First Fellowship Then Followership: Training for a New Generation of Teacher Leaders

Rebecca Davis Danello

Dissertation Submitted to the Faculty of the

Virginia Polytechnic Institute and State University

In partial fulfillment of the requirement for the degree of

DOCTOR OF EDUCATION

In

Educational Leadership and Policy Studies

Dr. Travis W. Twiford, Co-chairman

Dr. Walter D. Mallory, Co-chairman

Dr. Richard G. Salmon

Dr. Larry Byers

Dr. Russell L. Watson

March 28, 2008

Blacksburg, Virginia

Keywords: Teacher Leaders, Teacher Leadership, Professional Development, Case Study, Principals, Mentors

Copyright 2008, Rebecca Davis Danello

First Fellowship Then Followership: Training for a New Generation of Teacher Leaders

Rebecca Davis Danello

ABSTRACT

The teachers' lounge was once the only oasis of camaraderie among teachers engaged in the rigors of public education. Today, fellowship among teachers looks quite different and is no longer relegated to the teachers' lounge. Indeed, in a successful school it is pervasive, and so are the teachers who become leaders of their fellow colleagues and play a significant role in school improvement and renewal. Operating in a variety of roles and possessed of personal and professional traits that have earned them the respect of their colleagues, principals, and district leaders, these teacher leaders have enriched the instructional landscape and the cultures of their schools.

However, the research suggests that, in general, teacher leaders themselves have received little, if any, formal training for their jobs as leaders among their peers. As principals rely more on the expertise of these teachers, as the complexities of public education continue to multiply, and as the demographics of the teaching profession change, an obligation exists to investigate the professional development needs of teacher leaders. Teacher leaders must be skilled in building trusting, respectful relationships, a professional fellowship, among their peers if they wish for them to follow their lead down the path to self-improvement, student achievement, and school excellence. A mission of this importance deserves the best teacher leaders that training can produce. An examination of the necessary knowledge, skills, and dispositions and how teacher leaders develop them will help school districts provide specialized training for them.

DEDICATION

This dissertation is dedicated to all the talented teacher leaders with whom I have been privileged to work. Their devotion to their students, colleagues, and schools is a noble example to everyone in the education community. I am particularly thankful to my own teacher leader, Anne Braswell McGee, who mentored me as a young teacher, investing her time and trust. For me, she *was* scholarship and excellence, a role model without comparison. I am indebted to her for the part she played in making me the educator I came to be.

I also dedicate this dissertation to my mother, Constance Rebecca Sullivan Davis, who was always so very proud of me. She was with me when I began this program, and I deeply regret that she is not with me now that I have finished it. But I know that where she dwells now she is flashing her beautiful smile and her heart is bursting with pride.

Finally, I dedicate this work to my husband John, who has been infinitely patient.

ACKNOWLEDGMENTS

So many individuals must be thanked. First, I thank Dr. Cecelia Krill for having confidence in me and starting me on this journey. My thanks also go to Dr. David Parks, who held me to a standard of excellence and was instrumental in the first stage of my dissertation. I am grateful to Dr. Stephen Parson, who shepherded me through the prospectus. Finally, I am indebted to Dr. Walter Mallory for his guidance as I finished this dissertation. His kindness and motivation were my constant companions as I approached the end of this last chapter.

I am also grateful for the oversight of my committee. Dr. Richard Salmon was with me from the very beginning, and Dr. Walter Mallory and Dr. Travis Twiford served on my prospectus committee and again as my co-chairmen for the dissertation defense. Their assistance was invaluable. My special thanks go to Dr. Russell Watson, my former superintendent, whose extraordinary leadership was a model of courage in the face of many challenges. This legacy is exceeded only by his great kindness to me and an unwavering commitment to quality public education. All of these gentlemen were unselfish in their support and time.

I must also express my gratitude to Becky Alexander, who entered this program with me as a stranger but has become the best of friends. What a lovely dividend in a process that has definitely required a confidante, commiserator, and cheerleader!

Lastly, this study would not have been possible without the six teacher leaders who agreed to join me in my research. They were generous with their time, candid in their comments, and trusting in my ability to tell their stories. They are a credit to their profession, and as long as they and others like them are allowed to build a professional fellowship among their colleagues, they will be followed down the road to school improvement and student achievement.

TABLE OF CONTENTS

Page

ABSTRACT……ii

DEDICATION……iii

ACKNOWLEDGMENTS……..…iv

LIST OF FIGURES…….v

LIST OF TABLES…….vi

TABLE OF CONTENTS……..vii

CHAPTER I: INTRODUCTION….....1

Context of the Inquiry……..1

Research Questions……..2

Definition of Terms…….….2

Teacher Leadership……..2

What it is not……3

Where to find it……4

Dimensions, frameworks, and features……4

Teacher Leaders…….....5

Professional traits……5

Personal traits…….....5

Interpersonal traits…….....6

Roles……6

Current Issues Relating to Teacher Leadership.....6

Attracting and Retaining Teachers……...7

Principals Need Help……...8

Community Support for Enhancement of Teacher's Role in Leadership…9

Background of Teacher Leadership…….9

Theoretical Conceptualizations of and Commentary on Teacher Leadership…...10

Principals: The Support They Offer and the School Culture They Create11

Community……11

Culture.....12

Situational Leadership……...13

Servant Leadership…….14

Focusing on People, Not Structures……...15

CHAPTER II: REVIEW OF THE LITERATURE...……17

Analysis of Research Studies on Teacher Leadership……...17

Research Studies Included for Review……..17

An Overview of the Studies……...17

Methodologies……18

Samples……..18

Teacher Leaders and Their Professional Development and Training…... 18

The Principal as a Trainer of Teacher Leaders...……...19

Who Are Teacher Leaders and What Skills Do They Need? ….. 20

Partnerships for Professional Development of Teacher Leaders...22

Speaking from Experience: Veteran Teacher Leaders...……24

Conclusions and Implications……26

Need for Research...……..……29

CHAPTER III: RESEARCH DESIGN AND METHODOLOGY……...….30

Purpose of the Study…….….30

Research Design: A Cross-case Study Involving Description and Interpretation 30

Research Questions...……31

Procedures...……..31

Assumptions and Rationale for a Qualitative Design……31

The Researcher's Role..…….31

Gaining Access and Entry..……..…….32

Setting Selection……33

Participant Selection……..33

Assurance of Confidentiality…….34

Data Collection: Instrumentation and Procedure..…….34

Interviews..…….35

Personal Documents..…….……36

Electronic Journals…….36

Artifact Collections……36

Observations……..36

Controls for Validity……..37

Data Management and Analysis……...…….38

Transferability……39

Confirmability……39

Presentation of Findings……39

CHAPTER IV: RESULTS…….41

Introduction…….....…..41

Context for the Study…….41

Research Questions……41

Instrumentation……..42

The Case Studies……47

The Case of Fran……47

Profile…….47

Knowledge, Skills, and Dispositions…….47

Situations and Opportunities for Leadership…….49

Principal…….50

School climate and environment...…….51

Mentors..……51

Formal Training.....52

The Case of Holly…….…….……52

Profile…...…….52

Knowledge, Skills, and Dispositions.....53

Situations and Opportunities for Leadership…….55

Principal…….55

School climate and environment……55

Mentors……..56

Formal Training…….56

The Case of Lucy…….....56

Profile……56

Knowledge, Skills, and Dispositions……57

Situations and Opportunities for Leadership……58

Principal……59

School climate and environment……59

Mentors……..59

Formal Training……60

The Case of Ted……60

Profile……60

Knowledge, Skills, and Dispositions……61

Situations and Opportunities for Leadership……63

Principal……63

School climate and environment……64

Mentors……..64

Formal Training……64

The Case of Donna……65

Profile……65

Knowledge, Skills, and Dispositions……65

Situations and Opportunities for Leadership……67

Principal……68

School climate and environment……68

Mentors……..68

Formal Training……68

The Case of Reba……...69

Profile…….……69

Knowledge, Skills, and Dispositions.....69

Situations and Opportunities for Leadership…….71

Principal…….……72

School climate and environment……72

Mentors……..72

Formal Training……73

Compilation of Data across Cases.. …….74

Survey Data: Participant Profile Sheets and
Principal and Supervisor Nomination Forms……74

Summary of the Data Coded to the Major Themes of the Conceptual
Model as Reflected in Interviews, E-journals, Portfolios, and
Observations across Case Studies…….……76

Knowledge, Skills, and Dispositions…….……76

Knowledge.....79

Skills……..79

Dispositions……...82

Situations and Opportunities for Leadership…….86

Principal.....88

School climate and environment……89

Mentors..……90

Formal Training…….91

Participants' own training...…….. ……91

Participants' proposal for training…….92

CHAPTER V: DISCUSSION OF FINDINGS, CONCLUSIONS, LIMITATIONS, IMPLICATIONS, AND RECOMMENDATIONS……98
Discussion of Findings……...98
First Subordinate Research Question……98
Second and Third Subordinate Research Questions……..99
Fourth Subordinate Research Questions……..100
Findings Related to the Conceptual Model.....100
Knowledge, Skills, and Dispositions…….…….....100
Knowledge..……101
Skills……102
Dispositions……103
Situations and Opportunities for Leadership……..103
Situations……104
Principal……...105
School climate and environment……105
Mentors……107
Formal Training……...108
Participants' Own Training……108
Proposed Training for Teacher Leaders……..109
Who……109
When……...110
Where……..110
What……110
How……113

Conclusions, Implications, and Recommendations…….114

Recommendations for Future Study……119

REFERENCES……122

APPENDICES

Appendix A: Nomination Letter and Teacher Leader Nomination Form…….……..127

Appendix B: Informed Consent for Participant of Investigative Project……...129

Appendix C: Participant Letter……...……131

Appendix D: Data Management Matrix for Selection of Sample from Population of Administrator-nominated Teacher Leaders...……...……132

Appendix E: Participant Profile Sheet……133

Appendix F: Interview Protocol……..……135

Appendix G: Protocol for Electronic Journal Entries…….137

Appendix H: Observation Field Notes Matrix…….……..…….138

Appendix I: Directions to Teacher Leaders for Artifact Collections……..139

LIST OF FIGURES

Page

Figure 1: Conceptual Model for the professional development of teachers……..27
Figure 2: Proposed Teacher Leader Training Academy……97

LIST OF TABLES

Page

Table 1: Roles of Teacher Leader Participants as Denoted by Participants in Their Profile Surveys……..44

Table 2: Roles of Teacher Leader Participants as Denoted by Their Principals or Supervisor in Their Nomination Forms ……...44

Table 3: Characteristics of Teacher Leader Participants as Denoted by Their Principals and Supervisor ……...45

Table 4: Characteristics of Teacher Leader Participants as They Perceived Themselves in Their Profile Surveys ……..45

Table 5: Primary Influences on Development of Teacher Leader Participants as Denoted by Teacher Leader Participants in their Profile Surveys ……46

Table 6: How Participants Defined a Teacher Leader……...77

Table 7: Participants' Suggested Topics for Inservice……..92

CHAPTER 1: INTRODUCTION

There has been little training targeted specifically at teacher leaders other than sometimes haphazard or even accidental mentoring relationships or situational experience. There are, of course, endorsements in supervision and administration, but nothing in those is really geared at teachers who aren't planning to become administrators. Perhaps this sort of on-the-job training was adequate in the past, but such a haphazard approach to training teacher leaders may not suffice for leadership in the new age of educational accountability. There are thousands of young teachers hungry for opportunities to lead, but the field of education will soon be bereft of mature role models for mentoring them as thousands more teachers retire. Moreover, the situations to share in decision making and lead their colleagues in instructional pursuits are becoming far more complex, demanding more maturity, vision, and expertise than can be reasonably expected of novice teachers, no matter how pedagogically astute they are. The nature of school governance will depend more heavily than ever before on the leadership of teachers as their increasingly inexperienced principals, who are themselves in need of mentorship, assume the awesome responsibilities of their retiring predecessors. Finally, if the field of education is to attract the best candidates and then keep them, empowerment of teachers is essential, especially in an era of hyper-scrutiny by politicians and the public.

Context of the Inquiry

The purpose of this chapter is to examine the existing literature related to teacher leadership with specific emphasis on the training of teacher leaders. The guiding questions for this review are these: What kind of training do teacher leaders need and how best might it be delivered? To provide background and a thorough understanding of the nature of school leadership the following topics are explored: (a) the current context for teacher leadership; (b) the background and evolution of teacher leadership; and (c) the theoretical conceptualizations of teacher leadership. The latter includes a focus on the relationship between principals and teacher leaders, servant leadership, situational leadership, and the human element in transforming schools. In the following chapter, 10 research studies are analyzed and synthesized and the methodology and implications of each study are discussed.

Following this summary of research studies, future research relative to teacher leadership training and professional development is considered. The need is pressing in the school district included in this study as it embarks on a teacher leadership initiative. Already, lead teachers have

been formally identified at each high school and promised a stipend for their extra efforts in becoming instructional leaders among their peers. This lead teacher program is scheduled to expand the identification of teachers at the middle and elementary schools. As is so often the case with many educational ventures, though, most of these individuals have received no standardized job description and certainly no formalized training. Thus, an interest in this topic may have a very practical application for this school district that will enrich its lead teacher program.

Research Questions

The primary question guiding this research is as follows: How do teacher leaders describe their preparedness to assume leadership roles and their continuing growth in leadership skill? Subordinate questions include the following: (a) What knowledge, skills, and dispositions do practicing teacher leaders say they need, but don't necessarily have, in order to help their colleagues and students be more productive? (b) How do these needs vary among elementary, middle, and high school teacher leaders? (c) How do these needs vary among specific content-area teacher leaders (beyond the demands of subject area expertise)? (d) How do teacher leaders describe their ongoing professional development and attempts to grow in leadership? Ultimately, the answers to these questions provide insight to the kind of leadership training that might be designed for the next generation of teacher leaders.

Definition of Terms

Teacher leadership and teacher leaders are not easily defined; rather they are often simply recognized when they are in operation. Sometimes they are defined by what they are not instead of what they are. And at other times their identity is tied entirely to where they are found. Frameworks attempt to catalogue the dimensions and features associated with teacher leadership, and profiles detail professional behaviors, as well as personal characteristics and interpersonal skills of teachers exercising leadership. However, concise definitions elude capture.

Teacher Leadership

Teacher leadership is sometimes nebulous; it is not easily articulated nor succinctly described. Sometimes it is more clearly defined by its antithesis.

What it is not. To begin with, leadership by teachers is not steeped in the definitions and rhetoric associated with traditional leadership. Although it calls for teachers to be empowered, it is not "teacher power," as the Task Force on Teacher Leadership reports (2001, p. 4); and

whereas it may be facilitated, it is not "bestowed" (p. 20). Indeed, teacher leaders earn the moniker and are, therefore, not generally self-conscious about their leadership. According to Snell and Swanson (2000, p. 8), few teacher leaders are even cognizant of a desire to lead and "just do" what needs to be done. Consequently, any influence they may wield has nothing to do with reward and coercive or legitimate power; rather they are seen as experts and trusted role models by their peers (Gehrke & Romerdahl, (1997). Because relationships are the base from which teacher leaders operate, their leadership is not restricted to the efficacy of one person or confined to one process (Donaldson, 2001). These relationships extend to principals, as well as the wider school community, but principals are definitely foremost in defining the concept of teacher leadership within their own buildings. Simply enlisting the help of a teacher in attending to the daily administrivia of school governance or the burden of paperwork is not teacher leadership (Cohen, 2002); nor is inviting teachers to vote on changing a policy or practice or to serve on a committee to make decisions about everyone else (Daniels, Bizar, & Zemelman, 2001). In summary, "gaining power only to maintain the status quo" is most certainly not teacher leadership (Daniels, Bizar, & Zemelman, 2001, p. 81).

Where to find it. So what is teacher leadership? The literature suggests that defining teacher leadership can only be done within the context of site and situation. Blase and Kirby (1992) speak of the need for principals to develop both formal and informal structures that negate the constraints of the school bureaucracy. Our schools must become more like "professional communities" as described by the Task force on Teacher Leadership (2001, p. 4), because communities are synonymous with mutual support, shared goals, and pooled resources. In these schools that are communal as well as professional organizations, teacher leadership occurs in four general categories: classrooms, professional development settings, instructional programs, and daily tasks. Collaboration, participative decision making, on-going learning, and reflection – these are the settings where teacher leaders flourish (Snell & Swanson, 2000). These are also the environments that encourage roving leadership (De Pree, 1997; Clarke, Sanborn, Aiken, Cornell, Goodman & Hess, 1998; Glickman, 2002). In schools, roving leadership is characterized by teachers who "share ownership of a problem . . . take possession of a situation" (De Pree, 1997, p. 47). This is a leadership model that assumes that the principal recognizes that the teacher leader (roving leader) has the requisite skills and knowledge to address a situation at a particular time with perhaps more expertise and sensitivity than the principal. Thus, teacher

leadership may manifest itself in a variety of structures and situations thereby complicating a definition of limited proportions and simple explanations.

