifically, the significant differences occurred between career teachers and mentor teachers, as well as between career teachers and master teachers for the Sharing Leadership Scale, where mentor and master teachers reported stronger agreement than career teachers. Large effect sizes\(^2\) were found between career teachers and mentor teachers (Cohen’s d=0.90), and between career teachers and master teachers (Cohen’s d=0.90). In addition, mentor teachers reported stronger agreement than career teachers for the Overall Teacher Leadership Scale. A large effect size was found between career teachers and mentor teachers (Cohen’s d=0.90). Lastly, for the Evaluation Scale, mentor and master teachers reported significantly stronger agreement than career teachers. Large effect sizes were found between career teachers and mentor teachers (Cohen’s d=1.19), and between career teachers and master teachers (Cohen’s d=1.60).

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\(^2\) Guideline 5-1-4F of the NCES Handbook on Statistical Standards deems Cohen d effect sizes of .2 as small, .5 as medium and .8 large. For correlations (r), .1 is small, .3 is medium and .5 is large (Seastrom 2002).
Table 6: Teacher leadership and evaluation scale scores by role

<table>
<thead>
<tr>
<th></th>
<th>Classroom Teacher</th>
<th>Mentor Teacher</th>
<th>Master Teacher</th>
<th>F</th>
<th>df</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>Mean (SD)</td>
<td>N</td>
<td>Mean (SD)</td>
<td>n</td>
</tr>
<tr>
<td>Sharing Expertise Scale</td>
<td>113</td>
<td>4.07 (0.60)</td>
<td>23</td>
<td>4.30 (0.47)</td>
<td>10</td>
</tr>
<tr>
<td>Sharing Leadership Scale</td>
<td>113</td>
<td>3.25 (0.85)</td>
<td>23</td>
<td>3.79 (0.72)</td>
<td>10</td>
</tr>
<tr>
<td>Supra-Practitioner Scale</td>
<td>113</td>
<td>3.65 (0.73)</td>
<td>23</td>
<td>3.72 (0.83)</td>
<td>10</td>
</tr>
<tr>
<td>Overall Teacher Leadership Scale</td>
<td>113</td>
<td>3.63 (0.60)</td>
<td>23</td>
<td>3.96 (0.54)</td>
<td>10</td>
</tr>
<tr>
<td>Evaluation Scale</td>
<td>108</td>
<td>3.59 (0.60)</td>
<td>23</td>
<td>4.24 (0.49)</td>
<td>10</td>
</tr>
</tbody>
</table>

Note: SD=standard deviation, F= F statistic for ANOVA tests; df=degrees of freedom
*=p<.05, two-tailed

Further analysis showed that role was the most critical indicator in understanding differences among groups for the Teacher Leadership and Evaluation scales. First, ordinary least squares regression results showed a statistically significant positive linear relationship between role and the Sharing Leadership Scale, \( t=4.09, p=0.00 \). Moreover, teacher role exerted the strongest influence on this scale when controlling for the other variables listed \( \beta=0.34 \), revealing that being a teacher leader led to more positive perceptions of sharing leadership, as shown in Table 7.

Table 7: Multiple regression analysis for variables predicting the sharing leadership scale (N=148)

<table>
<thead>
<tr>
<th></th>
<th>B</th>
<th>SE</th>
<th>( \beta )</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>-0.06</td>
<td>0.17</td>
<td>-0.03</td>
</tr>
<tr>
<td>Grade level taught</td>
<td>-0.04</td>
<td>0.08</td>
<td>-0.04</td>
</tr>
<tr>
<td>Years of overall teaching experience</td>
<td>-0.02</td>
<td>0.03</td>
<td>-0.05</td>
</tr>
<tr>
<td>Role</td>
<td>0.50</td>
<td>0.12</td>
<td>0.34*</td>
</tr>
</tbody>
</table>

Note. R=0.11 R\(^2\) (adj)= 0.09; B=slope, \( \beta \) is the standardised beta. The variable ‘years teaching in the district’ was not included in the model due to multicollinearity.
* \( p<.05 \)
Second, findings from the regression analysis showed a statistically significant positive linear relationship between role and the Overall Teacher Leadership Scale, \((t=2.72, \ p=0.01)\), with teacher role exerting the strongest influence on this scale when controlling for the other variables listed \((\beta=0.23)\). In other words, being a teacher leader led to more positive perceptions of overall teacher leadership, as shown in Table 8.

**Table 8:** Multiple regression analysis for variables predicting the overall teacher leadership scale \((N=148)\)

<table>
<thead>
<tr>
<th></th>
<th>B</th>
<th>SE</th>
<th>(\beta)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>-0.06</td>
<td>0.12</td>
<td>-0.04</td>
</tr>
<tr>
<td>Grade level taught</td>
<td>-0.05</td>
<td>0.06</td>
<td>-0.07</td>
</tr>
<tr>
<td>Years of overall teaching experience</td>
<td>-0.02</td>
<td>0.02</td>
<td>-0.08</td>
</tr>
<tr>
<td>Role</td>
<td>0.24</td>
<td>0.09</td>
<td>0.23*</td>
</tr>
</tbody>
</table>

Note. \(R=0.25 \ R^2(\text{adj})=0.06; \ B=\text{slope}, \ \beta \text{ is the standardised beta. The variable ‘years teaching in the district’ was not included in the model due to multicollinearity. The variable of content area was also not included to keep a parsimonious model.}\)

* \(p<.05\)

Finally, ordinary least squares regression results showed a statistically significant positive linear relationship between role and the Evaluation Scale, \((t=5.78, \ p=0.01)\). Further, teacher role exerted the strongest influence on this scale when controlling for the other variables listed \((\beta=0.45)\), which showed that being a teacher leader led to more positive perceptions of the evaluation process, as shown in Table 9.

**Table 9:** Multiple regression analysis for variables predicting the evaluation scale \((N=148)\)

<table>
<thead>
<tr>
<th></th>
<th>B</th>
<th>SE</th>
<th>(\beta)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>0.14</td>
<td>0.12</td>
<td>0.10</td>
</tr>
<tr>
<td>Grade level taught</td>
<td>0.06</td>
<td>0.06</td>
<td>0.09</td>
</tr>
<tr>
<td>Years of overall teaching experience</td>
<td>-0.03</td>
<td>0.02</td>
<td>-0.09</td>
</tr>
<tr>
<td>Role</td>
<td>0.49</td>
<td>0.09</td>
<td>0.45*</td>
</tr>
</tbody>
</table>

Note. \(R=0.48 \ R^2(\text{adj})=0.23; \ B=\text{slope}, \ \beta \text{ is the standardised beta. The variable ‘years teaching in the district’ was not included in the model due to multicollinearity. The variable of content area was also not included to keep a parsimonious model.}\)

* \(p<.05\)
Once again, open response data may contribute to a better understanding of these findings. The inferential results demonstrated that teachers differ in their perceptions of teacher leaders in the context of the TDEM. Many teachers described teacher leaders as helpful and their experiences working with them as positive. However, mentor teachers were valued more than master teachers because teachers viewed them as more supportive and because they still have teaching responsibilities. In addition, some teachers appreciated the opportunities to be coached by teacher leaders but were not as positive about being evaluated by them. According to an elementary teacher, ‘[Teacher leaders] really don’t know more than we do.’ On the other hand, about the same number of teachers acknowledged that being evaluated by peers was preferable to being evaluated only by principals. One middle school teacher shared that observations are done by evaluators who are ‘not too far removed from the classroom’ so they know better what teachers are experiencing. An elementary teacher agreed: ‘Teachers feel more invested when we know our colleagues and peers are involved as evaluators.’ A high school teacher also recognised that ‘our master [and] mentor teachers all TEACH, which makes them understanding of the job of a teacher’. Teacher leaders shared this perception: ‘Teachers feel comfortable having another teacher evaluate them and not someone out of the classroom.’ Another teacher leader said, ‘Getting feedback from peers has a coaching rather than evaluative feel.’

Nevertheless, it is clear that the leadership style and personality of teacher leaders influenced teachers’ perceptions of the evaluation process. An elementary teacher explained that ‘it depends on the specific [teacher leader]’. Another noted that ‘some peers are less trusted or more awkward to work with’. A middle school teacher described some teacher leaders who ‘run to the principal to share what they perceive as negative’ while other teacher leaders focus on trying to help. Furthermore, some teachers reported that having teacher leaders involved in evaluation feels unequal or unfair. An elementary teacher described that teacher leaders ‘seem to have a false sense of power’ and that she ‘feels talked down to’ by the teacher leaders at her school. At the secondary level, teachers were concerned that teacher leaders are paid more but seem to work less. According to a high school teacher, teacher leaders ‘have a lighter teaching load PLUS a significant stipend’. High turnover rates of mentor and master teachers could contribute to this impression as several teachers reported that certain groups of teacher leaders with whom they had worked in past years were ‘great’, but that current groups were ‘not helpful’, and vice versa. As one teacher put it, ‘I have learned that only the right PEOPLE make the [evaluation] process effective.’ For their part, a few teacher leaders recognised these issues: ‘It sometimes works, as we are all a part of the staff, but sometimes there is an “us” and “them” mentality.’

**Discussion and Conclusion**

Findings from this study contribute to what is known about the ways that engaging teacher leaders in the teacher evaluation process can influence the meaning and purpose of evaluation for teachers. Features of the TDEM including the rubric and ongoing, collaborative
professional development provided transparency and structure to the evaluation process. The rubric clarified performance expectations for teachers, and facilitated feedback given by teacher leaders to teachers. In addition, weekly PD sessions provided teachers with time to collaborate and learn new teaching strategies directly connected to ‘best practises’ as described on the rubric. These features may have contributed to the slightly higher mean for the Sharing Expertise items. Moreover, the precision of the rubric and the way that it is used by teacher leaders could be the reason why the highest means on the Teacher Evaluation Scale were for items that asked about teachers’ knowledge of the rubric. Further, teacher leaders used the rubric to identify and communicate to teachers both reinforcement (i.e. teaching strengths) and refinement (i.e. areas of needed improvement), and then addressed refinement needs in the context of weekly PD meetings. This contradicts the finding from earlier studies that teaching deficiencies identified through evaluation are rarely addressed through follow-up professional development (Darling-Hammond 2014; Howard & Gullickson 2010; Smylie 2014). Within the TDEM, this is simply not the case. The rubric helps teacher leaders identify refinements, and these needs are addressed through professional development delivered at the weekly PD sessions.

The role of teacher leaders as both evaluators and instructional coaches within the TDEM was not without problems. Although teachers appreciated the opportunity to be evaluated by colleagues rather than only principals, cultivating positive and trusting relationships was still a challenge. This aligns with the existing research that found teacher leaders were sometimes ostracised by their peers (Fairman & Mackenzie 2012). Nevertheless, the teacher leaders demonstrated that they do, indeed, focus heavily on improvement at both the teacher and student level, which aligns with past studies (Fairman & Mackenzie 2012; Struyve et al. 2014). However, the features of the TDEM mentioned above cultivate a school-wide focus on continual improvement that many teachers in this study shared through the open response items. Ultimately, teacher leaders must work even harder to develop positive relationships and build trust with teachers if and when they are engaged in evaluation. But a culture of shared leadership must also extend beyond teacher leaders to teachers themselves. The teachers in this study provided extensive suggestions for improving the TDEM, and they need concrete ways to exert their own influence on the evaluation process.