Dimensions, frameworks, and features. The complex nature of teacher leadership might even be described as messy. Understandably, articulating this messiness has proved difficult even for the experts who often resort to the use of tidy phrasing such as "shared governance" (Blase & Blase, 1994) or "situational mastery" (Goldberg, 2001, p. 63) to give form and function to a concept that is difficult to define. After all, sharing governance may involve myriad decision-making opportunities from serving on the school improvement team to dropping advice into the suggestion box in the front office. And situational mastery may entail exhibiting expertise as a grade-level leader or a math specialist. Consequently, more comprehensive frameworks for discussing teacher leadership have been proposed.

For example, Lambert (1998) speaks of teacher leadership in terms of five associated features:

(1) broad-based, skillful participation in the work of leadership,
(2) inquiry-based use of information to inform decisions and practice,
(3) roles and responsibilities that reflect broad involvement and collaboration,
(4) reflective practice and innovation as norms, and
(5) high student achievement (pp. 33-35).

This framework assumes that teacher leadership is pervasive, interconnected, and interwoven in the fabric of daily school life. Teachers assume responsibility not only for their own classrooms but also for the total school culture; and that involvement demands that they participate in reading, researching, and reflecting on their own practices, as well as whatever will make their entire school more effective and all students more successful.

Similarly, Donaldson (2001, p.7) suggests that teacher leadership is comprised of three dimensions: (1) "relational," or fostering mutual trust and influence; (2) "purposive," or merging individual commitment with organizational mission; and (3) "action-in-common," or sharing beliefs, experiences, and actions to accomplish more. These features of teacher leadership complement Lambert's (1998) framework by putting the emphasis on relationships forged for the mutual benefit of individual and school community. The literature is replete with such structures that attempt to encompass the unwieldy topic of teacher leadership.

Teacher Leaders

Naturally, a single depiction of the teacher leader has been elusive, especially when one considers Lambert's (1998) admonition that leadership and leader are not the same and that everyone has the potential and right to work as a leader. Likewise, Glanz (2002) asserts that (1) everyone is capable of leading to some degree at some time; (2) all leaders are different; (3) there is no one best way of leading; and (4) effective leadership is contextual. The conclusion seems to be that unlike the post of principal, teacher leadership is not limited to one person in one particular role. Indeed, teacher leaders are not restricted in terms of number per building, nor are they designated by formal job description. Their leadership is defined by the situation, problem, or objective and the skills needed for addressing, resolving, or meeting each. Thus, there is no one specific profile that fits every type of teacher leader, nor is there an all-purpose definition of the teacher leader with which only a few teachers can identify. Nevertheless, there are some core traits that are frequently associated with individuals who are identified as teacher leaders.

Professional traits. Typically, teacher leaders are experienced educators having taught on several grade levels and having developed content expertise; they are learners themselves and often hold advanced degrees; they have a global view of education and are able to see the impact of their work beyond their immediate classroom; they are organized; and they are active outside the school in community and political organizations (Lieberman, 1987). The descriptors "well rounded" and "mature" come to mind and help to validate teacher leaders' possession of what Lieberman calls a "well-developed ideological stance" (p. 402). They are able to articulate and defend this belief system born of experience and broad perspective partially because they have extemporaneously exercised the skills of explanation, discussion, persuasion and debate in front of a demanding student audience every day (Dozier, 2001). This day-to-day interaction with students helps them understand their classroom colleagues' point of view, and they are more readily seen as legitimate leaders by their peers (Lieberman, 1987).

Personal traits. Colleagues and observers often speak of teacher leaders in more personal terms, such as those listed by Lieberman (1987): lively, positive, outgoing, and good listeners. Dozier (2001, p. 8) adds the word "flexible" to the list of adjectives, while Goldberg (2001) insists that courage, perseverance, and patience are essential qualities of teacher leaders.
In truth, teacher leaders often describe themselves as helpers or "assisters," as Lieberman calls them (1987, p. 402). Such a depiction fits well with the concept of "servant leadership"

(Greenleaf, 1977; De Pree, 1997), which Gehrke and Romerdahl also (1997) apply to the role of the teacher leader. Teacher leaders begin their careers hoping to serve others, their students and school community, and then grow into leaders of other teachers as a result of their expertise, unwavering commitment and generosity of spirit. Eventually their leadership is encouraged and followed because they are trusted and respected as servants first. Their reward is the knowledge that their followership –colleagues and community –has likewise grown in wisdom, knowledge, skill, and the desire ultimately to become servant leaders themselves.

Interpersonal traits. Both assisting and serving involve the use of strong interpersonal skills. They are also action skills, which appear in the literature as collaborating, participating, sharing, and motivating, especially as they relate to teachers as agents of change and reform (McCay, Flora, Hamilton, & Riley, 2001). Exercised judiciously, these skills build mutual trust, respect, rapport, and empower teachers to walk in the world of the principal as well as that of the teacher (Lieberman, 1987).

Roles. Teacher leaders are most easily identified by the roles they assume. Significant attention has been paid to the mentoring done by teacher leaders, and Lord and Miller (2000) describe a variety of mentoring roles associated with teacher leaders: trainers of other teachers, specialists, resource teachers, and peer coaches. Gehrke and Romerdahl (1997) expand the list of jobs that teacher leaders assume to include department chairs, team leaders, union representatives, council members, teacher-business liaisons, community-volunteer coordinators, and collaborative service facilitators. Action researcher is yet another informal title attributed to the teacher leader (Glickman, 2002). Glickman (2002) also elaborates the role of mentor to include teacher leaders who engage in supervision of student teachers or act as a critical friend to their peers. Critical friends are good listeners and incisive questioners who prod colleagues to reflect, clarify their thinking, and consider the impact of their practices. Clarke, Sanborn, Aiken, Cornell, Goodman, and Hess (1998) subscribe to the use of critical friends organized in small teams that include a peer coaching component for solving problems or addressing other instructional issues. Whatever their role, teacher leaders are most often seen helping, linking, and making decisions (Gehrke & Romerdahl, 1987).

Current Issues Relating to Teacher Leadership

While specific definitions of teacher leadership may evade capture, the reasons to cultivate more teacher leaders are clear and cogent. Teacher and principal shortages, alternative

licensure or inadequate preparation, perilous assessment and accreditation requirements, and the threat to "leave no child behind" or in the hands of not-so-"highly qualified teachers" (U. S. Department of Education, 2003) – all have forced the governance of schools into the hands of numerous shareholders. One of these shareholders is the classroom teacher who must adapt to new roles and shoulder expanding responsibilities.

Indeed, the US Department of Education (2003) in its report on teacher quality is emphatic in its promotion of preservice and inservice training so that teacher effectiveness will result in increased student success in the context of standards-based assessment. Such alignment between teacher training and school accountability might be more easily accomplished with the reliance on teachers who are trained to be highly-qualified leaders (as well as teachers) among their peers.

Attracting and Retaining Teachers

According to the Report of the Task Force on Teacher Leadership (2001), 2.2 million teachers will be exiting the profession during the current decade. Compounding this anticipated exodus, more than one third of new hires will leave within their first three years of teaching and 46% will be gone within five years (National Commission for Teaching and America's Future, 1996). The data are staggering and mean that nearly two thirds of the entire teaching force will be replaced in the next decade (Barth, 2001). Even if teaching could attract candidates with a lure of high salaries, reasonable work hours, political support and community respect, plus the promise of intrinsic rewards that outnumber the daily challenges, there would still be a dearth of qualified and eager prospects to fill the jobs. Desperate in some cases to merely staff classrooms, teacher preparation has fallen victim to shortcuts and circumvention. In 1996 more than 50,000 individuals entered teaching with little or no training and holding substandard or emergency credentials (Grossman, 2003). States are now rushing to provide teachers with alternative licenses and fast-track preparation programs that focus only on communication skills and content knowledge (Grossman, 2003). Two questions loom before school leaders: How will they fill the gaps in preparation for these alternatively-trained new recruits? How can they equip even the prepared candidates with the skills to survive the challenges of the first few years and actually want to make teaching a life-long career?

A ready answer to the first question presents itself: A well-trained corps of mentors is crucial to the success of those entering the profession without the benefit of adequate teacher

training. Mentoring has long been the role most associated with teacher leaders. Research indicates that mentors cut the dropout rate of teachers from approximately 50% to 15% during the first five years of teaching (Barth, 2001). Not only do mentors play an important role in retaining teachers, but according to David Berliner, they also attract teacher candidates (Scherer, 2001) with the promise of support in those first trying years of employment. "Does your system have a mentoring program?" is a commonly asked question by applicants in employment interviews.

Furthermore, providing opportunities for teachers to grow in new ways and take on more responsibilities for shared governance of the school will add variety and breadth to their careers, reduce their isolation, increase their professionalism, and make them "owners and investors" rather than "mere tenants" of their schools (Barth, 2001, p.449). With the possibility of career ladders and rewards for their leadership, teachers' professional lives will be enriched and their status elevated in the public eye (Shen, 1997; Scherer, 2001). These may be powerful motivators for teachers to remain in public education and become mentors and leaders for the next generation of teachers who are sorely in need of their help.

Principals Need Help

Not only do teachers need help from their peer leaders, but so do principals. Just as there is a shortage of well-prepared teachers, there is also a shortage of principals. The US Bureau of Labor Statistics is projecting a possible 20% increase in principal vacancies in the next few years (Copland, 2001). As districts must go outside their boundaries to attract administrators, and as new principals come to the job with fewer years of teaching experience, they might rely on the leadership and wisdom of the teachers in their buildings. Administrator shortages and lack of experience are, however, only two factors that beg for teacher leadership. Copland (2001) dispels the myth of the superprincipal, a being of epic proportions who can juggle myriad tasks while simultaneously making life-altering decisions with the confidence of a superhero. In fact, today's principals need all the help they can get in an era of constant public scrutiny and accountability. Hoerr (1996) concurs that the demands on principals make it impossible to do the job alone. They are overworked, vulnerable, and far too dependent on outside solutions for reform (Fullan, 1996). Fortunately, there are experts within their own walls if they will only avail themselves of their leadership.

Even school leaders themselves are approaching the topic of leadership reform by establishing guiding principles that acknowledge the "changing role of the school leader," who must now collaborate with all members of the school community granting them "access, opportunity, and empowerment" (Council of Chief State School Officers, 1996, p.7).

Community Support for Enhancement of the Teacher's Role in Leadership

Undoubtedly, there is a need for teachers to share the leadership responsibilities in the school. Even the wider community is calling for new roles for teachers. A survey summarized in Sergiovanni's *The Lifeworld of Leadership* (2000) reveals that most Americans want community for their schools, and they trust the teachers who work in their schools to make reform efforts work and to make school commonwealth a goal.

Realizing that they too have a stake in promoting teacher leadership, the business community advocates teachers' being given opportunities for leadership as mentors, peer evaluators, and university adjunct faculty; they also advocate raises in pay, special certifications, and improved preparation and professional training. These opportunities and rewards will raise the stature of the teaching profession. The worlds of business and education have much in common, and shared management is a model that the business community could share with school systems as well (Task Force on Teacher Leadership, 2001).

Finally, higher education is demonstrating increased interest in teacher leadership programs. More than twenty years ago Lieberman (1987) chided colleges and universities for being slow to get involved in studying "context as a critical variable" for teacher leadership by initiating collaborative research and cooperative relationships to help schools become their own data collectors (p. 403). Today in the age of assessment and accountability this admonition seems prophetic. Although slow to react, some institutions of higher learning are creating courses and special certificate programs. Some are also working collaboratively with public schools to develop clinical faculty positions and adjunct positions to use and expand the expertise of teacher leaders.

Background of Teacher Leadership

Teacher leadership is by no means a new concept. In fact, one-room schools run by teachers are the historical predecessors of today's site-based management in schools. In the 1980's renewed interest in the concept of shared decision-making to address school governance brought teacher leadership back for discussion. Ironically, district bureaucracies had become

unresponsive to their own mission – instruction. In response, between 1986 and 1990 approximately one third of all school districts in the United States had adopted some form of site-based management, and at least five states (Colorado, Florida, Kentucky, North Carolina, and Texas) had actually legislated some type of school-based participatory decision making (School-based management, 2002).

Unfortunately, in 1990-91 based on data from the Schools and Staffing Survey, no more than 39% of teachers believed they had a great deal of control over discipline policies, establishing curriculum, determining inservice programs, or ability grouping of students (Anderson, 1994). Clearly, site-based management as practiced was not necessarily the path to teacher empowerment or leadership. More than a decade later, not much has changed. According to the Task Force on Teacher Leadership (2001, p. 2),

> The infinite potential the nation's teachers possess for sharing their hard-earned knowledge and wisdom with the players in education's decision-making circles – or even for becoming part of these circles – remains largely unexploited. There are a growing number of glittering exceptions, but they do not add up to much in American public education's universe of 46-plus million students, 15,000-odd school districts, and 100,000-plus schools. If they constitute a trend toward recognizing the teacher as leader, it is surely a slowly developing one.

Theoretical Conceptualizations of and Commentary on Teacher Leadership

Clearly, there exists a need not only for teacher leadership, but also for some form of structured training for them that does not depend on chance or serendipitous opportunities. An increasingly younger and less-experienced teacher population, the complexity of the principalship, the need to retain veteran teachers, community support, the lack of success in producing the most effective teacher leadership under models such as site-based management – all present convincing arguments for developing teacher leader training. The theoretical foundations for a study of teacher leaders and their professional development derive strength from the research and literature devoted to the following: (1) the role that principals and school culture play in support of teachers who lead, (2) situational leadership as venues for discovering and developing teacher leaders, (3) the concept of servant leadership as an especially appropriate description of the type of leadership exercised by teachers who lead, and (4) the need, above all,

to put people before structures when effecting positive change. Brief discussions of these topics, along with some available models of professional development for teacher leaders, follow.

Principals: The Support They Offer and the School Culture They Create

Educational leadership is generally defined from the perspective of principals or other district administrators and described in three ways: types of leadership, personal characteristics associated with effective leaders, and skills and strategies employed by effective leaders. Leadership has been catalogued as constructivist (Lambert, 1995), distributed (Evans, 1996; Neuman & Simmons, 2000), transformational (DeBlois, 2000; Johnson, 1996; Pielstick, 1998), authentic (Combs, Wiser & Whitaker, 1999; Evans, 1996), transactional and reciprocal (Lucas, 1999), as well as managerial, collaborative, and political (Johnson, 1996). Scores of adjectives describe these leaders as anything from persuasive and passionate to reflective and responsible, from principled and persistent to self-confident and supportive, and from energetic and ethical to courageous and charismatic. No matter what the theoretical construct, effective leadership depends on an understanding of the school as a mutually interdependent and respectful community operating within a positive and productive school culture. This is, of course, also the environment that promotes teacher leadership.

Community

The concept of school community is, perhaps, best explained by Sergiovanni (1999) as interdependency among all adults and students who share fellowship in a place where human capital, social and academic, is developed. Investment in human capital is not restricted to students though; all the resources in the world would be poorly used in the hands of students under the supervision of untrained, unaware, or uninterested teachers. Thus, investing in teachers via training and professional development pays a higher dividend for the school community. Key members of this community are teacher leaders who are critical in helping a principal to achieve what Goodlad calls a "critical mass" of support so necessary to constructing community inside and outside the school walls (Goldberg, 2000, p.85).

Such a community operates under the principles that leadership and leader are not the same, that leading is a shared endeavor, that leadership requires redistribution of power and authority, and that everyone has the potential and right to work as a leader (Lambert, 1998). So an effective school is actually a community of leaders, not a principal and his or her staff. And the principal who promotes teacher leadership realizes that power shared is power multiplied

(Hoerr, 1996) and that sharing the vision through distributed leadership means more than merely communicating it (Neuman & Simmons, 2000; Hargreaves & Fink, 2003). The principal in a mutually supportive community understands the value of relationship building and commitment to purpose and common action. When challenges arise in a true school community, they may be faced together with the probability of success for all members of the community (Donaldson, 2001). But this commitment to communal strength and action depends on sustainability of leadership across time (Hargreaves & Fink, 2003), another reason to develop a corps of teacher leaders within a building who can perpetuate the school mission even when the principal moves on.

Culture

A sense of community is paramount to the culture of an effective school and to the nurture of teacher leaders. But defining culture is almost as difficult as defining teacher leadership, although one indicator of a positive school culture is the satisfaction of teachers in the school. This satisfaction is undoubtedly attached to their feelings of empowerment and participation in school governance. According to the literature and various testimonials, a principal is the pivotal player in developing a culture that spawns and nurtures teacher leaders.