These findings have applications for states and schools in the process of designing and implementing more rigorous teacher evaluation programmes. Further, in the context of teacher evaluation policy, this study provides an example of how such policies can be implemented to empower teachers to improve their teaching and take responsibility for achieving equitable educational outcomes for all of their students. Further study should be conducted across districts that have designed and/or implemented similar evaluation models to determine how the TDEM and/or the school district context influence outcomes.
References


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Organizational Influences of Collective Efficacy and Trust on Teacher Leadership

Lee D. Flood and Pamela S. Angelle

Abstract: This USA quantitative study explored the relationships of the organizational variables of trust, collective efficacy, teacher leadership and teacher demographic variables. Teachers (n = 443) across 25 schools responded to three surveys, the Teacher Leadership Inventory, the Teacher Efficacy Belief Scale–Collective Form and the Omnibus-T Scale. Schools that had high levels of collective efficacy and trust fostered the necessary conditions and cultures to realize high levels of teacher leadership and benefit from the resultant favorable outcomes from an environment rich in teacher leadership. Recommendations for further study include using quantitative methodologies that account for the multilevel structure of schools and qualitative examinations of principals who have been successful in creating environments conducive of high-levels of teacher leadership in a variety of contexts.

Keywords: teacher leadership, collective efficacy, trust in schools, quantitative research

Introduction

Literature generally reflects that teacher leadership is a necessary component of school improvement (Berry & Farris-Berg 2016; Cosenza 2015; Fairman & MacKenzie 2015; Feiler, Heritage & Gallimore 2000; Katzenmeyer & Moller 2001; Moller, Childs-Bowen & Scrivner 2001; Wynne 2001;). However, despite years of research, studies rarely investigate beyond documentation of the roles, skills and responsibilities of teacher leaders. Moreover, the majority of studies have examined teacher leadership at the teacher level of analysis, drawing conclusions that speak to those teachers who take on leadership roles. The literature rarely touches upon the perspective of organizational benefits which, if found to be pervasive in schools, might offer wide support for teacher leadership. Constructs which have been found to increase organizational effectiveness are trust (Bryk & Schneider 2003; Hoy, Smith & Sweetland 2002) and collective efficacy (Goddard & Goddard 2001; Goddard, Hoy & Hoy 2000; Olivier & Hipp 2006). The purpose of this study was to explore teacher leadership through the wider lens of influences on the organization through the variables of teacher
leadership as practiced in a school, the collective efficacy of the faculty and the level of trust throughout the school building.

**Teacher Leadership**

Despite the many lenses through which teacher leadership has been studied, no single definition or job description has emerged. Teacher leadership has been viewed as a list of roles and responsibilities, as a process within the school or within the classroom, and as a mediating construct between the principal and student outcomes. Teacher leaders have most often been associated with a collaborative school culture (Cosenza 2015; Little 2006) to ‘lead beyond the classroom and contribute to a community of learners’ (Katzenmeyer & Moller 2001: 17). Furthermore, teacher leaders are sometimes viewed as agents of change, influencing colleagues to improve practice (Berry & Farris-Berg 2016; Cooper et al. 2016). The notion of teachers across the school practicing leadership has structured teacher leadership as a form of organizational density where large numbers of teachers are involved with decision-making and knowledge creation (Sergiovanni 2001).

In defining the construct of teacher leadership, researchers describe roles such as experts in instruction, mentors, risk takers, action researchers, those who seek lifelong learning, use facilitation and presentation skills, develop and maintain relationships, visit and observe other teachers, assist other teachers to improve practice, help schools develop coherent curriculum and understand politics and policy (Cosenza 2015; Feiler et al. 2000; Moller et al. 2001; Wynne 2001). Teacher leaders are also viewed in terms of behaviour toward a common goal (Harris 2005) as well as those who have the ability to take risks, are confident in problem solving, and are known for empowering others, respecting colleagues and developing support systems for other teachers (DiRanna & Loucks-Horsley 2001).

A review of extant literature finds some common areas of understanding regarding the value added for schools that embrace the idea of teacher leadership. The extent of teacher leadership in a school depends largely on a principal’s openness to shared leadership. Through shared leadership and decision-making, principals can include the voices from those closest to the core work of schools. Teachers offer different perspectives and new ways of thinking about instructional practice (Allen 2004), initiating change (Berry & Farris-Berg 2016; Mangin & Stoelinga 2008) and building capacity (Angelle & DeHart 2011; Curtis 2013; Muijs & Harris 2006).

Moreover, as Barth (2001) noted, the more teachers share decision making, the greater their sense of commitment to the school’s goals, mission and vision, thus, increasing their participation in taking on leadership roles. Through teacher leadership, relationships from teacher to teacher can grow stronger as teachers collaborate and learn together. Collaboration, including sharing expertise and sharing leadership, increases leadership capacity throughout the school (Angelle & DeHart 2011). These positive relationships influence student learning, and inspire excellence which ultimately improve the school as a whole (Harris 2003; Moller
et al. 2001). Wenner and Campbell (2017: 146), in their follow-up literature review to the work of York-Barr and Duke (2004), identified five general themes that encompassed teacher leadership. The five general themes were:

- Teacher leadership goes beyond the classroom walls
- Teacher leaders should support professional learning in their schools
- Teacher leaders should be involved in policy and/or decision making at some level
- The ultimate goal of teacher leadership is improving student learning and success
- Teacher leaders working toward improvement and change for the whole school organization.

However, not all teachers support their peers taking on a leadership role. Bowman (2004) found that when teachers take on a leadership role, colleagues view them as hungry for power, with a goal of gaining authority and control. Moreover, some teachers choose not to take on leadership responsibilities because they resist confronting difficult issues that may bring conflict.

While principal appointment of teachers to a leadership role is not reflective of the philosophy of shared leadership or shared decision-making, principal selection is, nonetheless, a common path to leadership for many teachers. Thornton, Langrall, Jones and Swafford (2001) recommended that principals should identify exemplary teachers and place them in situations that will prepare them for leadership roles, noting that professional development allows emerging leaders to grow. As pointed out by Angelle and DeHart (2011), while teachers may have the desire and skills to lead, supportive principals must provide opportunities so that teachers may practice leadership. Furthermore, Weiner (2011: 36) found that successful teacher leadership was supported by principals who ‘create[d] a clear vision of school reform and situate[d] the teacher leader’s work within that vision’.