Again, Sergiovanni (1992) advocates the building of school culture on the foundation of collegiality and community where the principal develops a followership first and then leadership. The principal motivates and inspires by modeling his or her own stewardship, and a virtuous school results from this leadership. The school develops not only a positive culture that supports teachers but also a positive character (2000). This character is predicated on the shared values and expectations held by the people who operate within a community, not just a building. The school community is inhabited by people (students, teachers, administrators, parents), who have strengths, talents, and needs and who share a responsibility to each other. Sharing power in a school community is fundamental, and leadership is really less about the principal and more about the participants.

But mundane managerial tasks and everyday operational challenges underlie even the loftiest leadership. Although the ability to inspire via charisma is a valuable trait, even the best principals sometimes err. However, if they have developed a caring community of leaders and learners, they will be forgiven more easily if that community has seen them operating with integrity, commitment, and persistence on a daily basis (DeBlois, 2000). This is a lesson for

teacher leaders, particularly if they are willing to take risks in order to reach instructional goals. Mentoring leadership also extends to talking honestly, engaging in reflective practice, showing courage and conviction, and sustaining passion and a sense of urgency (Hibert, 2000).

In addition to acting as a role model, a principal must create a culture that exudes clarity of shared mission and structure for realizing that mission (Azzara, 2000), while it simultaneously encourages autonomy and innovation (Blase & Blase, 1994). This balancing act will produce partnerships marked by maturity, trust, respect and mutual support between teacher leaders and principals (Gehrke & Romerdahl, 1997).

Situational Leadership

The culture of a school that subscribes to shared governance and teacher leadership is a culture that promotes the involvement of a broad range of participants in sundry leadership situations. Some methods for broadening leadership include forming study groups, using action research, and initiating problem-based learning (Goldberg, 2001). Teachers who come together in these ways are empowered to make decisions and take action based on their own research to solve problems, initiate reform, develop and select resources, and implement programs. As a result, the school leadership is distributed among its shareholders, not held tightly in one office. Providing these kinds of opportunities is also training for future leaders and ensures continuity of vision and direction should the current principal or teacher leaders leave. With experience, the savvy principal becomes a master of the situation by making, accommodating, personalizing, and expanding the fit between teacher leader and situation (Goldberg, 2001). Not only does the current culture benefit from customized leadership, but recruiting and hiring new teachers might also include a search for potential leadership. Interview questions could be crafted to determine potential leadership qualities, in addition to a comfortable workplace match. Furthermore, considering their abilities, styles, strengths, and weaknesses is another way for neophytes and veteran teacher leaders to engage in self-reflection.

Glanz (2002) has expanded this theme of contextual leadership by developing a profile for teachers and administrators to identify their leadership styles. Using this self-knowledge, administrators and teacher leaders could make choices about future leadership ventures and build their own relationships on recognition of each other's leadership style. Even members of collaborative teams, such as those needed for action research and problem solving, could be selected to complement each other in skill, talent and leadership. After all, climate and culture

are an amalgamation of style – in teaching, learning, and leadership. And it is incumbent upon a good leader to understand the talents and strengths of those with whom they work (De Pree, 1997).

Akin to situational leadership is roving leadership, a concept described by De Pree (1997) from the corporate world. Roving leaders have been enabled by hierarchical leaders to identify a problem, propose solutions, and apply them. Exemplary leaders recognize that interdependence and inclusion are necessary and that workers want to feel needed, involved, cared about, and to have a "piece of the action" (p. 63). Thus, their leaders owe them space, opportunities to serve, and challenges. Teacher leaders are often considered roving leaders who identify a need, deficit, or problem and are empowered to address it. Schools, like corporations, should be in the business of creating legacies; and according to De Pree, "A legacy lives in the actions of many people" (1997, p. 173). Teacher leaders can help principals leave legacies.

Servant Leadership

In 1977, Greenleaf offered a scholarly exploration of the nature of legitimate power in *Servant Leadership.* Even though the book's target audience was not educators, there is much that applies in terms of educational leadership and teacher leaders in particular. Greenleaf defines a servant leader as one who wants to serve because of a desire to fulfill the needs of others. Then he or she gauges success based on whether those served have grown in wisdom, freedom, autonomy, and a desire also to serve others, especially the least privileged. Only leaders who are trusted and have proven themselves as servants first will be freely followed. Those in their midst have seen them persevere and refine their efforts, be willing to take risks rather than preserve the status quo, and show empathy and tolerance for others. Servant leaders are good listeners with a sharp intuition and earn the trust of others. They do not wield power through coercion; their power is organic and long lasting.

De Pree translated this concept of servant leadership for a community and institutional context in *Leadership is an Art* (1987), elaborated metaphorically on it in *Leadership Jazz* (1992), and applied it specifically to the corporate world in *Leading Without Power* (1997). This broad but concrete treatment of servant leadership echoes the Greenleaf premises. For example, De Pree (1997, p.12) avers that effective leadership appears in the followers when there are signs that they are reaching their potential, learning, serving others, achieving, "changing with grace," and managing conflict. They realize that risks are unavoidable and that sometimes the only way

to improvement is through risk-taking. However, servant leaders are followed because they are trusted and respected and committed to personal integrity and organizational loyalty (1987). It is "elegant" leadership (De Pree, 1997, p.136) that, like the leader of a jazz band, "combines the unpredictability of the future with the gifts of individuals" (1992, p. 9) while never losing sight of the whole performance.

Gehrke and Romerdahl bring the philosophy of Greenleaf (1977) and De Pree (1982; 1992; 1997) to the level of practical application in *Teacher Leaders* (1997). They see teacher leaders in helping and linking roles that require them to (1) go in advance of their colleagues, learning and modeling new skills, (2) place themselves at the head of the movement when others are ready to be led, (3) conduct by argument rather than force of authority, and (4) use gentle persuasion when necessary. Like Greenleaf and De Pree, they discuss the importance of culture in developing teacher leaders as well as in inhibiting them. The very employment structure and climate that may offer autonomy, equality, and privacy to practitioners (the classroom) inevitably impedes teacher leadership. These are environments that are not conducive to collaboration, group processing and problem solving, risk taking, and shared school governance. Paradoxically, teacher leaders who step out of the comfort zone of autonomy, equality, and privacy experience the stress attendant to leadership as their jobs become more complex, their time inadequate to serve, and conflicts between professional and personal life mount.

Focusing on People, not Structures

According to Robert Evans (1996), leadership must always keep people, not structures, at its heart. *In The Human Side of Change,* he sarcastically summarizes the "life cycle for leadership theory" (p. 146): developed by political scientists or business leaders, implemented by the corporate world, later adopted by education even as it is declining in popularity among corporate leadership, and finally misapplied in education circles until it eventually dies a slow death. Obviously, the failure of this leadership life cycle is a failure of adopting a structure that is not a fit for the context.

Even in schools, principals are often forced to adopt the successful practices of other schools even though their conditions may be very different. Instead, schools that are focused on transforming rely on "purposing" and followership and rest on two sources of authority: professional and moral (Evans, 1996, p.172). Professional educators work as partners making decisions together in governance structures that allow decisions to be made at the levels where

they will be implemented. This confidence encourages decision makers – teachers and administrators – to assume responsibility for establishing high standards and then working on their own growth to meet those standards. Professional authority realizes that scientific knowledge "informs practice but does not dictate it" (p.173); moral authority emphasizes the importance of shared values and interdependence. In other words, when the school community strives for excellence, it works together because it believes in a mission, a set of shared values that requires personal and professional investment. Establishing a set of beliefs and committing to them not only gives personal meaning to the school as an organization, it also motivates workplace competence. Teachers who share in the direction, goals, and objectives of the school want to participate in continual training and professional development so that they can see those goals achieved.

Fullan (2002) agrees that technique must operate in tandem with beliefs, and he identified five conceptions: moral purpose, understanding change, relationship building, knowledge generation and sharing, and coherence building. The blending of these conceptions breeds a culture of trust where teacher leaders learn about school governance from authentic leaders (Evans, 1996; Terry, 2003). Authentic leaders are person centered and operate under open systems of thinking (Combs, Miser, & Whitaker, 1999) where contributions to leadership are welcomed and encouraged. Their schools are more than buildings occupied by students and staff; they are true communities.

CHAPTER 2: REVIEW OF THE LITERATURE

Analysis of Research Studies on Teacher Leadership

The following chapter presents selected studies of teacher leadership. First, the rationale for including studies for review is discussed. Next, a brief synthesis of the studies' purposes, methodologies, and samples is provided as an overview. Then the 10 studies are presented and critically analyzed. The review addresses three general conceptual areas: (a) the principal as a trainer of teacher leaders (b) the skills and knowledge necessary to be effective teacher leaders, and (c) partnerships for teacher leader professional development.

Research Studies Included for Review

Some parameters for selection of studies for the review were set prior to searching the literature. First, only studies that conducted research involving teacher leaders in public school settings K-12 were included. An attempt was made to locate studies that would represent a span of grade levels or schools (elementary, middle, and high), as well as a variety of subject matters or school reform initiatives. Of principal interest were studies that contained specific references to professional development and training of teacher leaders.

Second, studies were limited to research published since 1992. Teacher leadership has been a popular topic since the 1980's in literature related to school reform and site-based management, but as a result of the standards and accountability movement that began its ascent in the 1990's, teacher leadership deserves another look. The No Child Left Behind legislation with its mandate for "highly qualified" teachers has created a contextually different rationale for teacher leaders (U. S. Department of Education, 2003). Thus, a look at more recent studies seemed appropriate.

A discussion of the studies includes the following elements: (a) author(s) and year of publication; (b) methodology and sample used; (c) major findings of each study; and (d) key points in the discussion of each study.

An Overview of the Studies

Researchers studied various aspects of the preparation and training of teacher leaders both directly and indirectly. Some looked at the principal's influence on the promotion (Blase & Kirby, 1992) or discouragement (Zepeda & Mayers, 2002) of teacher leadership. In a similar vein, one study sought to identify the facilitators and obstacles to teacher leadership (Silva, Gimbert, & Nolan, 2000). Two studies made comparisons with existing research: One compared

the professional activities of teacher leaders with what current studies indicate are the behaviors and traits of teacher leaders (Lemlech & Hertzog, 1998), and the other assessed current teacher leader preparation and behaviors by comparing selected teacher leader traits with those of the general population of public school teachers (Dils, 2001). A profile to identify potential teacher leaders was the product of another study (Krisko, 2001), while another developed a framework for the knowledge, skills, and behaviors associated with teacher leadership (Snell & Swanson, 2000). A definition of teacher leadership from the perspective of beginning teachers was the focus of a study by Suranna and Moss (2002), and the skills needed by teacher leaders and how they developed them were the findings of a study by Swanson (2000). Finally, a study emphasizing a college and public school partnership involving clinical faculty revealed the professional development support and opportunities available for these teacher leaders (Wetig, 2002).

Methodologies. The predominant methodology used in these studies was the case study – single (Zepeda & Mayers, 2002), and multicase (Lemlech & Hertzog, 1998; Silva, Gimbert, & Nolan, 2000; Swanson, 2000; Krisko, 2001; Suranna & Moss, 2002; Wetig, 2002). Two studies involved data collection via surveys: one an open-ended questionnaire yielding data coded according to the principles of comparative analysis (Blase & Kirby, 1992) and the other a quantitative study of data garnered from a survey administered via the Internet (Dils, 2001).

Samples. Studies collected data from a wide cross-section of teachers including self-professed teacher leaders (Dils, 2001) and those identified by others as teacher leaders. The research encompassed a range of experience from beginning teachers with four or fewer years of experience (Lemlech & Hertzog, 1998; Suranna & Moss, 2002) to veteran teachers (Silva, Gimbert, & Nolan, 2000; Swanson, 2000; Dils, 2001). Studies also focused on elementary teachers (Suranna & Moss, 2002; Wetig, 2002), and middle school teachers (Snell & Swanson, 2000; Swanson, 2000; Zepeda & Mayers, 2002), as well as studies of teachers from a variety of grades and levels (Blase & Kirby, 1992; Silva, Gimbert, & Nolan, 2000; Dils, 2001; Krisko, 2001).

Teacher leaders and their professional development and training

A review of the literature on teacher leadership gives voluminous attention to the building-level administrator as potentially the most influential factor in the promotion and development of teacher leadership in a school. The implementation of site-based management

and the concern of principals to reach standards for school accountability have made this topic crucial to school reform and effectiveness. The following section analyzes studies relative to the role the principal plays in encouraging and developing teacher leaders.

The principal as a trainer of teacher leaders. Principals themselves rarely conduct professional development or training sessions and workshops for teacher leaders. Rather they teach by example and by institution of informal and formal structures that provide opportunities for teachers to learn leadership. Blase and Kirby (1992) illustrated the importance of the principal in developing teacher leadership by studying the responses of more than 1,200 respondents to an open-ended questionnaire, the Inventory of Strategies Used by Principals to Influence Teachers. Participants were full-time public school teachers taking courses in five on- and off-campus centers of universities located in three states representing a southeastern, northeastern, and northwestern region of the country. The responses drew from a diverse sample of males and females with a range of degrees from bachelor's to doctorate; tenured and nontenured teachers from rural, suburban and urban locations; and elementary, junior high/middle, and high school teachers with a variety of personal situations (married, single, or divorced). From the more than 1,200 respondents, only the 836 positive respondents' data were used. Since the researchers were interested in what effective principals do to bring out the best in teachers, they chose not to discuss the data from teachers who described their principals as relatively ineffective and closed. The average age was 37 years, and the average teaching experience was 12 years for these respondents. They had spent a mean number of four years with their principals, who numbered 339 females and 497 males. These principals were described by the respondents as open, effective, and promoters of participatory leadership; teachers whose negative responses were not used in the study described their principals as relatively closed and ineffective. Since the sample was roughly consistent with the national distribution of teachers in terms of gender, age, degrees earned, and marital status, the findings were credible.

Key issues in the study included opportunities to lead, school climate, and the personality of principals and put principals front and center in the discussion of mentoring teacher leaders. These are recurring themes in the literature and subsequent studies. Blase and Kirby (1992) found that formal structures encouraged more faculty involvement in school governance, and principals who used them were perceived as more effective. These were principals who understood the difference between professional organizations and bureaucracies and the balance

between involvement and autonomy. They were individuals whose praise and expectations of staff created a climate for leadership. Manifested by their honesty, optimism, and consideration of others, their leadership was described as moral and further evidence that leadership must supersede a title; it must be earned.

Depicting an antithesis to the Blase and Kirby (1992) study was a case study done by Zepeda and Mayers (2002). Focusing on a four-year instructional lead teacher at a middle school, this study was methodologically quite different, and the results reflected the negative impact that a principal can have on emerging teacher leadership. Data were collected from four semi-structured interviews over a four-month period, field notes, observations, and school district documents. They were analyzed using the constant comparative method and eventually yielded two themes: the restricted and ineffective use of teacher leaders and the trust necessary between principal and teacher leader. Giving voice to the data not used in the Blase and Kirby (1992) research, this study pointed out that principals who do not create structures for leadership dilute the effectiveness of the teacher leader and usurp his or her valuable time that could be used for instructional support. Frequently these are principals who assign administrative duties that they dislike, are too busy to do, and see as unimportant albeit necessary evils. Also, principals who do not respect the advice of the lead teacher destroy not only the pact between them but also the institutional trust involving the entire faculty.

Who are teacher leaders and what skills do they need? Two other studies were similar in their attempts to create parameters for the attributes associated with teacher leaders. One was a profile (Krisko, 2001) representing the knowledge, skills, and behaviors associated with teacher leaders; and the other was a framework of those traits (Snell & Swanson, 2000). Snell and Swanson conducted 10 studies of recognized, urban middle school teachers who had not only been successful classroom teachers in districts engaged in standards-based reform, but they had also demonstrated an ability to motivate and mentor their colleagues. These participants were brought together for two three-day conferences to reflect on their own leadership and how they had developed it. These sessions were followed by interviews and portfolio reviews that included resumes and metaphorical maps of their journeys to leadership. From their study, a conceptual framework for teacher leader qualities developed and included the following qualities: expertise, collaboration, flexibility, reflection, and empowerment. This study more than any other specifically referred to professional development beyond mentoring or opportunities to serve and

stated that professional development opportunities of adequate time and substance are crucial to teacher leader development. Suggested elements of training included formal coursework, pedagogical content knowledge, awareness of developmental stages for student learning, and understanding of purposes for schooling and standards. Training for collaboration would include working with mentors and assuming leadership roles. Reflection skills could be developed by acting as a "critical friend" and participating in professional development that incorporates reflection activities. Snell and Swanson contended that if teacher leaders are given opportunities to gain expertise in their content areas, collaborate, and reflect, their sense of empowerment will grow and they will contribute to needed school reform.