**Trust**

For purposes of this study, the definition of trust, as identified by Tschannen-Moran and Hoy (2000: 556), was used; that is, trust is ‘one party’s willingness to be vulnerable to another party based on the confidence that the latter party is (a) benevolent, (b) reliable, (c) competent, (d) honest, and (e) open’. In their study of trust, Tschannen-Moran and Hoy (2000) noted that when employees (teachers) believe their superior (principal) has integrity, when the superior protects the employee and works to meet their needs, trust will increase. Seashore Louis (2007: 3) articulated two forms of trust. The first is institutional trust which is ‘the expectation of appropriate behavior in organized settings based on the norms of that institution’ and the second is relational trust, ‘the inevitable result of repeated interactions with others in modern organizations’. This study will address both.

Greater trust is engendered when there is a perception of integrity, a demonstration of care and concern, and a belief that communication is honest and accurate. Trust can be increased when relationships are positively fostered in an atmosphere of support and cordiality.
Just as organizations can foster trust, they can also create a culture of mistrust. Tschannen-Moran and Hoy (2000: 577) noted that organizational context influences whether this may occur. When the norms of the organization ‘emphasize ethical behaviors and a work environment of openness, trust, and respect’, then trust violations are less likely to occur. However, organizations ‘characterized by goal incongruence, internal politics and conflict, and shifting coalitions lend themselves to a greater number of betrayals’. Organizations which do not practice interdependence have no need for trust. If no relationship exists, trust is not required. The very nature of trust requires that it is entrenched in the social context of the organization (Brewster & Railsback 2003; Tschannen-Moran & Hoy 2000).

Trust has also been found to be a reciprocal element in schools. Principals extend trust through shared decision making and, in return, teachers extend greater trust in the principal. Hoy and Tschannen-Moran (1999) reported that schools where there was a high level of shared decision making also had higher levels of faculty trust in parents and students, thus, indicating the ‘ripple effect’ of trust. Kensler, Caskie, Barber and White (2010: 724), in their study of democratic processes in middle schools, found strong support that ‘faculty trust mediates the relationship between democratic community and continuous and team learning, with faculty trust explaining 71% of the relationship’. Moreover, in this same study, Kensler and colleagues (2010: 724) found that ‘the democratic principles in action … significantly predict[ed] higher levels of trust, including trust in the principal, colleagues, and clients’. Gray (2016: 123) discovered that ‘collective trust (faculty trust in students, parents, colleagues, and the principal) had a strong influence on organizational effectiveness, controlling for all the other variables including SES’. Reciprocal trust was also found to be an integral element of student learning. Specifically, Tschannen-Moran and Gareis (2015: 257) discovered that ‘student learning is facilitated by equipping school leaders and teacher leaders to more fully realize their positive intentions for their professional relationships resulting in strong relationships of trust’.

Trust in schools has been shown to be a resource in reform (Bryk & Schneider 2002, 2003). Noonan, Walker and Kutsyuruba (2008: 1) cited ‘the importance and pervasiveness of trust (or its betrayal or absence) … [as] implicit in our every effort to establish communities of learners and generative settings for the expression of our shared educational ambitions’. Schools which had high levels of trust more easily implemented complex change in their organization than did schools with low levels of trust. Seashore Louis (2007: 20) found three variables that enhanced trust in schools, including:

1. perceived influence over how decisions are made;
2. a sense that decision makers take stakeholder interests into account; and
3. an agreed upon and objective measure of the effects or outcomes of implemented decisions.

The extent of the culture of trust in a school is the collective trust between all parties; that is, the administration, the teachers, the parents and the students. Hoy and Miskel (2008: 194) pointed out that ‘the evidence is mounting that trusting relations among teachers, parents, and students promote student achievement and improvement’. Furthermore, Tschannen-Moran and Goddard (2001) also found an indirect relationship between trust and student achievement, as mitigated by the collective efficacy of the faculty. A study of North Carolina teachers found that trust was strongly correlated not only with student achievement but also strongly correlated with teachers’ employment decisions, where 66 per cent of North Carolina educators who intended to continue working at their school likewise agreed that their school had a trusting and respectful culture. Thus, research reflects that trust is an essential construct for school effectiveness and school improvement. Collective efficacy is the third variable examined in this study.

Collective Efficacy

Bandura (1986: 1176) noted that, ‘among the mechanisms of personal agency, none is more central or pervasive than people’s beliefs about their capabilities to exercise control over events that affect their lives’. People with high levels of self-efficacy behave in ways that make them more productive and successful, whereas, people with low self-efficacy choose tasks that take minimal effort and when faced with challenges, quickly forego the effort (Bandura, 1977).

While self-efficacy is essential to the individual, collective efficacy refers to the larger group in an organization. Collective efficacy is ‘the perception[s] of teachers in a school that the faculty as a whole can organize and execute the courses of action required to have a positive effect on students’ (Goddard & Goddard 2001: 809). Collective efficacy beliefs are based on the perceptions that teachers have of the whole school, as opposed to self-efficacy, that is, belief in self. In this way, collective efficacy differs from self-efficacy because collective efficacy is a property of the school (Tschannen-Moran & Barr 2004). As Goddard et al. (2004: 8) explained, ‘just as teachers’ sense of efficacy partially explains the effect of teachers on student achievement, from an organizational perspective, a faculty’s sense of collective efficacy helps to explain the differential effect that school cultures have on teachers and students’.

The perceived collective efficacy of teachers within a school is a construct that is associated with student achievement (Goddard et al. 2000; Gray & Tarter 2012). Bandura (1993) found that schools with stronger shared beliefs in their instructional efficacy had higher student academic achievement. Tschannen-Moran and Barr (2004) also found a positive relationship between collective efficacy and student achievement. Additionally, Gray (2016), using
multiple regression, found that collective efficacy was a statistically significant predictor of school effectiveness.