Krisko's (2001) study included the responses of teacher leaders to statements relative to identifiable characteristics of teacher leaders. Garnered during interviews, the responses allowed for elaboration by the participants who were also able to discuss their experiences at various maturation levels in their teacher leadership experience. These responses were then analyzed, organized and classified into thematic categories reflecting pre-college, college/teaching, and teacher leader experiential levels. A percentage of strength was determined at each developmental period. For example, taking risks was assigned a value of 61% at the pre-college level, 82% at the college/teaching level, and 88% at the teacher leader level. Eventually, a profile was developed based on the data that included the following traits: (1) intrapersonal sense, (2) creativity, (3) effectiveness, (4) flexibility, (5) lifelong learner, (6) sense of humor, (7) responsibility, and (8) risk taker. A developmental pattern based on the percentages of strength calculated from participants' responses suggested a gradual maturation of strength in each of these traits from pre-college through teacher leadership. The implications of this study lie in the potential for application of the profile. Krisko suggested that the profile might be used by principals in selecting individuals to serve as leaders or even in hiring new teachers as prospective leaders. These same principals might be reminded of the experts already inside their buildings rather than relying on outside consultants to present professional development. Use of the profile as a self-reflection tool could show teachers their potential as leaders and identify weaknesses that could be addressed in training to prepare them for future leadership. In summary, school reform and effectiveness depend on the school's functioning as a professional democratic learning community, and the profile could serve as a powerful method for identifying and developing teacher leaders.

Partnerships for professional development of teacher leaders. Specific, formal professional development of teacher leaders was addressed in two other studies that detailed college/public school partnerships. Wetig (2002) studied the support and professional development opportunities associated with a college and public school partnership to train clinical faculty. This case study focused on 10 elementary teachers serving as clinical instructors for a two-year period between 1999 and 2001. Initial and follow-up interviews were conducted plus two additional questionnaires; these were supplemented by participant observations and researcher field notes. Findings centered on how the clinical instructors defined and described their roles in leadership terms. They revealed that their roles did change their relationships with their colleagues, but their experiences enhanced their leadership and promoted their appreciation for others in leadership situations. Ultimately, they saw themselves as transformational leaders, although not necessarily formal leaders. The study suggested that a leadership assessment inventory be used to diagnose leadership styles and how those styles might impact interactions with colleagues, as well as clinical faculty's own personal and professional growth.

Wetig concluded that teachers chosen for clinical instructor roles should be articulate, experienced in collaboration, respected by colleagues, and capable of traversing between the worlds of college and school classroom. They should also have a broad professional background and some prior leadership experience. The clinical professional development partnership should include forums for sharing information, conference and coursework opportunities, specialized training related to leadership and mentoring, collaboration and co-teaching with college faculty, summer professional development, and grant writing. This study not only assessed the success of one program, it provided a foundation for the possibilities on which others might be built. Such public school/university linkages could hone the skills of teacher leaders while benefiting instruction for students in public schools and higher education.

Likewise, Suranna and Moss (2002) explored teacher leadership in the context of teacher preparation defining teacher leaders from the point of view of beginning teachers. Nine preservice and three relatively new inservice elementary teachers from a five-year integrated bachelor's and master's teacher preparation program were the participants. Semistructured interviews with student teachers, supervising teachers, administrators, teacher colleagues, deans and college professors were conducted. These data were supplemented by 20 observations in elementary and college classrooms and professional teacher meetings. The perspective of these

less-experienced teachers did not differ from that of teachers in other studies. They described teacher leaders as facilitators, helpers, supporters, change agents, risk takers, mentors, exemplary teachers, and role models.

The most significant feature of this study was the description of the graduate course offered through the leadership department (not the instruction department – it must be noted) of the college partner. It included topics on school culture and climate and teacher leaders as ethical influences in these environments. Considering the age and experience of the study's participants and their ability to define teacher leadership and articulate its benefits and challenges, other districts might do well to emulate such programs. These prospective and newly-practicing teachers understood that teacher leadership was not about self-promotion, a common misconception of less-experienced, less-educated teachers and principals. Instead, they perceived a school's mission to be about empowering staff to empower students.

In the Lemlech and Hertzog study (1998), the participants were similar to those in the Suranno and Moss study (2002) in that they too were relatively inexperienced as teachers and were graduates of a university preparation program at the University of Southern California. Fourteen elementary teachers in their second to fourth years of teaching from six schools in four school districts, along with their principals, completed questionnaires that examined their perspectives on their professional lives. They also participated in interviews about their school and district cultures. Considered good teachers at the end of their student teaching assignments, 13 of the 14 participants had distinguished themselves in ways considered unusual for their limited years of experience, although a strong sense of efficacy, commitment to advanced learning and degrees, and confidence were exhibited by all the participants. The purpose of the study was to better prepare teachers for leadership roles by comparing the data collected with what current research indicates are the behaviors and traits of teacher leaders. The patterns of professional behavior, in addition to the personal and professional qualities associated with teacher leaders in general were essentially the same. The authors concluded from this case study that preservice teacher-leader programs must focus on collaborative behavior, understanding and participating in a professional community, peer coaching, and self-efficacy. Then novice teachers would be prepared to participate fully and effectively in school reform and decision making and to develop into teacher leaders.

Speaking from experience: Veteran teacher leaders. The three remaining studies represent the other end of the experience spectrum. The first is a two-year case study of 10 exemplary teacher leaders who had been deeply involved in district and state standards reform. The participants helped the researcher identify the skills needed for teacher leadership and how they were developed (Swanson, 2000). In this study, Swanson attempted to answer the question: What is the difference between an excellent teacher and a teacher leader? This question was answered in the following way: Teacher leaders are distinguished from expert teachers by their pedagogical and content expertise, flexibility, collaborative skills, and self-reflection. Moreover, the study revealed that professional development played a significant role in nurturing teacher leaders, for it was critical in providing opportunities for networking, engaging in collaborative relationships with peers, and optimizing reflective practice. But rigorous learning opportunities that nourish intellectual interests are key; teachers must be treated as scholars in a professional learning community. Mentors and respected colleagues offered encouragement and guidance in attending to the human side of professional relationships. Unfortunately, many teachers reported that their paths to leadership had been the result of somewhat haphazard and accidental journeys.

Silva, Gimbert, and Nolan's research (2000) repeated some of these themes in their case study of three teacher leaders from a progressive school district noted for its professional development opportunities. The participants were chosen using a unique case selection procedure: They had taught at least 10 years, were nominated by at least three peers, saw themselves primarily as classroom teachers, but had served in various leadership roles outside their classrooms. Nominations were solicited from elementary and high school teachers via telephone interviews. Assured anonymity, each teacher leader participated in a semistructured, tape-recorded interview of 90 to 120 minutes and responded to the same questions from three basic categories: a biographical description of the teacher as a professional, his or her experiences as a leader in the school district, and the possibilities for teacher leadership in the district. Providing triangulation, a colleague unfamiliar with the participants later read and analyzed the transcribed interviews. Eventually, themes and categories emerged from multiple readings of the data to provide a definition of teacher leadership and to identify the obstacles and facilitators associated with teacher leadership. These teacher leaders defined their leadership in much the same way as those in other studies.

The significant difference in this study was the identification of phases in the evolution of teacher leadership. The first phase was described as a focus on the smooth and efficient operation of the system, definitely not instructional leadership; then the focus shifted to the recognition of the pedagogical expertise of some teachers who left the classroom to lead; now the emphasis has moved toward everyday collaboration and collegial problem solving inherent in the work of schools. In other words, every teacher must become a leader. The implications have important consequences for teacher preparation and supervision and for preservice and inservice training. Special emphasis might need to be placed on navigating the political and bureaucratic waters within schools and school districts where smooth sailing and calm waters are not always part of the climate. Such training will also need, according to Silva, Gimbert and Nolan (2000), to prepare teacher leaders to be articulate and confident so that they may provide administrators with an understanding and vision of the school as a community that values a culture of collegiality.

The last study addressed the preparation and behaviors of self-professed teacher leaders (Dils, 2001). It assessed current teacher-leader preparation and teacher-leader behavior by comparing selected teacher leader traits with those of the general population of public school teachers. Participants were selected using a stratified random sample of teachers whose e-mail addresses were available from their schools' web sites and from teacher e-mail listservs. Participants completed a survey which yielded 146 responses representing a 4.5% return rate. Results were significant in the following areas: (1) Teacher leaders had significantly more graduate degrees, were more likely to be education majors, showed a higher percentage of participation in mentoring other teachers, and showed significantly higher participation in group and individual research activities. (2) Teacher leaders tended to use technology as a teaching tool, develop and assess standards, hold membership in professional organizations, write for publication, write grants, and connect with higher education. (3) But teacher leaders did not tend to hold influential positions in professional teacher organizations or unions, initiate partnerships with businesses or other organizations, or run for political office.

The data collected in this study broaden the definition and description of the teacher leader. They also add more depth to a consideration for professional development for teacher leaders. For instance, Dils (2001) found that teachers with higher levels of education are more likely to resist conformity (74% of teacher leader respondents possessed a master's degree as

compared with 45% of teachers in the general population). Also, education majors were more likely to be successful in overcoming difficulties. This information has implications not only for the training of teacher leaders but also for the training of teachers in general. Furthermore, Dils' study concluded that role confusion occurs with shared decision making when teachers must learn to work with principals in different ways, and that teacher leaders need to work with parents as well as colleagues to create school community. Should, then, building relationships with principals and parents not be included in professional development for teacher leaders? Finally, in reference to professional development, the activities that most teachers eschewed may have been outside the scholarly domain and were therefore less appealing. This observation seems to confirm the findings in the work of Swanson (2000).

Conclusions and Implications

The 10 research studies reviewed provide insight into some aspects of the preparation of teacher leaders and their training for teacher leadership. The research base needs to be broadened and elaborated as teacher leadership evolves and public schools continue to address reform issues and react to the demands of the assessment and accountability pressures levied against them. The studies in this review suggest several conceptual and practical issues that are represented by Figure 1.

The studies provide data and conclusions that point to a need for an integrated approach to the professional development of teacher leaders with two major components: 1) situations and opportunities for practicing leadership that include principal support and modeling, a school climate conducive to teacher leadership, and colleague mentors; and 2) formal professional development, including partnerships with colleges. A third component and the nexus for the three is the teacher leader who possesses and/or develops the knowledge, skills, and dispositions that are critical for success in working with and within these components. Individuals possess some of these characteristics long before entering the field of education, but others are learned and honed with practice and observation. The three components are interactive and are influenced by as well as influence each other.

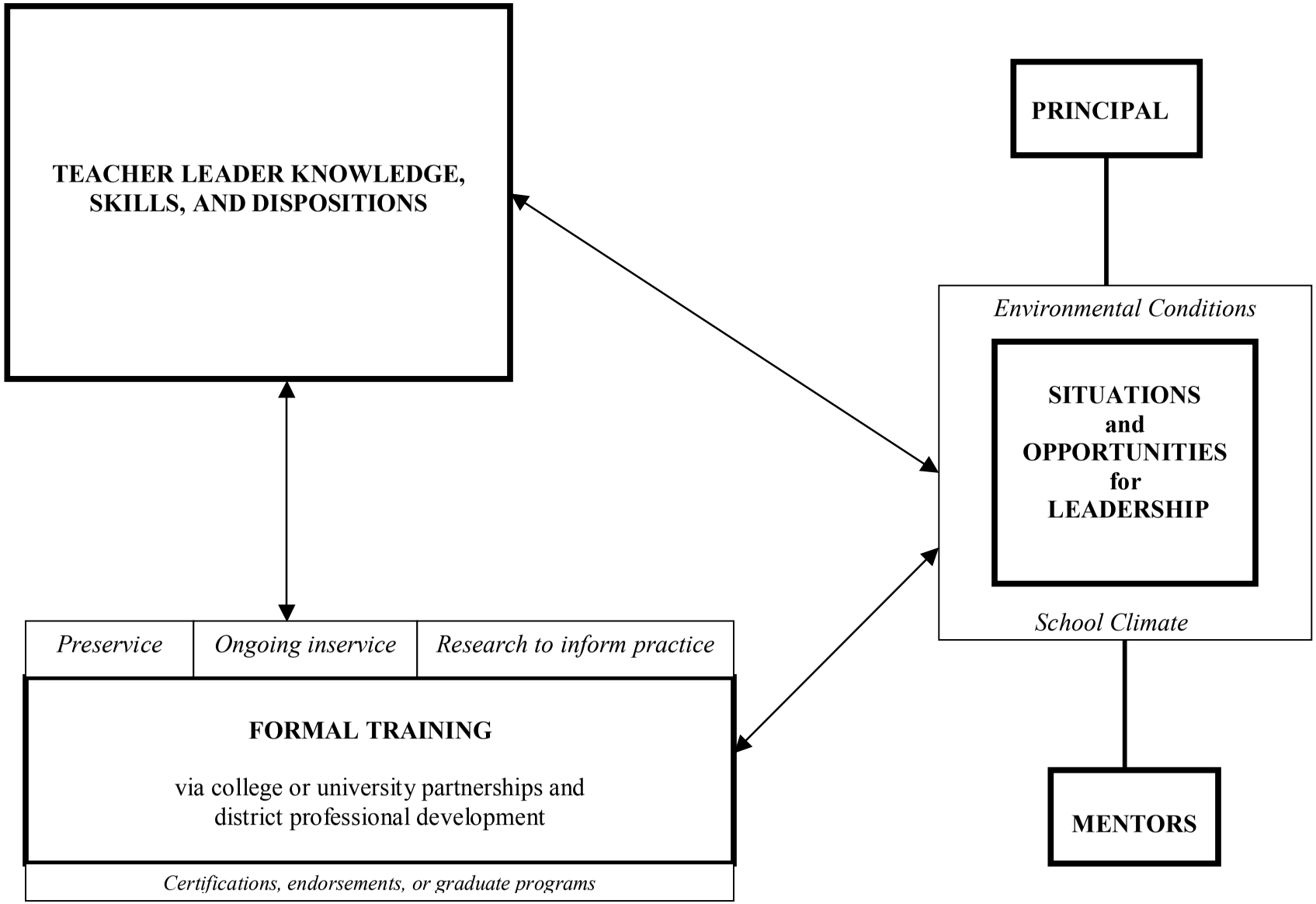

Figure 1. Conceptual model for professional development of teacher leaders

Currently, the professional development most readily accessible to teacher leaders is less structured and formal than may be necessary in the future. Now, teacher leaders are developed primarily by principals and colleagues who act as role models for the interpersonal skills necessary for collaboration and who engineer opportunities for teachers to discover and practice the skills of leadership on their own. If a school is fortunate to have a principal who understands the concept of a school as a community of learners and leaders, teachers may well develop into leaders. Nurturing school climates encourage leadership in all staff. Those teachers who are especially suited to leadership will expand and enhance their skills via networking inside and outside the school district and by taking coursework to increase their knowledge. But even in the best of situations, there are challenges in leading alongside administrators. These challenges are alluded to in the studies of Blase and Kirby (1992); Dils (2001); Silva, Gimbert, and Nolan (2000); Snell and Swanson (2000); Suranna and Moss (2002); and Zepeda and Mayers (2002).

Although an abundance of information exists on teacher leader qualities, skills and support for teacher leadership, there are few details available about the structures or specifics for delivering the training to develop them. With the standards and assessments movement in force, schools and districts no longer have the time and luxury of simply allowing teacher leadership to develop haphazardly. They know why they need teacher leaders, who teacher leaders are and what they do, but schools and districts do not appear to know much about how teacher leaders can be developed or how additional training would increase their satisfaction and efficacy. What does seem apparent is that if there is professional development, it must be well planned, and candidates for leadership must be encouraged to participate. This mandate is indicated in the studies of Suranna and Moss (2002) and Lemlech and Hertzog (1998). Furthermore, novice teachers can be trained to take on leadership responsibilities far earlier than has been traditionally thought, and the leadership void created by numerous retiring teachers must be filled more quickly.

One training model that has been used is a linkage between higher education and public schools that provides a partnership for offering advanced degree courses (Lemlech & Hertzog, 1998; Suranna & Moss, 2002) and instruction to train clinical faculty (Wetig, 2002). This is certainly not a new idea; more than 20 years ago Lieberman (1987) called for more involvement of higher education in the training of teacher leaders, and Combs, Miser, and Whitaker (1999) echoed the invitation over a decade later.

Of course, the implications for any professional development model extend beyond teacher leaders themselves. The fellowship that teacher leaders are capable of developing among staff will create a positive school climate that motivates a common followership of a vision for school improvement and success for all.

Need for Research

There is relatively little research on the formal preparation and training needed for and available to teacher leaders, current or prospective. Because effective school governance depends on shared leadership that involves principal-teacher partnerships, further investigation of this topic is needed.

CHAPTER III: RESEARCH DESIGN AND METHODOLOGY

This chapter addresses the methodology used to complete a cross-case study and analysis of the practices related to the development of teacher leaders and their specific needs for professional development. A review of the literature reveals that the knowledge, skills, and dispositions attributed to teacher leaders are influenced by their relationships with principals and mentors, as well as the school climate and environmental conditions that promote situations and opportunities for teachers to lead. The literature also describes some formal training opportunities for teacher leaders via college and university partnerships and district professional development that range from preservice models to ongoing inservice. Yet there is sparse research on how prepared teacher leaders feel when they assume positions of leadership or the kinds of special training they had access to or felt they needed in order to perform in a leadership capacity among their peers. This chapter discusses the design and methodology of this study and includes the rationale and procedures that were used in preparing for and conducting the research.

Purpose of the Study

The purpose of this study was to describe how well prepared teachers feel as they assume positions of leadership and what training or professional development they feel might make them more effective in their leadership roles. Data drawn from interviews, observations, and documents were analyzed and compared to develop individual teacher case study portraits, as well as a cross-case analysis. They provide insight into the processes and factors influencing the development of teacher leadership and a guide for creating a professional development program to address the needs of teacher leaders. While there may be similarities between teacher leaders in this school district and those in other school districts, there was no attempt to generalize beyond this case.

Research Design: A Cross-case Study Involving Description and Interpretation

A case study relies on intensive descriptions and analyses of a single unit or bounded system, which in this instance was a group of identified teacher leaders in one school district. Characterized as particularistic, descriptive, and heuristic (Merriam, 2001), the case study was an appropriate medium for this study of teacher leadership because it focused on a specific school division, developed a rich and comprehensive portrait of teacher leadership there, and sought to illuminate the reader's understanding of this phenomenon with concrete and contextual references to the participants' own experiences. It was, therefore, a natural framework for

attempting to describe teachers' preparedness for leadership and their self-identified needs for professional development.

Research Questions

The central question that directed this study was this: How do teacher leaders describe their preparedness to assume leadership roles and their continuing growth in leadership skill? Subordinate questions included the following: (a) What knowledge, skills, and dispositions do practicing teacher leaders say they need, but don't necessarily have, in order to help their colleagues and students be more productive? (b) How do these needs vary among elementary, middle, and high school teacher leaders? (c) How do these needs vary among specific content-area teacher leaders (beyond the demands of subject area expertise)? (d) How do teacher leaders describe their ongoing professional development and attempts to grow in leadership? Ultimately, the answers to these questions provided insight to the kind of leadership training that might be designed for the next generation of teacher leaders.

Procedures

The sections that follow explain the rationale for the design of the study and the description of the data collection, management, and analysis. Issues related to validity are also addressed.

Assumptions and Rationale for a Qualitative Design

A qualitative research design was chosen to allow for richly descriptive portraits of teacher leaders whose own voices would add credence to the data. Patton (1990) refers to this type of data collection as having "face validity and credibility" (p. 23). The researcher not only collected data, but the types of data – direct quotations and personal perspectives, observations, documents, and artifacts – allowed a depth of understanding and a holistic and contextual perspective of each participant's own lifeworld. Furthermore, the case study was a valuable vehicle for capturing unique differences from one participant's experience to another. Finally, as an exercise in "applied evaluative research" (Patton, 1990, p. 12), a cross-case analysis was appropriate.

The Researcher's Role

According to Patton (1990), the credibility of the researcher is "dependent on training, experience, track record, status, and presentation of self" (p. 461). In this study, the researcher's personal experiences inevitably played a role. As a classroom teacher and later as a central office

instructional coordinator and program supervisor, the researcher had experienced many opportunities to participate in district decision making and school governance issues. The researcher had held leadership roles in the school, supervised student teachers, mentored colleagues, taught graduate courses to prospective and veteran teachers, served as a district supervisor for a number of initiatives and instructional programs, and worked closely with principals and other district and state leaders. The researcher even served as the president of the local education association (while also working at the central office, a unique situation). These experiences added to the researcher's credibility among participants. Nevertheless, the researcher endeavored to identify and control any personal and professional influence on the collection, management, and interpretation of the data.

Triangulating data sources decreased the possibility of researcher bias on interpretation and evaluation of data. Interviewees were provided with transcripts of the sessions to check for accuracy; a peer debriefer reviewed memos and field notes, as well as interpretations of these notes to confirm plausibility and rationality. An auditor, the researcher's committee co-chair, offered guidance on the formats for examining and analyzing the large data collections and the coding and categorizing of the emerging themes. He later verified the data management and coding process. The entire research process was documented so that the procedures could be reviewed for consistency and bias. Eventually, the study participants were given the final draft of the study to check for any inconsistencies or misinterpretations of data. The researcher had experience and training in interviewing and observing teachers, as well as evaluating electronic journals and artifact collections (portfolios). In the end, though, the researcher returned "to the data over and over again to see if the constructs, categories, explanations, and interpretations made sense, if they really reflected the nature of the phenomena" (Patton, 1990, p. 477).

Gaining Access and Entry

As an employee of the school division, the researcher submitted a request to conduct a study via the established procedure and was granted approval. Principals were then contacted for teacher leader nominees to participate in the study. Since the district was embarking on a teacher leader initiative, any information related to this topic was of interest and made the researcher's future contribution to the subject appreciated.

Setting Selection

Miles and Huberman (1994, p. 27) substitute the word *"site"* for *"case"* because a case cannot be studied apart from its social or physical setting or without its context. A case may be defined by its individuals, a role, a small group, a community, or a nation. In this cross-case study, the outer boundary was the school division as a whole, which embedded a number of individual settings, that is, schools. The schools were categorized into elementary, middle, and high school configurations, each further defined by its own context and culture. Also, the participants in the study operated individually in the role of teacher leaders, thus representing a small group within these bounds.

Participant Selection

Participants in the study were identified through purposive sampling. Initially, a request was sent to the district instructional supervisors and principals to nominate one teacher who in their opinion was a teacher leader. They were advised on this request form that consideration might be given to department chairs, past or present Teachers of the Year, Eisenhower Lead Teachers, Nationally Board Certified teachers, math specialists, reading specialists, elementary lead teachers, algebra coaches, or those who had otherwise distinguished themselves among their peers as teacher leaders. Some other characteristics and descriptors previously reviewed in the literature were included in a checklist format to guide the nominators in their choices (see Appendix A). Those principals and supervisors who did not meet the deadline were reminded one time after the deadline had passed to return their forms. This request yielded 17 nominations from six content areas representing elementary, middle, and high schools.

Nominees were invited to participate in the study with a written explanation of exactly what activities would be expected of them and the amount of time they would need to commit to the project (see Appendix B). From those who committed, six participants representing a variety of employment contexts were selected for study. Employing a maximum variation sampling strategy (Merriam, 2001), the researcher selected participants to include a range in age, experience, subject matter, and leadership roles from among the ranks of elementary, middle, and high school teachers. As participants were selected, their particular characteristics were entered in a matrix (see Appendix D). When all the cells in the matrix were filled, then sampling ceased. As a matter of practicality and the recognition that qualitative studies demand attention to detail and richness of description, only six participants were used for this study.

After participants were selected according to the criteria checklist and representing a cross-section of gender, age, experience, and employment situations, the study and protocol were discussed with each of them and permission was collected from each participant.

Because these teacher leaders were asked to sacrifice their time, which is already at a premium, in order to participate in this study, permission was secured from the Professional Growth Coordinator for the school district to grant them licensure recertification points at the end of the study. Permission was granted for the completion of a special education project, Option #10 in the *Professional Growth Manual*. Participants were informed after they had been selected and before the study began that these points were in no way tied to the quality of their responses, portfolios, or observations. The researcher reminded participants that no compensation was forthcoming except their own professional growth.

Assurance of Confidentiality

Before the study began, each participant and the school district were assured of confidentiality. Pseudonyms were assigned to individuals, and any identifying characteristics of the region or school system were omitted. Written consent for participation was obtained from the school division and from individual participants after they had been fully apprised of the purpose, procedures, and proposed use of the data collected. Official permission to conduct this study was granted by the Institutional Review Board (IRB) of the University, and a consent form approved for use by the IRB was obtained from each participant (see Appendix B). After permissions were secured, a letter explaining the purpose of the research was sent to principals and instructional supervisors via interoffice mail requesting their help in identifying teacher leaders by a specified deadline. Along with the letter was a nomination form accompanied by a criteria checklist related to teacher leaders in general.

Data Collection: Instrumentation and Procedure

Data collection consisted of the following: (1) two standardized open-ended interviews (Patton, 1990) with each participant, (2) one observation of each participant engaged in a leadership activity of his or her choice, (3) three electronic journal entries addressing teacher leadership issues posed by the researcher, and (4) a portfolio of artifacts related to teacher leadership that were personally and professionally significant to each participant.

The researcher employed a tape recorder during the scheduled interviews and later transcribed these meetings. The researcher used field notes and an observation form during the

observations (see Appendix H) and memos afterward to record reactions and responses to participant behaviors as well as the researcher's own revelations. The researcher also used memos to summarize the review of each portfolio. The researcher recorded, stored, organized, and coded all data for subsequent cross-case comparison of each teacher leader's portrait. The data were also examined from knowledge based on the previously conducted literature review of teacher leadership. A thorough review of the literature enabled the researcher to make better judgments during the data collection and interpretation phase thereby facilitating the interpretation of the findings. The data collection process spanned 12 months.

Interviews

Prior to the first interviews, a pilot interview was conducted with a nominated teacher leader who was not used in the actual study. The pilot allowed the researcher to practice interview skills, to determine if the focus questions and probes were appropriate and adequate, and to anticipate possible new avenues for exploration. The resulting transcript was studied and questions were revised when necessary.

All interviews were completed in the teachers' individual classrooms or other settings of their choice. Lincoln and Guba (1985) state "that inquiry must be carried out in a 'natural setting' because phenomena of study . . . take their meaning as much from their context as they do from themselves" (p. 189). Thus, the most natural setting was each participant's own physical work environment (classroom or school), which promoted comfort and confidence and spurred reflection and genuine memory. The researcher had some pre-established focus questions and some probes prepared, but since the goal of this case study was discovery, not limitation to that which was already known, the design was more like a guided conversation with the interviewees discussing their experiences relative to teacher leadership. The researcher listened, responded only when appropriate, commented to verify understanding or to expand the conversation, and when necessary probed and redirected the conversation. To convey trust throughout the entire research project, the researcher remained nonjudgmental and assured confidentiality.

The interview format followed Patton's standardized open-ended interview (1990) designed to allow free-flowing dialogue with intermittent prompting and probing (see Appendix F). Each interview session was consistent in beginning with an introductory statement addressing the purpose of the study, interview conditions, clarification of terminology, necessity for candor and permissions, and assurance of confidentiality.

Personal Documents

Personal documents are a reliable source of data relating to a person's attitudes, beliefs, and views; they reflect the participant's perspectives, which are what most qualitative research is seeking (Merriam, 2001). The inclusion of these documents helped to develop a detailed portrait and deeper understanding of the phenomenon of teacher leadership. Additionally, it offered insight to the preparation and subsequent professional development that these teachers said was necessary in the work of teacher leadership. It also contributed to a "holistic" depiction of a context and the participants that interacted there (p. 9).

Electronic Journals

To complement the interviews, the participants submitted electronic journal entries that extended or elaborated the interview conversations, described their own teacher leadership activities and reflections, or responded to prompts from the researcher to further investigate some bit of data or some other topic not yet explored. The prompts were focused yet allowed participants time not available in the interviews to respond as individuals engaged in self-reflection. All participants were asked to write to the same prompts. Participants were asked to respond three times in a one-to- two-page informal format (see Appendix G).

Artifact Collections

Finally, participants prepared a portfolio of documents and artifacts that defined them as teacher leaders (see Appendix I). The portfolios included the following: evaluations of their work as teacher leaders, projects in which they were engaged, artifacts collected or given to them describing the mission and nature of what they do as teacher leaders and how they were perceived by colleagues, professional development opportunities in which they had engaged as learners and leaders, literature that they had reviewed, and other similar activities and mementoes. The artifacts included in the portfolio captured perspectives and data not mined in interviews, electronic journals, and observations and represented a multi-faceted, unique professional repertoire.

Observations

In addition, participants were asked to allow the researcher to observe them once while engaged in some activity that illustrated their teacher leadership. These observations served in part to support the participants' previous words via the interviews and journals and in some cases spoke louder than their words. The researcher completed an observation form at each observation

that recorded not only the participant's actions and words but also the audience's reactions (see Appendix G).

Controls for Validity

Merriam (2001) describes strategies to enhance internal validity, and some of these strategies were incorporated in this study: (1) triangulation, (2) member checks, (3) peer examination, and (3) researcher reflexivity. Three points of source triangulation included the interviews, observations, and personal documents (electronic journals and artifact collections). These supported, elaborated, and validated each other, as well as substantiated and confirmed participants' statements written and oral. They allowed the researcher to compare interview, observational, and document data; compare what people said in public (interview) with what they said in private (electronic journal); check for consistency between what people said about the same thing over time; and compare the perspectives of people from different points of view, i.e., experience, content area, gender, and status (Patton, 1990). Interviewees reviewed the transcriptions aiding the researcher in ensuring accuracy of wording. When reviewing memos and field notes recorded after observations or during document review, the researcher sought clarity on any points of confusion from the participants. The standardized open-ended interview format (Patton, 1990) required respondents to answer the same questions, and allowed the researcher to compare responses, an important feature in a cross-case study. Although this interview format reduced the particularization of each individual interview (Patton, 1990), the participants' responses in the electronic journals and the data collected in observations and artifact collections compensated for any reduction of individualism that may have occurred with the standardization of the interview questions.

Data collection spanned a period of twelve months and involved six individuals in a variety of teacher leader positions. This period of engagement allowed the researcher to establish rapport and trust with the participants. Periodic peer review was used throughout the study. This peer debriefer was a fellow educator with experience in qualitative research who assisted the researcher in maintaining objectivity by questioning assertions that appeared in researcher notes, observations, and conclusions. This monitoring also objectified the design of the study and the emergence of patterns and conclusions by checking for consistency and plausibility in coding and concepts. In addition to these strategies, the researcher made clear any personal views via bracketing during field notes to reduce impact on coding.

Although interviews were limited to the perceptions of the participants, observations focused only on external behaviors, and document analysis was selective, together the triangulation of sources complemented and supplemented each other (Patton, 1990). For example, the electronic journals were devoid of the immediate and unguarded emotions that spilled forth in an interview, but they allowed for more reflection and depth of response (Merriam, 2001). The artifact collection contained clues and insights not mined in the interviews and observations. Like a researcher's photographs, it provided a means of studying detail that might have been overlooked in the other data collections (Merriam, 2001). Finally, multiple data collections on individual participants and across participants helped to "crystallize" the research revealing a compilation of ". . . well-grounded, rich description and explanation of processes occurring in local contexts" (Miles & Huberman, 1984, p. 21).

Data Management and Analysis

First, a profile sheet was completed on each participant detailing personal and professional information related to teaching assignment, school, leadership role and other pertinent information (see Appendix E). Once data collection began, the data derived from the interviews, observations, electronic journals, and portfolios were "unitized," a process described by Maykut and Morehouse (1994) adapted from the work of Lincoln and Guba (1985). As a preliminary step to coding, units of meaning were identified and recorded. Combined with the discovery process (Maykut & Morehouse, 1994), which occurred when trying to assign meaning to the data collected from interviews, observations, and other documents, these procedures prepared the researcher to begin categorizing and coding. Utilizing the constant comparative method of data analysis (Strauss & Corbin, 1998), the researcher was able to see the patterns and themes that arose from the cross-case analysis. Categories came from three sources: the components in the conceptual model based on the literature review, recurring references from the participants themselves, and interpretations of the repetitions and patterns that crossed the data. According to Merriam (2001), these categories reflected "the purpose of the research," and were "exhaustive," "mutually exclusive," "sensitizing," and "conceptually congruent" (p.184).

Because a number of documents were used and the amount of data collected was great, sources were carefully labeled according to date, participant, and type of data on contact summary forms modified from those suggested by Miles and Huberman (1994). Using the constant comparative method, data were unitized, or identified as units of meaning, from the

typed interview transcripts, observation forms, and personal documents; then the units of meaning were categorized and coded; finally, categories were refined and relationships and patterns across the categories were explored (Maykut & Morehouse, 1994). Throughout the process of data collection, the researcher used a journal to facilitate the identification of any potential "discovery" in the analysis of data (Maykut & Morehouse, 1994, p. 132). Color coding, as well as a computer data base created in ACCESS, was employed to manipulate, manage, and analyze categories and units of meaning. Data were illustrated in tables or charts and concept maps. Miles & Huberman (1994) offered a variety of suggestions for matrix displays that were adapted once the variables and categories began to emerge from the data collection. These data in a graphic format helped the researcher to compare, contrast, analyze, and draw conclusions.