Collective efficacy sets expectations for actions of the faculty as a whole that influence the way that each faculty member then behaves (Goddard, LoGerfo & Hoy 2004). Collective efficacy influences classroom management, classroom instruction, and the ways in which teachers motivate students (Tschan nen-Moran & Barr 2004). Collective efficacy may have a reciprocal effect on teachers’ individual self-efficacy where schools with higher collective efficacy will likely have teachers with higher self-efficacy and schools with low collective efficacy will likely have teachers with lower self-efficacy (Goddard et al. 2004). Previous research has indicated that there is a clear and strong relationship between collective efficacy and teacher leadership (Angelle & Teague 2014).

**Methods**

**Participants**

The data drew from a sample of 443 teachers across 25 schools. The respondents were 74.8 per cent female with a mean teaching experience of 13.47 years. On average, respondents had 8.94 years of teaching experience at their present school (see Table 1 for demographic information of study respondents). Table 1 does not indicate 100 per cent of the total number due to missing values associated with nonresponse on certain items. While this was a study of teacher leadership, 71 per cent of the respondents indicated they did not hold a leadership role. However, 78 per cent responded that they did work in a collaborative group. Over 68 per cent of the respondents held more than a Bachelor degree.

**Table 1: Study respondents demographic information**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>109</td>
</tr>
<tr>
<td>Female</td>
<td>323</td>
</tr>
<tr>
<td><strong>Leadership and Collaboration</strong></td>
<td></td>
</tr>
<tr>
<td>Holds a leadership role</td>
<td>123</td>
</tr>
<tr>
<td>Does not hold a leadership role</td>
<td>309</td>
</tr>
<tr>
<td>Works in a collaborative group</td>
<td>334</td>
</tr>
<tr>
<td>Does not work in a collaborative group</td>
<td>94</td>
</tr>
</tbody>
</table>
## Instruments

This exploratory study utilized three empirically tested and validated scales: the Teacher Leadership Inventory, the Omnibus T-Scale and the Teacher Efficacy Belief Scale–Collective Form. The three instruments, along with demographic questions, were administered through an electronic survey. The following sections will describe each instrument and provide reliability statistics on each for the current study.

### Teacher Leadership Inventory

The Teacher Leadership Inventory (TLI) was designed by Angelle and DeHart (2011: 148) ‘to measure the extent of teacher leadership in schools’. The TLI consists of 17 statements constructed along a four-point Likert scale (never, seldom, sometimes and routinely). The instrument is further broken down into four subscales: Sharing Expertise ($\alpha=.79$), Sharing Leadership ($\alpha=.82$), Supra-Practitioner ($\alpha=.82$) and Principal Selection ($\alpha=.61$). Angelle and DeHart (2010) originally reported a Cronbach’s alpha of .85 for the entire instrument. However, the alpha level for the current study was .76.

The Sharing Expertise factor is composed of five items that ‘focus on the sharing of pedagogical or classroom management knowledge. These items measure not only the perceptions of teacher leader skills but also their willingness to share these skills and knowledge with fellow teachers’ (Angelle & DeHart 2011: 149).

The Sharing Leadership factor encompasses the reciprocal nature of leadership in a school. Specifically, the factor focuses on the ‘willingness of the principal to share leadership and the willingness of the teacher to accept the challenges to lead’ (Angelle & DeHart, 2011: 149).

The Supra-Practitioner factor ‘measures perceptions of teacher behaviors that are not only beyond the prescribed roles but also are engaged in willingly by the staff’ (Angelle & DeHart 2011: 149). Supra-Practitioners are willing to go ‘above and beyond’ regardless of job description or formal capacity.

Principal Selection is conceptually different from the other constructs, but does serve as a way for teachers to exhibit leadership within schools. This factor ‘paints a picture of a principal who creates in-groups among certain teachers as well as a principal who takes exception to certain teachers showing leadership, thus creating out-groups’ (Angelle & DeHart 2011: 150).
Teacher Efficacy Belief Scale–Collective Form

The Teacher Efficacy Belief Scale–Collective Form (TEBS–C) is a unidimensional, ten-item instrument (Olivier 2001). The TEBS–C was designed specifically to ‘assess teachers’ perceptions about the collective strength of beliefs of faculty members at their school regarding their capabilities to organize and successfully carry out tasks within the context of their school environment’ (Olivier & Hipp 2006: 511). Responses to items are measured on a 4-point Likert scale that ranged from ‘Weak Beliefs’ (1) to ‘Very Strong Beliefs’ (4). The alpha reliability of the TEBS-C for the current study was 0.94.

Omnibus T-Scale

The Omnibus T-Scale was developed by Hoy and Tschanne-Moran (1999) to measure teacher trust. The Omnibus T-Scale is made up of three distinct subscales including: Trust in the Principal, Trust in the Faculty and Trust in the Client. The scale has 26 items measured on a six-point Likert scale, ranging from ‘Strongly Agree’ to ‘Strongly Disagree’.

The reliability of each scale was measured using Cronbach’s alpha. The alpha-levels for the current study for each subscale ranged from .91 to .95 (Trust in Principal, \(\alpha = .95\); Trust in Colleagues, \(\alpha = .92\); Trust in Clients, \(\alpha = .91\)). The overall reliability for the entire Omnibus T-Scale was \(\alpha = .94\).

Methodological Approach

To more fully understand the relationship between collective efficacy and trust on teachers’ perceptions of leadership within schools, this study employed a multiple regression analysis. Multiple regression is a useful way to assess and understand the relationship between a set of independent variables (IVs) and a dependent variable (DV) (Tabachnick & Fidell 2013). Other advantages of multiple regression include the flexibility to use categorical and continuous IVs, to have multiple IVs and its versatility in investigating both experimental and nonexperimental research designs (Keith 2014). In addition, multiple regression was selected because of its ability to be both predictive and ‘explanatory’. Keith (2014: 19) noted that, ‘explanation subsumes prediction’; thus, the ability to predict an outcome denotes the ability to first be able to explain that same outcome.

Before running the analysis, a number of assumptions including the ratio of cases to IVs, outliers, multicollinearity, singularity, normality, linearity, heteroscedasticity and independence of errors were checked (Tabachnick & Fidell 2013). All assumptions were satisfied to move forward.