Transferability

Typical of interpretive or analytical case studies, this research was inductive and "the level of abstraction and conceptualization" (p. 39) depended upon the relationships among data that emerged (Merriam, 2001). By recording detailed impressions, demographic data, and thick descriptions of the participants and their contexts, the researcher provided a report that some readers may compare to their own situations and school contexts. However, this cross-case study was an intensive description, an interpretation of a single "phenomenon . . . occurring in a bounded context" (Miles & Huberman, 1994, p. 25), and there was no intent for the reader to transfer or generalize the findings and conclusions to similar or subsequent situations (Merriam, 2001).

Confirmability

In addition, findings were confirmed as a result of a complete and accurate record of the data collection and management procedures, as well as processes and stages of data analysis. Creating a detailed audit trail authenticated the findings and allowed for consistency in the collection and management of the data (Merriam, 2001).

Presentation of Findings

First, a description of the school district as the bounded context for this study was supplied. Then, profiles of each participant introduced the teacher leaders and were followed by detailed, descriptive stories of teacher leadership with emphasis on the voices of these teacher leaders. These portraits existed as individual vignettes that provided the collective foundation for the cross-case comparison and a general coding of data. Interpretation of the data began while

the data were being collected and examined for frequency and primacy of patterns, as well as individual context and group relevance. These patterns eventually developed into themes that provided the structure or subheadings for the discussion and interpretation of the data. Ultimately, these themes aided in addressing the questions related to professional development and training for teacher leaders.

In summary, the researcher presented the findings to reflect the phases of exploration, the instruments used (interviews, observations, and documents), and the emergence of patterns and themes. The researcher attempted to provide a clear, complete, and accurate explanation of the process, techniques, and instruments for collecting the data, analyzing the data, and interpreting the data so as to satisfy the epistemological and ontological concerns of colleagues and ensure that the study was successfully addressed. The researcher's goal was to meet the "criteria for judging qualitative research: credibility, transferability, dependability, and confirmability" (Trochim, p. 162, 2001).

CHAPTER IV: RESULTS

Introduction

The purpose of this study was to examine teacher leaders – their knowledge skills, and dispositions – and what influenced their development as leaders. Data obtained from the six participants focused on the effect that their mentors, professional environment and opportunities, and formal training had on them as they evolved into leaders in their schools and district. The research ultimately addressed what these teacher leaders felt they were lacking in terms of their knowledge, skills, and dispositions, as well as their suggestions for training future teacher leaders. The participants' backgrounds ranged from elementary to high school and from core subject academic teacher to resource teacher; they included one male and five females representing a range of professional experiences and years in the job.

Context for the Study

The study was conducted in a fast-growing, suburban school system of approximately 26,500 students and 4,500 employees located in the mid-Atlantic region. Growth has changed the complexion of this once rural district by altering its population's affluence and mobility. Since 1990, the county has built on average one school per year and has enlarged several others resulting in 30 attendance sites. The teacher and administrative staff have nearly doubled. Students hail from all over the United States and a variety of foreign countries. Keeping pace with the growth and changing population of 120,511 residents has been a financial burden on the school board and the board of supervisors, who have frequently been at odds over school funding and governance. One consequence has been a hold on the hiring of instructional supervisors and coordinators at the central office level resulting in the need for additional teacher leadership in the schools. A stipend was created to compensate these leaders at the high school level with the intention of expanding the number of teacher leaders to include middle school in the subsequent year. However, budget constraints not only prohibited this expansion, they forced the discontinuation of the stipends at the high school level. The good intention (creating a teacher leader corps) was further plagued by a loose interpretation of the role of the teacher leaders and the criteria and responsibility for selection.

Research Questions

The dominant question in this study was as follows: How do teacher leaders describe

their preparedness to assume leadership roles and their continuing growth in leadership skill? Questions to facilitate responses to this question included the following: 1) What knowledge, skills, and dispositions do practicing teacher leaders say they need, but don't necessarily have, in order to help their colleagues and students be more productive? 2) How do these needs vary among elementary, middle, and high school teacher leaders? 3) How do these needs vary among specific content area and resource teacher leaders (beyond the demands of subject area expertise)? 4) How do teacher leaders describe their ongoing professional development and attempts to grow in leadership? Eventually, the answers to these questions gave insight to the kind of teacher leader training needed for the next generation of teacher leaders.

Instrumentation

Descriptive data were obtained from a survey administered to participants and their principals who nominated them. Participants were selected in order to satisfy the following criteria: representation from each level of schooling (elementary, middle, and high school), from each core content area (English, math, science, and social studies), from both genders, and from a range of experience. Nomination forms and cover letters were sent to all principals and supervisors. Seventeen nominations were returned from which six were selected. Each form was dated when received, and a total score was affixed to each form based on the number of characteristics and roles indicated for each nominee. Once the nominations were catalogued according to time of receipt and score, the selection process stopped as soon as the other criteria were satisfied.

Descriptive data are recorded in Tables 1 and 2, Roles of Teacher Leader Participants; Tables 3 and 4, Characteristics of Teacher Leader Participants; and Table 5, Primary Influences on Development of Teacher Leader Participants. These data were culled from surveys completed by the participants and the principals or supervisor who nominated them for participation in this study.

Additionally, qualitative data were gathered via two interviews with each participant, an observation of each participant engaged in a leadership activity, three electronic journals submitted by each participant in response to prompts, and portfolios developed by each participant. Field notes were recorded at each interview, and interviews were transcribed and later coded. An observation form and field notes documented the observations. Electronic journals were coded, and field notes recorded data from the portfolios. Use of Access software

organized the data and displayed it so that it could be catalogued and eventually analyzed within case studies and across them. Data were primarily coded according to the conceptual model that emerged from the literature review. The dominant themes included the following: teacher leader knowledge, skills, and dispositions; situations and opportunities for leadership; and formal training. Data were collected during the course of one school year. Ultimately, the data were compiled and analyzed across cases in an attempt to answer the research questions.

Table 1

Roles of Teacher Leader Participants as Denoted by Participants in Their Profile Surveys

Participant	Mentor	Specialist	Dept chair	Educ assoc leader or rep	Team or grade-level leader	Clinical faculty	Rep to Supt's Advisory Committee	Member of School Improvement Team	Other
Fran	√				√		√	√	Math lead teacher
Holly	√	√			√	√		√	Staff developer
Lucy	√		√					√	
Ted	√		√		√	√			Member of two county government committees
Donna	√		√	√	√	√	√	√	√ (did not designate role)
Reba	√		√	√	√	√	√	√	

Table 2

Roles of Teacher Leader Participants as Denoted by Their Principals or Supervisors in Their Nomination Forms

Participant	Mentor	Specialist	Dept chair	Educ assoc leader or rep	Team or grade-level leader	Clinical faculty	Rep to Supt's Advisory Committee	Member of School Improvement Team	Other
Fran	√				√			√	√ (did not designate role)
Holly	√	√		√	√				developer of remedial reading program
Lucy	√		√		√			√	Instructional Support Team Coordinator
Ted	√	√	√					√	Candidate for local political office
Donna	√	√	√		√		√	√	
Reba	√		√			√	√	√	

Table 3

Characteristics of Teacher Leader Participants as Denoted by Their Principals and Supervisor

Participant	Life-long learner/ holder of advanced degree(s)	Taught on several grade levels	Content expert	Global view of education	Organized	Flexible	Positive	Active in community or political organizations	Seen as leader by peers	Courageous	Persevering and Patient	Servant leader	Change Agent	Collaborator	Motivator
Fran	√		√	√	√	√	√		√	√	√	√	√	√	√
Holly	√	√	√	√	√	√	√		√	√	√	√	√	√	√
Lucy	√	√	√	√	√	√	√		√	√	√	√	√	√	√
Ted		√	√	√	√	√	√	√	√	√	√	√		√	√
Donna	√		√	√	√	√	√		√	√	√	√		√	√
Reba	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√

Table 4

Characteristics of Teacher Leader Participants as They Perceived Themselves in Their Profile Surveys

Participant	Life-long learner/ holder of advanced degree(s)	Taught on several grade levels	Content expert	Global view of education	Organized	Flexible	Positive	Active in community or political organizations	Seen as leader by peers	Courageous	Persevering and Patient	Servant leader	Change Agent	Collaborator	Motivator
Fran	√		√	√	√	√	√	√	√	√	√	√	√	√	√
Holly	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Lucy	√	√				√	√				√	√		√	
Ted	√	√	√	√	√	√	√	√	√		√	√		√	
Donna	√	√	√	√	√	√	√		√	√	√	√	√	√	√
Reba	√	√	√	√	√	√	√	√	√		√	√	√	√	√

Table 5

Primary Influences on Development of Teacher Leader Participants as Denoted by Teacher Leader Participants in their Profile Surveys

Participant	Principal	Assistant Principal	School Colleague	Central Office Administrator	Community Person	Educator Outside School District	Formal Training (College, Grad Courses, Seminars, Conferences)	Networking via Professional Organizations and Workshops Outside District	Participation on School & District Committees and Activities
Fran	√		√	√			√	√	√
Holly	√	√	√	√		√	√	√	√
Lucy	√	√					√	√	√
Ted		√	√				√		√
Donna			√			√	√	√	√
Reba			√						

The Case Studies

Following are narratives of the six case studies. Each narrative begins with a summary of the data from the participant profile sheets completed by each participant and the nomination forms submitted by his or her principal or supervisor. Following each profile is a summary of data from interviews, e-journals, observations, and portfolios organized according to the themes of the conceptual model that emerged from the literature review.

The Case of Fran

Profile

Fran is a third-grade teacher nominated by her principal, who described her as a life-long learner. She has mentored other teachers because of her expertise in math and her status among her peers as a leader with a global view of education. She is forty-four years old and has taught for seven years after coming into education from the private sector. She was seen by her principal as flexible, positive, courageous, persevering, and patient. Additionally, she was described as an effective collaborator, motivator, and change agent within both her school and the community. As a servant leader in her school, she had served as a grade-level leader, representative to the Superintendent's Advisory Committee, and participant on the school improvement committee.

When asked to complete the same survey, Fran characterized herself exactly as her principal had. In that survey, Fran also noted the following as having had an influence on her development as a teacher leader: her principal, a school colleague, and a central office administrator (the math and science supervisor). She also noted that she had received some formal training to prepare her to be a teacher leader from the following activities: college and graduate courses, school district professional development seminars and conferences; networking via memberships in professional organizations and workshops outside the district; and participation on school and district committees and in other activities.

Knowledge, Skills, and Dispositions

Fran described a teacher leader as someone who should serve as a conduit for information, materials, and three-way communication among central office, teachers, and administrators. A teacher leader should also promote the subject area to enhance student achievement. This could be an individual who has been formally designated as a leader in the school building, or it could be someone whom people seek for instructional mentoring because

of experience and deep understanding of the content. He or she is a person that other teachers feel comfortable in asking for lesson ideas and parent tips. The teacher leader is approachable because of his or her confidence, passion and commitment, as well as patience, flexibility, and tolerance of colleagues' fears. This kind of support builds credibility, which Fran asserts is essential, especially if he or she is going to be an agent for change. She was emphatic in stating, "But I don't think I'm capable of changing someone's beliefs until they believe in the practice" (AI3-2, p.2), so modeling strategies for teachers is important. Being a change agent for Fran is about really wanting to make a difference. However, she has learned that she must lead by example. One of the artifacts in her portfolio, a Macarena CD, was included because she uses it to teach multiplication to her students. It is a symbol of her departure from the traditional "drill and kill" method of teaching mathematics and the direction in which she would like to take her colleagues. In describing this item, she remarked, "I want to be an agent for changing our mathematics instruction" (AP5, p.1). But she expects to

> take baby steps, . . . offer just a little activity here or a little lesson there or you hear about someone having trouble with one thing and just offer something . . . . You get the training and you build confidence within yourself and then you have to hang back and wait to be asked a lot of times. (AI3-1, p.3)

A willingness to share with humility and without emphasis on the ownership of an idea or strategy is paramount as long as she helps that person to get the job done. She said, "It's not being the mouthpiece all the time, you know, just planting the seed" (AI3-2, p.1). This selflessness is repeated in an e-journal response where she reflects that she must be "competent, knowledgeable, and concerned about the greater good of the building" (AJ2-3, p.2). Nevertheless, she has had to develop a thick skin, maintain a sense of humor, and learn to set realistic goals in working with her colleagues.

> I had some goals that I was really hoping to achieve, and I think, as with anything, I maybe didn't accomplish the goals that I thought would be accomplished, you know. Things didn't play out the way that I had hoped in some cases, but in some cases there's definitely been some positive shift in practice and in terms of mathematics instruction, which was one of my main goals, to encourage teachers to change some of their beliefs and practices. . . . I think I cause some of my own frustration, you know, wanting to set

> that bar really high but still knowing that my first priority has to be my own classroom. (AI3-2, p.3)

Being a teacher leader has also forced her to set priorities and know how much she can take on, a necessary skill, according to Fran. No matter how excited she gets about her role as a teacher leader, she reported that

> I have to kind of look and see what are my benchmarks, what am I coming to first, and so it kind of has to go my classroom, and then my grade level, and then my school, and then my county, and kind of in that order, kind of like a little mushroom . . .. You want to change the world, but which world – your classroom world, your building world, your county world? (AI3-1, p.2)

Being highly motivated and conscientious means that whatever job she has done, she has always done to the fullest extent possible and worked until the job was done to her satisfaction. But Fran lamented in one of her journal entries, "The problem with being effective always comes down to resources – most especially time!" (AJ2-1, p.2) She sees herself as a resource to teachers but admits that she is unable to do the kind of follow-up she would like with teachers with whom she has worked. She said, "I would love to do it all, but I've got to give up something" (AI3-1, p.2).

When Fran was observed conducting a session before school with other teachers, she demonstrated the knowledge, skills, and dispositions previously described (December 6, 2004). She was articulate, self-assured, and her colleagues clearly deferred to her as the leader without her having to announce her leadership. Although she controlled the agenda, she took suggestions from the others, validated their concerns, and clarified directives from the central office in her role as the liaison between the math and science supervisor and the school. She took responsibility for moving the group forward in an organized and respectful manner.

Not only is she generous with her time, but, as one of her portfolio artifacts indicates, she is also generous in spirit. While at a National Council of Teachers of Mathematics conference, she purchased "Math Teachers Have Great Figures" buttons for all the teachers on her grade level. They also demonstrate that a little humor will go a long way in working with colleagues.

Situations and Opportunities for Leadership

Fran credits her principal and a significant mentor, the district supervisor of mathematics and science, for providing opportunities and guidance for her to grow in leadership.

They have both provided opportunities for her to present sessions to the school staff and at district seminars and state conferences. Her principal also selected her to be a mentor to a new teacher as part of the district's CAMP (Colleague Assistance and Mentoring Program) program.

Principal. Fran described her principal as someone who was supportive and interested in promoting math instruction. She had provided a lot of training for her staff and been involved in laying the groundwork for the district math specialist program. As Fran stated, "She had a vision; she had the big vision" (AI3-2, P.6). But merely sharing a vision isn't enough. Fran reflected in her e-journal, "In order for a teacher leader to be effective, they must work with the administrator to develop goals for the school that are in line with the county expectations and then work together to formulate a realistic plan for meeting those goals" (AJ2-1, p.2). Fran's principal supported her efforts by making it clear to teachers that the changes in mathematics instruction were necessary and that some directives were negotiable, but some were definitely not. She had expectations of all teachers to use the math exemplars, for example. She required all faculty to participate in professional development sessions, such as two referenced in Fran's portfolio. Fran included a floss artifact from one training that she had used with teachers to symbolize the five strands necessary for mathematical proficiency in students. From another training she included index cards from a rubric scoring activity. Her principal was reassuring when some teachers were less than cooperative or resistant to change. She assured Fran that she should not take their reticence personally, saying, "It's not you; it's them" (AI3-2, p.2). She had an open-door policy and shared a comfortable rapport with Fran. She also allowed Fran to develop and implement several schoolwide math events, such as the St. Jude's Mathathon and the Be Excited about Math Day. She permitted Fran to put a math problem of the week on the morning announcements, too. As a result, a more collegial climate has begun to develop encouraging Fran to share her expertise formally and informally within the school. Now teachers feel comfortable coming to her for math activities and strategies, as well as advice that often begin with "I've got this kid; what do you think?" (AI3-2, p.2)

Although Fran did not always get the follow-up that she had hoped for, she understood that mathematics was not the only thing on the principal's plate. In fact, Fran stated that she herself was not always "aware of the overall picture" (AI3-2, p.5) and had to remind herself to be cognizant of her principal's competing priorities.

School climate and environment. Fran's relationship with her principal is a good example of the support that is necessary in a school when a major initiative coming out of central office puts a teacher leader in the middle of the principal, the school faculty, and the edict from the district office for instruction. Whether the initiative is viewed positively or negatively by the principal and/or the staff, Fran's principal showed support for the initiative and respect for the position that her teacher leader was in. She created a climate that encouraged the faculty to learn more about the new direction for the math program and held them to high expectations as they began to implement it under Fran's guidance.

Mentors. More profound was the impact that the supervisor of mathematics and science had impressed on Fran's development as a leader among her peers. Like the principal, she arranged situations and provided opportunities for Fran to grow in leadership and content knowledge and pedagogy. She drafted Fran to serve as a lead teacher for mathematics at her school. In this role, according to her e-journal, she was expected to attend monthly meetings and

> disseminate information and materials from central office serving as a conduit for communication between teachers, administrators, and supervisors; to assist in formulating curricular and instructional plans that improve student achievement in specific content areas; and to work with teachers to promote a deeper understanding of and more effective teaching strategies in specific content areas. (AJ2-3, p.3)

The latter required her to develop and deliver professional development seminars at her school and at the district level. Fran's supervisor also requested that Fran serve on the steering committee for the district textbook adoption and in her portfolio, she included an artifact (a magnet provided free by a textbook company) as evidence of her disdain for the influence that companies try to exert on the textbook selection process. Her supervisor also asked her to attend the rubric report card training as a math teacher leader and trainer. Fran's supervisor, who was instrumental at the local and state levels in initiating the math specialist program in Virginia, encouraged Fran to earn the math specialist certification. She procured funding for Fran to attend and present at regional, state, and national conferences. In addition, she arranged for Fran and her principal to participate in the Lenses on Learning training.

But she went even farther in actually modeling the kind of thinking processes that she wanted teachers to use with their students. Fran described her as a constructivist. "You know, she doesn't usually tell you how to do something. She kind of poses a question that's kind of going

all the way back to problem-based learning" (AI3-1, p.5). In short, her supervisor was a mentor grooming her to become a math specialist by providing her training, opportunities and situations for practicing leadership, and modeling the behaviors that she expected of those leaders.

Formal Training

Fran was fortunate to have been encouraged to attain the math specialist certification because it afforded her more formal training than that available to most teacher leaders. The certification required her to earn a master's degree in math leadership at the University of Virginia. The coursework enhanced her content knowledge and leadership skills and left her feeling more confident as a lead teacher at her school. Additionally, as part of an Exxon Mobile Grant, she received leadership training on a regular basis from a math consultant/professor who came to the district to work with math lead teachers and specialists. A dividend of this training was participation in a lesson study (following the design of the Japanese lesson study). Monthly meetings with the math supervisor also provided some training for math lead teachers. Fran noted:

> It gives an opportunity to ask our questions and grow and learn and then we do have an opportunity to network some and talk about what's going on in our schools. And so I guess that is a really strong component of our leadership meetings, even though we don't talk a whole lot about leadership within our schools. (AI3-1, p.4)

The Case of Holly

Profile

Like Fran, Holly is also an elementary teacher currently assigned to second grade. She is forty-five years old and has a total of nine years of experience in teaching. Nominated by her principal, she was described as a life-long learner holding an advanced degree, who understands that serving others is a keystone of leadership. She is experienced at a number of grade levels and is considered a content expert who willingly shares that expertise with those in her school and at the division level. She models courage, perseverance, patience, organization, and flexibility, earning her respect among her peers. She has the power to motivate others and exert an impact that exceeds her classroom. According to her principal, she has served as a mentor to new teachers and other colleagues, a science lead teacher, an education association representative, and a grade-level team leader (see Table 2). Furthermore, she took the lead in developing a new remedial reading program for her school.

In describing herself, Holly added that she has also served as clinical faculty for student teacher supervision and a representative to the school improvement team. In addition, she has presented at several staff development sessions at the school and district levels. She commented on her profile sheet that she "loved to collaborate, loved to read and learn new strategies, loved to think about curriculum and write curriculum." She also noted that her principal and assistant principal, as well as a school colleague and a central office administrator, had been instrumental in her growth as a teacher leader. Her formal training included graduate courses, professional development seminars, workshops, and conferences. She also held membership in several professional organizations.

Knowledge, Skills, and Dispositions

Holly's version of a teacher leader is a person "who likes to learn about and utilize strategies that help as many kids succeed as possible who then shares that information with other people so that everybody can be successful" (BI3-1, p.10). Her e-journal extends this description: "Teacher leaders tend to be people who are seeking intellectual challenges for themselves, who then share their excitement about what they learn" (BJ2-3, p.5). He or she will support a colleague, model lessons for a teacher, and find time to talk to coworkers because Holly says that a teacher leader is interested in other people. To accomplish these tasks, a teacher leader is constantly willing to learn more and possibly take a risk now and then.

According to Holly, a teacher leader has a variety of interests in lots of different areas and could easily go off on a number of tangents, but only time constrains a teacher leader because there is only so much time to give to something to carry it through. Holly explained that teacher leaders don't just conceive an idea; "they carry it out; they follow through with it" (BI3-1, p.12). So a teacher leader has to focus on what is most important.

Charisma and enthusiasm help a teacher leader to motivate other teachers and students and inspire confidence in them. And Holly thinks that teacher leaders have to maintain faith and a positive attitude and trust that their colleagues' abilities and passion to move a project or initiative forward. A teacher leader actively seeks to collaborate with others, providing staff development, developing new programs, organizing events, or simply talking quietly or sharing information one-on-one with other teachers. Building collegial relationships involves gaining the confidence of their colleagues by exhibiting a strong instructional background, working together, and acting as a role model; collaboration will not thrive if one person is intent on telling others

what to do. These characteristics are evidenced in Holly's portfolio reflections on an opportunity to team teach with a partner. Holly found the experience to be enlightening and beneficial for herself as well as her students.

> While my partner and I did not entirely agree on everything, we found a way to communicate our beliefs to each other, to come to consensus about the approaches we would use, to learn to trust each other enough to try things outside of our own comfort zones and to share both the successes and struggles. (BP1, p.3)

At the same time, teacher leaders must regulate their involvement somewhat, Holly suggested. She knows that she will at some time have to say "No" to a request, and that's hard for her because she's "one of those people who say, 'Sure, I can do that!' to almost everything" (BI3-2, P.10).

Indeed, passion and energy are conspicuous traits in Holly, who thinks that sometimes teacher leaders will seem "obsessed with what they're doing" (BI3-1, p.9). Holly considers this obsession a positive trait, though, like "running a film always in the back of their minds, everything comes in. 'Well, how could this be? How could this make things better? How could we use this to improve what we're doing in our schools?'" (BI3-1, p.9) Additionally, Holly asserts that teacher leaders "think in a broader way" and look at things "in a more big picture manner" and then are able to consider all the information and options and "condense what's most important into what they're doing" (BI3-1, p.11). They are more open-minded and therefore are not necessarily bound by strict rules and adherence to only one way to do things. In her portfolio, she included a program manual that she developed and shared with other teachers. She said,

> I am forever getting frustrated with packaged curriculum programs because they either do not meet the needs of the SOL's or of my group of students or simply make no sense in their organization. So, I have to develop my own program frequently from research and other program parts. (BP4, p.2)

However, teacher leaders must think and act "pretty carefully because if they don't somebody's going to call them on it" (BI3-1, p.11). Because of the influence they can wield, they must be responsible and knowledgeable. In her e-journal, Holly admitted as a teacher leader to feeling "far more vulnerable to failure," but "all this disequilibrium about leadership and self-perception is part of the process" (BJ2-1, p.3). Although they do not need to possess a master's degree or a

doctorate to be credible, Holly warns that teacher leaders must know the research in their field, be widely read in the subject area, and be familiar with the most effective pedagogy.

Situations and Opportunities for Leadership

As a result of her relationship with the district coordinator for elementary education and the trust invested in her by her principal, Holly has been the beneficiary of a variety of opportunities to engage in the work of leadership and learn its lessons from respected role models. And by injecting her own drive and enthusiasm into problems she perceives as needing solutions, she has created her own situations to lead.

Principal. Holly's principal has provided situations and experiences that have helped Holly to grow professionally, and their rapport that has helped her to feel empowered. He selected her to serve as a mentor to first-year teachers in the CAMP (Colleague Assistance and Mentor Program) program. When Holly wanted to develop a reading program targeting at-risk students who weren't being served by the current reading program, he enthusiastically endorsed it and trusted her to implement it. This project was additionally challenging because it depended heavily on parent volunteers and other staff who had to be convinced of its worth and then trained to participate. His trust in her ability was evidenced in an observation of her working with parents to prepare them to help in the implementation of the reading program (January 27, 2004). She exhibited expert knowledge, reviewed a manual she had prepared for them, and articulated with confidence and professionalism the mission and procedures involved. The easy rapport she quickly developed with the parent volunteers was based in part on her ease in inviting questions and answering them while maintaining control. In initiating this program, she created a situation that spawned two more teacher leaders whom she mentored. Holly believes that she is also helping her principal identify future teacher leaders in that "Administrators don't always have the opportunity to see what goes on behind the scenes of teachers who have the potential to be teacher leaders" (BI3-2, p.8). She exclaimed that she really likes developing programs and considers her work an adventure.

School climate and environment. Clearly, the climate at Holly's school breeds teacher empowerment, not just collegiality. The principal trusts the leadership of all his teachers (Holly in particular), and they trust him. He doesn't just encourage their input and problem solving, he relies on it.

Mentors. Other opportunities for leadership have come from the science coordinator, who

selected her to serve as the science lead teacher in her school, and the elementary education coordinator at the central office. And she has completed the certification to become a technology resource teacher, a job she has since assumed. This new assignment takes her out of the classroom and makes her a full-time resource to teachers and students. With the new job, Holly is not without concerns about navigating yet another layer of the administrative hierarchy as she reports to both a principal and a central office supervisor.

Formal Training

Although Holly has earned a master's degree, she continues to be a life-long learner. In addition to attaining a separate endorsement in art and a certification as a technology resource teacher, she stated that she does a lot of educational reading each summer. In addition, she is working on an endorsement in supervision and administration. She is a member of VASCD (Virginia Association for Supervision and Curriculum Development) and participates in its conferences and workshops. Her portfolio contained a lesson plan inspired by one workshop with Grant Wiggins on Understanding by Design and a videotape produced as a project for her administration class entitled "Leadership Perspectives from Teenagers" in response to John Gardner's *On Leadership.* A teacher's teacher, she emphasized that some of the best training for leadership actually is learned in the classroom, "because what are teachers but leaders in their own little realms" (BI3-2, p.8). She elaborated on this perspective in her e-journal: "Teachers spend every single day being leaders, making crucial leadership decisions and establishing a vision within their classrooms. So in education, everyone is a leader" (BJ2-3, p.4).

The Case of Lucy

Profile

At age thirty-six, Lucy has a total of twelve years' experience in education and is the youngest participant. She currently serves as the Instructional Support Teacher (IST) at her elementary school because of her background in special education. As the holder of a master's degree with an endorsement in administration and supervision, she also serves as the administrative designee for her principal. Her principal also referred to her experience as a CAMP coordinator for her school, a department chairperson and grade-level leader, and a member of the school improvement team. Checking all but one category on the survey, her principal is obviously confident in Lucy's abilities.

Lucy noted that her principal and assistant principal had been influences on her growth as a teacher, and she had received formal training in graduate courses and professional development seminars and conferences. Her networking with others via membership in professional organizations and attendance at workshops outside her school district, along with participation on school and district committees, had also been influential in her growth.

Knowledge, Skills, and Dispositions

Lucy defined a teacher leader with the following descriptors: organized, enthusiastic, knowledgeable, ethical, focused, positive, professional, reflective, and trusting. Her e-journal adds that a teacher leader is unafraid to take risks and try something new. "Kind" was not an adjective that Lucy said she would use to describe a teacher leader because "sometimes being kind can get you into trouble. You know, you do more than what you're supposed to or kind of compensate for somebody who's not doing what they're supposed to" (CI3-1, p.16) and some people take advantage of that kindness.

She indicated that one could recognize teacher leaders because they are collaborators, mentors, life-long learners, great teachers, facilitators, researchers, committee members, and good communicators. She stated in her e-journal that they avail themselves of opportunities to dialogue with colleagues, read professional materials, and participate in professional development. She was adamant that a teacher leader needed first to have developed a well-defined professional philosophy based on a foundation of solid research, and he or she should be able to "quote the research" (CI3-1, p.19) when engaged in professional dialogue and be knowledgeable about effective pedagogical practice. A teacher leader builds a professional reputation by using time wisely, being on time, and being organized; these qualities demonstrate that he or she cares about others. A teacher leader is also trusted to be a liaison between the central office and the school in relaying accurate information. Lucy stated that a teacher leader's reputation also hinges on the ability to build rapport with parents, students, and staff. She suggested that one way to establish a good working relationship with teachers is to go into their classrooms and "model a strategy and they can kind of reflect on their own teaching . . . give them that time where they're not up in front of the class" (CI3-2, pp.19-20). Lucy has frequently modeled lessons for teachers and their students and even volunteered to team teach with a social studies teacher. To offer this kind of assistance, Lucy believes that a teacher leader must be fairly comfortable in this role and know that he or she will need to take time in effecting change – and

that changes may be minor. She cautioned that "you have to be honest with yourself, your limitations and what your strengths and weaknesses are" (CI3-1, p.18). Mentoring other teachers is a responsibility for teacher leaders because it improves their skills and then they can become resources to their peers. "They probably don't realize that they, you know, are being a leader for other teachers who are looking up to them" (CI3-1, p.16), Lucy stated. And, after all, teacher leaders "like to be surrounded by people who are strong teachers themselves" (CI3-1, p.19).

According to Lucy, self-reflection is an essential trait of teacher leaders, and reflection should be a component of every teacher's preparation. She acknowledged, "I think some people do it naturally and I think some people just don't . . . and I think that's kind of the line between someone who's going to get better and someone who's going to kind of stay the same" (CI3-1, p.16). Unfortunately, comments in her e-journal reveal some doubts: "I feel that self-reflection is a skill that cannot be taught. You may encourage teachers to participate in self-reflective activities; you can tell teachers that they need to be reflective in their teaching, but who can really monitor it?" (CJ2-3, p.5) One instance of her own self-reflection came after Lucy completed the IST process with teachers in her building. She asked them to complete a form about how they thought the process had gone and she received valuable feedback from a rating scale and comments about their perceptions. But her own self-reflection can be characterized by the following admission in her e-journal: "The more I know, the more I realize I need to know" (CJ2-3, p.5).

Because Lucy's situation is different from the other participants in that she does not have an assigned class load, some teachers see her as a resource teacher similar to the reading or math specialist, and they sometimes wonder (sarcastically) what she really does. Rather than being offended, she approaches their negative attitudes with the perspective that at least they are showing interest, and she counters sincerely with an invitation to come and visit her.

Situations and Opportunities for Leadership

Lucy's role as an Instructional Support Teacher with no assigned students has given her the time and job structure to practice her leadership skills on a daily basis. Because the nature of her job demands that she interact with her colleagues in a different manner (mentor, pilot program coordinator, staff developer, role model) she has multiple opportunities and situations to serve faculty and students while enhancing her leadership.

Principal. Lucy's leadership has been, as she described it, "a process" (CI3-2, p.14). She feels fortunate to have been supported by her principal and assistant principal, who have structured situations for her to practice her leadership. They have

> been pretty good about giving me opportunities to do things to further my leadership. They said, "You know you really have the knowledge; you can chair some of the IEP meetings" and things like that. So they've been able to – or I've been able to kind of learn from being given that opportunity. ... A couple of times when they've been out of the building, they've let me preside over an awards assembly, which is something I wouldn't want to do – But when you're kind of forced to do something – so that was a good experience. (CI3-2, pp.20-21)

Lucy also reported that both the assistant principal and principal's support has extended to lobbying on behalf of Lucy with the director of special education at the central office.
Her principal has also asked Lucy to address the faculty in meetings giving her practice in public speaking before large groups. In addition, Lucy has served as a mentor to new teachers in the district CAMP program for the past three years, and in her school the principal has arranged for her to work more on instructional issues with the new teachers and not just on procedures and paperwork. At Lucy's urging, the principal has consented to allow teachers to observe her modeling strategies with other teachers and their students and then evaluate her. Her relationship with her principal is positive. "She's very good about kind of bouncing things off and treating me like a colleague" (CI3-2, p.21). But Lucy makes it clear that she knows that there is an administrative hierarchy and she knows her place; she is a teacher leader and not an administrator.