The initial independent variables for the analysis were the mean score on the TEBS-C and the mean score for each subscale of the Omnibus T-Scale (Clients, Principal and Colleagues). After finding statistical significance, a follow-up regression with additional variables was run to compare to the initial findings. The follow-up regression included the following independent variables: gender, highest-level of education, total years of teaching experience, whether a respondent held a formal leadership role, whether a respondent worked in a collaborative
work group, mean score on the TEBS-C and the mean score for each subscale of the Omnibus T-Scale. The findings from this analysis were similar to the initial regression and were reported for this study.

The dependent variable for the multiple regression analysis was the total score on the TLI. Categorical variables were dummy coded appropriately. Cases with missing values were excluded listwise. Descriptive data for variables can be found in Table 2.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>Std. Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collective Efficacy</td>
<td>1.00</td>
<td>4.00</td>
<td>2.87</td>
<td>.671</td>
</tr>
<tr>
<td>Trust in Clients</td>
<td>1.20</td>
<td>6.00</td>
<td>4.02</td>
<td>.77</td>
</tr>
<tr>
<td>Trust in Principal</td>
<td>1.00</td>
<td>6.00</td>
<td>4.69</td>
<td>1.09</td>
</tr>
<tr>
<td>Trust in Colleague</td>
<td>2.13</td>
<td>6.00</td>
<td>4.79</td>
<td>.77</td>
</tr>
<tr>
<td>Total Years Teaching</td>
<td>0</td>
<td>46</td>
<td>13.47</td>
<td>9.33</td>
</tr>
</tbody>
</table>

### Findings

The results indicated that this set of independent variables was significantly related to a teacher’s score on the TLI ($F$ (11,422) = 33.467, $p < .001$). This set of independent variables explains approximately 45 per cent of the variation of TLI scores ($R = .683$, Adj. $R^2 = .452$). The 45 per cent of explained variation attributed to this set of independent variables is considered large (Cohen 1988). Statistically significant predictors included collective efficacy, trust in the principal, trust in colleagues, years in teaching and working in collaborative groups.

Standardized and unstandardized coefficients, squared semi-partial correlations ($sr^2$) and $p$-values are reported in Table 3. The table includes squared semi-partial correlations in addition to standardized and unstandardized coefficients to detail the unique contribution of that particular independent variable to the total variance of the TLI score. Squared semi-partial correlations relay an element of practical significance that allows individuals to weigh the influence of each IV on the outcome in addition to and independent of statistical significance.

The three independent variables with the largest contribution to the variance in TLI scores were collective efficacy, working in a collaborative group and trust in the principal. For every one-unit change in collective efficacy scores on the TEBS–C, the TLI score increased by 3.64 points. For every one-unit change in trust in principal scores on the Omnibus T-Scale, teachers’ TLI score increases by .878 points. Individuals who work in collaborative groups scored 2.30 points higher on the TLI than teachers who did not work in collaborative groups.
This particular set of independent variables explained 45.2 per cent of the total variability in TLI scores.

**Table 3: Multiple regression results**

<table>
<thead>
<tr>
<th>Variable</th>
<th>B</th>
<th>b</th>
<th>sr.²</th>
<th>Sig</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collective Efficacy</td>
<td>3.636</td>
<td>.421</td>
<td>.085</td>
<td>***</td>
</tr>
<tr>
<td>Trust in Clients</td>
<td>-.209</td>
<td>-.028</td>
<td>.000</td>
<td></td>
</tr>
<tr>
<td>Trust in Principal</td>
<td>.878</td>
<td>.166</td>
<td>.019</td>
<td>***</td>
</tr>
<tr>
<td>Trust in Colleague</td>
<td>1.008</td>
<td>.134</td>
<td>.010</td>
<td>***</td>
</tr>
<tr>
<td>Total Years Teaching</td>
<td>.062</td>
<td>.101</td>
<td>.010</td>
<td>***</td>
</tr>
<tr>
<td>Male (Female – reference group)</td>
<td>-.916</td>
<td>-.069</td>
<td>.004</td>
<td></td>
</tr>
<tr>
<td>Holds a Leadership Role (Does not – reference group)</td>
<td>.391</td>
<td>.030</td>
<td>.000</td>
<td></td>
</tr>
<tr>
<td>Works in a Collaborative Group (Does not – reference group)</td>
<td>2.297</td>
<td>.167</td>
<td>.026</td>
<td>***</td>
</tr>
<tr>
<td>Less than Bachelor (Bachelor – reference group)</td>
<td>.591</td>
<td>.017</td>
<td>.000</td>
<td></td>
</tr>
<tr>
<td>Masters Degree (Bachelor – reference group)</td>
<td>-.132</td>
<td>-.011</td>
<td>.000</td>
<td></td>
</tr>
<tr>
<td>Beyond a Masters Degree (Bachelor – reference group)</td>
<td>.608</td>
<td>.048</td>
<td>.001</td>
<td></td>
</tr>
</tbody>
</table>

Note. R = .683 and Adj. R² = .452 (N = 423, p < .001)

***p < .001

**Discussion**

The current study examined the relationship between teacher leadership as a resultant outcome from the organizational influences of collective efficacy and trust. The examination highlighted the simultaneous, intertwined and synergistic effects of collective efficacy and trust on teacher leadership within schools.
Findings from the study supported the previous findings of Derrington and Angelle (2013: 6) of ‘a clear and strong relationship between collective efficacy and the extent of teacher leadership in a school’. This finding was not only statistically significant, but accounted for a large, practical amount of the total variation of teacher leadership. Increased beliefs in collective efficacy have been shown to have positive effects on school culture, staff behavior, classroom management, classroom instruction, and, per this study, teacher leadership within schools (Goddard et al. 2000; Goddard et al. 2004; Tschannen-Moran & Barr 2004). Coupled with the findings on collective efficacy, the fact that simply working in a collaborative group positively affects teacher leadership demonstrates that leadership extends beyond a formal title or designated role. Teacher leadership moves past the notion that leadership is vested in an individual and suggests that teacher leadership more closely approximates a manifestation of the real collaborative efforts of individuals working as a collective towards a shared goal within schools. The current study expands upon the literature by demonstrating that even while controlling for trust within a school, collective efficacy was the strongest organizational predictor of teacher leadership.

Teacher trust in the principal and colleagues was also demonstrated to have a substantive influence on teacher leadership. Trust has been shown to play an integral role in shared decision making, student achievement, school improvement and team learning within schools (Hoy & Miskel 2008; Hoy & Tschannen-Moran 1999; Kensler et al. 2010). Our study adds to those findings and suggests that trust, in concert with collective efficacy, positively influences the levels of teacher leadership exhibited within schools.

In a novel way, the current study disentangled the ever-popular outcome measure of student achievement from the analysis and began to answer how collective efficacy influenced teacher leadership independent of the usual suspects of student outcomes. The intrinsic nature of the inquiry directly assessed teacher leadership within schools as an outcome worthy of analysis separate from and independent of an association with any other outcome measures. Essentially, the study adopted an ‘if you build it, they will come’ orientation to teacher leadership and demonstrated that schools that had high levels of collective efficacy and trust fostered the necessary conditions and cultures to realize high levels of teacher leadership and benefit from the resultant favorable outcomes from an environment rich in teacher leadership.

**Recommendations for Further Study**

Utilizing multilevel models to partition the variance appropriately to more fully understand the contribution of teacher- and school-level variables to teacher leadership is strongly urged. The structural organization of the phenomenon of interest, teachers being nested within schools, makes research that leverages analytical methods that accounts for the multilevel structure pertinent. This type of quantitative analysis would really begin to interrogate the influence of school-level phenomenon (e.g. culture, interventions, processes) on teacher leadership in addition to variables at the individual teacher level.
In addition to the suggested quantitative examinations, the researchers encourage future study using qualitative methods that uncover the ways in which principals create spaces where collective efficacy and trust can prosper. We believe it is not an accident that these positive cultural elements of schooling manifest as positive influences on teacher leadership. However, what is not known is exactly how principals intervene to create schools where collective efficacy and trust prosper.

This study contributes to the existing literature on teacher leadership by examining how collective efficacy and trust contribute to teacher leadership. It provides empirical evidence that suggests that administrators who desire high-levels of teacher leadership in their school may first want to investigate the collective efficacy and trust among their staff. Recommendations for further study include using quantitative methodologies that account for the multilevel structure of schools and qualitative examinations of principals who have been successful in creating environments conducive of high-levels of teacher leadership in a variety of contexts.

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Leading Beyond the Classroom

Pamela S. Angelle

Abstract: This article provides a synopsis of five empirical papers presented in the special issue of International Studies in Educational Administration. Findings from research in Ireland, Scotland, China, and the United States presented evidence that teacher leadership encompassed more than individual characteristics but was a school-wide construct with influence on school climate and culture, school improvement, and school reform. Furthermore, the studies in this issue offered examinations of teacher leadership both spatially (across international borders) and temporally (across significant times in a teacher’s career). Contextual differences in working conditions, policy, and teacher leader responsibilities were also found. This article concludes with a discussion of a three factor model of teacher leadership which is teacher driven, found in the Ireland, Scotland, and USA contexts while a four factor model, centred on principal selection, was found in the Chinese context.

Keywords: teacher leadership, teacher influence, international studies, teacher leader model

Viewing teachers as leaders in their own classrooms, practicing creative pedagogy and engaging students, has traditionally characterised teacher leaders. Noting that teacher leadership frequently has been defined as ‘a set of practices that enhance the teaching profession’, Killion et al. (2016: 4) conclude that a more appropriate categorisation of teacher leadership moves beyond practices of teaching to encompass school-wide improvement. Furthermore, Tsai (2015: 131) viewed teacher leadership in terms of influence; that is, ‘the process by which teachers, individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement’. This issue of International Studies in Educational Administration promotes this widening of the lens to view teachers as leaders throughout the school organisation. This article provides a synthesis of the five empirical papers, and begins with a re-consideration of the content of these papers.

In the first article King placed her study of teacher leadership within a preservice special education teacher preparation module. Through experiential learning and reflective practice, findings showed that the preservice teachers in this study felt better prepared to work as an inclusive practices teacher leader. Grounding the teacher’s preparation in research literature, followed by lived experiences, King demonstrated the value of linking theory to practice and
increasing preservice teacher self-efficacy so they become teachers who are ready to lead students and collaborate with colleagues. Thus, teacher preparation programmes that instill students with skills on both how to lead, as well as the value of leading beyond the classroom, increase confidence and ability when the preservice teachers begin their work.

Torrance and Murphy suggested that teacher leadership is a quality, rather than a responsibility, and one that invokes judgements of expertise and credibility. However, crediting policy fudge, these authors noted teacher leadership is defined differently from school to school. Some teachers share leadership while others are sometimes delegated additional tasks for no stipend. Moreover, in other cases, the selective nature of offering a limited group of teachers opportunities to lead makes teacher leadership a barrier to school effectiveness. Vague and unclear policies have relegated the success of teacher leadership to the school level, with the practice of teacher leadership dependent upon the school’s context, goals, and leadership propensities. Issues such as distributed leadership, power, accountability, responsibilities, and authority/compliance, will all impact on how and how much teacher leadership will be successfully practiced. Thus, teacher leaders in Scotland may have an organisational influence on school reform, or may be left to practice leadership within the classroom walls.

The Chinese culture of seniority and deference to hierarchy dominated the research of Szeto and Cheng. The authors referred to teacher leaders as the ‘chosen ones’. Whether teachers had the desire to lead, or the skills to lead, the work of teacher leadership was greatly dependent on being offered opportunities to lead by the school principals. Szeto and Cheng found that providing early career teachers with professional development and in-school learning was influential in preparing teachers to lead when opportunities were presented. While this study took place in China, this hierarchical perspective of leadership is not wholly absent in Western schools, though, perhaps, not as common. Nonetheless, this study reinforces the view that context and principal views on sharing leadership with teachers were critical factors in the opportunities provided to the teacher leaders.

Teacher leaders who function in teacher evaluation capacities serve the students and the school through support for effective pedagogy. Bradley-Levine, Mosier and Reichart explored the work of teacher leaders in the school-wide role of teacher evaluator. They found that teachers who worked in these roles had opportunities to collaborate with colleagues to discuss best practices, discuss and facilitate teaching strategies, and practice communication skills in addressing refinement needs with fellow teachers. The authors also found that teacher leaders walked a delicate balance when impacting whole school change. Working in this capacity provided teacher leaders with a larger influence on improving teaching and student achievement across the school.

Flood and Angelle looked to school-wide relationships of trust and collective efficacy as outcomes of the practice of teacher leadership. Previous research (Goddard, Hoy & Hoy 2000; Tschannen-Moran & Barr 2004) found that collective efficacy has positive effects on school
culture, student behaviour, and classroom instruction. Thus, arguably, teacher leadership provides a distal link to these school-wide positive constructs. Moreover, trust has been linked to student achievement and school improvement (Hoy & Miskel 2008; Hoy & Tschannen-Moran 1999), thereby demonstrating the positive influence of teacher leadership, not just on the individual teachers, but on the larger school organisation as well.

The articles in this special issue hold significance in the field as further evidence that teacher leadership is not merely an individual characteristic, nor is the practice of teacher leadership limited to a teacher’s excellence in the classroom. The construct of teacher leadership is a school-wide phenomenon that impacts school effectiveness and improvement, school culture, principal–teacher trust, and teacher collective efficacy. Moreover, these studies add to the literature on change, teacher development, international studies, and teacher influence.

Berry and Farris-Berg (2016: 12), in their work with teacher powered schools, noted that ‘there is a growing movement to transform the profession with teachers serving as the agents of change—rather than being the targets of it’. The teacher leaders in this issue worked to bring about change through teacher evaluation (Bradley-Levine, Mosier & Reichart), working with special education teachers (King), and building trust (Bradley-Levine, Mosier & Reichart; Torrance & Murphy; Flood & Angelle). The work of teacher leaders in China was a dramatic cultural change for schools whose leaders traditionally worked under hierarchical, authority-compliance leadership philosophies (Szeto & Cheng).

Teacher development was highlighted in three articles (King; Szeto & Cheng; Torrance & Murphy). Highlighting the importance and work of teacher as leader in the developmental stages of their career, reinforces the notion of preparation. Teachers who step into the classroom ready to lead children and model best practices for their peers begin their leadership work at an advantage. Through this, novice teachers develop trust, build relationships, and increase their self-efficacy, contributing to the collective efficacy of the school faculty.

A unique aspect of the articles in this journal is the contextual and temporal nature of the studies. The contextual differences across the four countries highlighted in the articles shine a light on policy, working conditions, differing perspectives, and teacher leader responsibilities. Yet there are also similarities regarding the contributions of, and barriers to, teacher leadership. From a temporal standpoint, the articles are placed at different points during a teacher’s career. In this special issue, teacher leadership is studied at the preservice level (King), immediately following a teacher preparation programme (Torrance & Murphy; Szeto & Cheng), and with mid- to late-career experience (Bradley-Levine, Mosier & Reichart; Flood & Angelle). This distinctive view of teachers across countries, and across time spans in a teacher’s career, provide the reader with a larger perspective of the development, practice, and outcomes of teacher leadership, both for the individual, and the school.

Previous research (Angelle & DeHart 2011, 2016) has resulted in models of teacher leadership that incorporate factors by which to measure the extent of teacher leadership in a school. The
first factor, Sharing Expertise (SE), focuses on the perceptions of teachers’ pedagogical and classroom management skills as well as their willingness to share those skills with their fellow teachers. The second factor, Sharing Leadership (SL), describes a reciprocal relationship existing between the principal and the teachers in a school. This factor is composed of two sub-factors: Leadership Opportunities (SLO) and Leadership Engagement (SLE). The first sub-factor depends upon a principal’s attitude toward offering opportunities for teachers to engage in leadership practices, while the second sub-factor reflects teachers’ inclination to take on leadership responsibilities. The perceptions of teachers’ willingness to go above and beyond their prescribed roles are indicated by the third factor, Supra-Practitioner (SP). Four of the five studies (King; Torrance & Murphy; Bradley-Levine, Mosier, & Reichart; Flood & Angelle) reflected a three factor model of teacher leadership, as depicted in Figure 1. In this model, teacher leadership is explained by the three factors that comprise a teacher-driven leadership component.

**Figure 1**: Three factor model of teacher leadership

![Figure 1](image-url)

SE = Sharing Expertise  
SLE = Leadership Engagement  
SP = Supra-Practitioner

Contextual factors, described in the Szeto and Cheng article, found traditional Chinese schools focus on hierarchy and seniority with the principal at the top of the hierarchy. Thus, for this study, the factor of principal selection of teacher leaders applies, resulting in a four factor model of teacher leadership as depicted in Figure 2. Principal Selection targets the
teachers’ perceptions that the principal controls which teachers may participate in leadership activities.

**Figure 2.** Four factor model of teacher leadership

![Diagram](image)

The research presented in this issue confirms the notion that teacher leadership is a construct that influences the larger organisation in which leadership is practiced. As pointed out by Killion et al. (2016: 5), ‘because they have daily contact with students, [teachers] are in the best position to make critical decisions about issues related to teaching and learning’. While leadership is equated to power, teacher leadership is related to influence (Killion et al. 2016; Tsai 2015). Mentoring, sharing expertise with colleagues, sharing leadership with administrators, and working to improve student achievement and school culture are all ways in which the influence of teacher leadership is felt. Through the voices and perceptions of teachers documented in this issue, across spatial and temporal boundaries, teacher leadership may be seen as the core of school improvement and school effectiveness as teachers lead beyond the classroom.

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