School climate and environment. Like Fran's principal, Lucy's principal has done much to help Lucy grow in leadership, because the program she coordinates is one that will benefit her school enormously. Pilot programs are sometimes risky and when implemented certainly not without their problems. But a school that welcomes this kind of challenge and a new model for teacher leadership is a school of possibilities that is willing to share governance.

Mentors. Lucy did not refer to any individuals as being mentors to her per se. Nevertheless, she had received assistance along her road to leadership. In addition to her

principal's support, Lucy had been given additional opportunities from the special education department at the central office to hone her leadership skills. She was trained to be an IST and asked to pilot the program at her school, evidence of the trust that administrators inside her school and at the central office had placed in her abilities to lead. One of the responsibilities of her job was to meet regularly with classroom teachers who have students being served by this program. An observation of one of these meetings revealed Lucy's leadership style to be informal but purposeful with an established agenda. The principal was in attendance, and Lucy and the principal shared equally in the leadership, although Lucy contributed more to directing the discussion. She was respectful and frequently acknowledged the contributions of others, and the teachers deferred to her leadership without any formal cues from Lucy. After the meeting, one of the teachers commented, "good job at the meeting" (April 28, 2005). Furthermore, Lucy has delivered districtwide professional development sessions for other special and regular education teachers. Artifacts in her portfolio include strategies, agendas, action plans, and follow-up materials from the sundry professional development sessions she has conducted and meetings she has chaired.

Formal Training

Her enhanced special education training has made it possible for her to serve as the educational evaluator in every child study at her school. In addition to her special education training, Lucy has earned a master's degree with an endorsement in administration and supervision, and she networks with other educators in the local chapter of Delta Kappa Gamma, a sorority of exceptional women educators. A newsletter in her portfolio indicates that she holds a leadership position as secretary for the chapter.

The Case of Ted

Profile

Ted is the only participant nominated by a central office administrator, the coordinator for social studies, and the only male. At age forty-three, he has spent sixteen years in the field of education, first as a professional support person and long-term substitute and finally as a teacher at the high school level. In addition to teaching Advanced Placement Government and other social studies courses, he has served on the Long Range Planning Committee for the county and on the Redistricting Committee. As with the other participants, Ted exhibits similar characteristics and has held positions at the school and district level that have qualified him as a

teacher leader. He has been a mentor to new teachers and other colleagues, served as the lead teacher for social studies representing his school, served as department chairperson and a team or grade-level leader, and represented his department on the school improvement team. Moreover, he has been on clinical faculty for student teacher supervision and a representative on the Superintendent's Advisory Committee. An additional leadership role made him stand out among the other participants: He has been a candidate for local office on the county board of supervisors.

Ted noted that, unlike the other participants, only his assistant principal and a school colleague had been primary influences on his growth. Ignoring all the other options posed on the profile sheet about influences on his professional growth, he instead made a point of writing on his sheet that "Experience in the classroom has been a primary influence." Like the other participants, he checked similar statements on the survey, and mentioned having been nominated for several awards.

Knowledge, Skills, and Dispositions

Ted's description of a teacher leader focused more on how a teacher leader interacts with his or her peers. He began by saying that a teacher leader needs to be inclusive and try to bring people together to work cooperatively. In his e-journals, he reiterated this notion stating that a teacher leader needs to be "open and receptive to others and to be truly open to differing views. Whether in good times or bad, the leader needs to seek out the opinions and views of those with whom they work" (DJ2-1, p.6). A teacher leader must develop rapport and build camaraderie and "establish a respectful environment where everyone feels as though their opinion is desired and appreciated" (DJ2-2, p.6). Ted believes that a teacher leader is a servant leader representing a "constituency" and advocating what's best for colleagues and providing "services when people need the services and then stay in touch with them . . . and have an idea what they're thinking and where they're going" (DI3-1, p.25). He defines this interaction as being a politician. Ted's political skills were observed in a county Long Range Planning Committee meeting which he chaired and to which he had been politically appointed (January 12, 2005). While directing the discussion, he recognized the contributions of others, asked for their input and for validation of his ideas. He followed up on previously assigned tasks and delegated others. He was respectful of the committee and articulated his appreciation for their service.

For Ted, providing services might include getting supplies, developing the department's

schedule, and performing "preventative maintenance" (DI3-1, p.25) for new teachers to make sure they know ahead of time what they need to do He also meets with teachers beforehand to give them a "heads up of things" (DI3-1, p.24) that are coming out of the school's administration and leadership team meetings, listening to teachers, and giving them straightforward advice.

Just listening to teachers is a valuable service, Ted claims. Being a sounding board, however, requires a teacher leader to be accessible, approachable, and discreet. For example, a colleague could come to a teacher leader and say, "I'm just blowing off steam" (DI3-1, p.24), and the teacher leader would be trusted to keep the colleague's remarks in confidence. Ted also noted that his peers know that he won't judge them, but if they have mishandled a situation, he will tell them that their reaction was inappropriate.

"People's legitimate concerns should be listened to" (DI3-2, p.26), and they should be respected. But interpersonal interactions can be difficult, and teacher leaders need to be "diplomatically frank" (DI3-2, p.26) in "putting out fires, as well as troubleshooting" (DI3-1, p.24) while at the same time modeling a positive attitude. Ted advised that knowing "your clientele and their personalities" (DI3-2, p.26) is helpful "because you have to accept them for the way they are, and a lot of people have a hard time with accepting, you know" (DI3-1, p.25). According to Ted, he sometimes feels "sort of a fraud" knowing that he can't necessarily repair a situation or solve a problem for a colleague:

> You can commiserate with people that are unhappy and this, that, and the other. But then you have to sit there and sort of try to steer people into more positive ways. That can be the hardest thing to do. And the other thing that is part of the honesty aspect is when somebody is unhappy and they're unhappy about X, and you know you can't change X and they can't change X; it's just going to be that way. . . . (DI3-1, p.26)

Being positive in a negative situation is an attitude he tries to model even when he does not always feel positive, especially about a decision coming from his superiors that he has to relay to his department. He admitted that "you either have to make it work for you or work around it because otherwise it will color everything you do and every person you talk to, "damaging relationships and eroding his leadership"(DI3-1, p.26).

In his e-journal, he said he tries to "assess what is possible to do and what is not. Often irksome members of your department will complain about miniscule issues. One needs to be empathetic but not expend efforts on unworthy issues" (DJ2-1, p.7). Sometimes Ted said that in

working with his peers he has to remind them that everything is relative:

> If your biggest complaint is that you had to give up your planning period for an SOL test, then you say, "You're not giving an SOL test. You know, you have no SOL's. You know, it's all relative; you're not sitting here worrying about SOL's." (DI3-1, p.24)

Ultimately, though, Ted thinks that having people skills empowers a teacher leader to make his or her peers feel as if someone cares about them, even if some of their complaints can't be resolved to their liking. And sometimes his peers know that he has to balance individual satisfaction with the best interests of the department as a whole.

Ted indicated that dealing with the practical as well as the personal elements of teacher leadership means that teacher leaders must be proficient in time management, "practice what they preach," and maintain credibility if they are to be effective. He does not give much credence to "theoretical stuff" when it comes to his leadership because he feels that the "practical stuff" takes precedence in the tasks he and his peers must address (DI3-2, p.22).

Situations and Opportunities for Leadership

Ted has benefited from serving in a number of capacities in the school system and the community at large that have required him to exercise and grow in leadership. He was the lead teacher for social studies for five years representing his school at the district level and a department chairperson at his school. He created the master schedule at a previous school, and an artifact in his portfolio indicated that he was so successful that his principal asked him to do it again the next year. He has served on the Superintendent's Advisory Committee in his current school district and on the block scheduling committee at his high school. Moreover, he has been instrumental in organizing the Student Government Day. Outside the school, he has run for local public office twice and continues to serve on the Long Range Planning Committee for the county. Also, he was appointed by the Commonwealth of Virginia to serve on a commission for civics education.

Principal. Although he did not consider his principal to be particularly influential in his development as a leader, he acknowledges that to be an effective teacher leader, he has had to build rapport with the principal and the assistant principals. And he has had to learn to "pick his fights" and select "the right time" to approach administration about issues (DI3-1, p.23). Even so, Ted stated that real teacher leaders are honest and have to be willing to say what they think and report the truth, even if administration may not be comfortable hearing what they have to

say. This is another situation, Ted repeated, where exercising good communication and political skills is essential. However, he believes strongly that a teacher leader shouldn't just bring complaints to administration; he or she should offer solutions and attempt to be constructive in solving problems and addressing difficult issues.

School climate and environment. Nevertheless, Ted knows that a school's climate is affected by the way a principal exercises authority. Ted remarked in his e-journal that

> there is a natural barrier between levels in an organization. It is not visible, but clearly present. It is incumbent on those in the leadership role to know when to use it and when to dispel it. Doing this instills trust and a rapport that can handle even the worst situations. (DJ2-1, p.6)

A principal also has the responsibility to foster an environment where teacher leaders are nurtured and encouraged. But even when the climate suffers due to discord among the faculty on divisive issues, Ted believes that a teacher leader owes the administration loyalty and respect. Ted stated that sometimes, though, negative teachers can rise to positions of leadership, and even though most people will gravitate to positive leaders, those who are negative can draw a base of support. Ted warned that "these individuals will be leaders – of a climate of negativity and complaining" (DJ2-3, p.6), a warning for principals who are not wise in their promotion of certain individuals.

Mentors. Ted specifically mentioned that a teacher colleague had had a tremendous impact on his evolution as a teacher leader through informal mentoring and demonstrating many of the leadership characteristics that he described in his interview or practiced himself. While she engaged in leadership roles within the school and interacted with her peers and the administration, he witnessed her finesse. He especially appreciated the lessons he learned from her about listening to others and being open to their input, about giving advice – but only if someone wanted it – about keeping confidences and not betraying other colleagues, and about her willingness to help others.

Formal Training

Ted participated in a five-course teacher leadership certification program offered through the local university. It was specifically designed to develop teacher leaders and provide additional training for those already in leadership roles. One of the sessions that was particularly memorable for him involved the administration of the Meyers Briggs Inventory. Although he

was well acquainted with the research on different types of learners in the classroom, he had not really thought about applying this knowledge to the adults with whom he worked. He felt that applying these understandings to adults has helped him to be more effective and tolerant in his interactions with them. Otherwise, he was somewhat disappointed in the program and felt it had not been very helpful. Ted stated sarcastically that, although important, developing an agenda is not the most essential skill for a teacher leader.

He stated that he was "constantly going to new district PDS's (professional development seminars) and workshops, to try to find whatever is helpful" (DI3-1, p.23) in an effort to add to and enhance his content and leadership skills.

The Case of Donna

Profile

The only participant teaching at the middle school level, Donna is a fifty-one-year-old female with twenty-one years of teaching experience who is currently teaching eighth-grade language arts. Her principal recommended her checking nearly all the characteristics of a teacher leader on her nomination form. Serving nineteen years at the same school, she has assumed many responsibilities and leadership roles: mentor, language arts lead teacher, department chairperson, team or grade-level leader, member of the school improvement team, and representative to the Superintendent's Advisory Committee. Donna added that she has also served on clinical faculty for student teacher supervision and has taken the lead in developing several special school functions, such as the annual Grandparents Day. Her analysis of her own skills and dispositions closely matches the checklist completed by her principal.

Even though she is the only participant who is not pursuing or has not earned a master's degree, she indicated that her formal training included some college and graduate-level coursework and professional development seminars and conferences, in addition to participation on school and district committees and other activities. As primary influences on her growth as a teacher, she listed only one – a school colleague.

Knowledge, Skills and Dispositions

The picture of a teacher leader as Donna painted it included the following descriptors: approachable, flexible, loyal, tactful, persuasive, trustworthy, patient, and competent in the subject matter. Moreover, Donna stated that a teacher leader is a good communicator, facilitator, manager, mentor, risk-taker. To be successful at all these jobs, Donna was emphatic that a

teacher leader must first and foremost have the personality and interpersonal skills. Being an expert in the subject matter is not enough. She explained, "If you want people to respect you, then you have to know what you're talking about, because people will know right away" (EI3-2, p.28); however, "you can have someone who knows everything – like the expert doctor – but if he has a terrible bedside manner, he won't be able to attract or keep his patients" (EI3-2, p.29). She felt very strongly that a teacher leader must be able to "attract bees with honey" (EI3-2, p.29); thus, she works hard to develop good working relationships so that her peers are not afraid to come to her. Then after colleagues are engaged, the teacher leader must be able to facilitate and share, not monopolize and demand. She insisted that "how we are with our students – that's how we need to be with our peers" (EI3-2, p.29) because most people will stay engaged if they are encouraged to take ownership of a task or project. Besides, she recognized that there were already so many other gifted language arts teachers at her school that the competence was already there; what she could bring to the group was her interpersonal skills to harness and direct their expertise. She was careful to ask for their opinions about their monthly meetings and moving them forward in accomplishing agreed-upon goals for the year.

Moreover, Donna contends that a teacher leader is never complacent; he or she is always anticipating "what's the next thing, what's the new thing that's coming down the road" (EI3-2, p.29), because a teacher leader is "constantly looking for new ways to do things to make it better, to reach different ones" (EI3-2, p.29). To this end, Donna considers that a teacher leader is obligated to attend professional development opportunities, learn how to use resources, and return to his or her school to share knowledge and skills with others. Sometimes a teacher leader must also nudge his or her colleagues along even when a new direction will be less comfortable for them. For instance, when a new textbook was being considered, many of Donna's colleagues wanted to continue with the current text because they had already acquired a number of materials related to that book. She had to convince them that another book was the better choice. Eventually, they agreed because they trusted her leadership. Teacher leaders are also volunteers. For example, Donna expects to mentor those whom she sees as needing her help, whether she has been formally assigned as their mentor or not. For example, when a long-term substitute was assigned to her department, she volunteered to help her, not just with the usual procedures and practices, but also with the actual teaching and planning. They planned together and Donna even taught the substitute's classes (as well as her own) so that she could model lessons for her. In

fact, Donna's impact was so great on this person who had had no training or background as a teacher that she decided to become a credentialed teacher herself crediting Donna with this decision. As a result of this experience, Donna said that her reward was that she had grown as a teacher leader herself. An additional reward for Donna is when those she helps appreciate her efforts, and she said, "I love it when you tell me I've done a good job" (EI3-2, p.30).

In her e-journal, Donna elaborated on this willingness to serve others, which she insisted must be accompanied by a mild temper and humility. A genuine willingness to serve extends to colleagues and students, whether mentoring a fellow teacher, presenting professional development seminars for colleagues, volunteering to help students after school, or sponsoring activities. But in doing so,

> humility is a necessary virtue as none of us are perfect, and in leadership roles we are scrutinized closely by our colleagues as well as our students and their parents. When we fall short, we need to accept responsibility for our errors and work to correct them. Just because we are leaders, we shouldn't become so high-minded and self-important. (EJ2-1, p.8)

Finally, Donna's e-journal reveals why a mild temper is an important characteristic of a teacher leader. "Everyday trying situations arise and handling them with a mild temper can make or break the situation. We can either gain or lose a student, parent, or colleague by how well we respond to their various needs" (EJ2-1, p.7).

Even with the satisfaction she feels in self-sacrifice to help others, Donna admits that a leader must prioritize to get everything accomplished. So during the weeks when she is feeling overwhelmed, she asks herself, "What's important now? What do I need to get done today, this planning period, or maybe this very minute?" (EP1, p.6) After reading Lou Holtz's *Winning Every Day* with her faculty, she created a WIN button (included in her portfolio) for herself and her colleagues to help them be more successful in addressing the myriad tasks inherent in teaching.

Situations and Opportunities for Leadership

As a prelude to her assignment as her school's lead teacher for English and as English Department Chairperson, Donna has participated in a number of activities that have helped to prepare her for her role. She has coordinated the Virginia Young Readers and the Accelerated Reader programs at her school, and she has served on the Instruction Committee, as well as the

school's leadership team. She has attended many professional development sessions and was selected to teach the Extended English 8 class at her school, for which she prepared by participating in several Pre-Advanced Placement seminars. She has also served as a mentor to new teachers in her building and is a member of *The Free Lance Star's* Newspaper in Education Advisory Board.

Principal. For these opportunities, Donna is appreciative of her principal, who has created a variety of committees to encourage faculty involvement and shared decision-making. "Our principal has assigned many different committees: team leadership, recognition for students, attendance . . . And those committees are wonderful because we all have input" (EI3-1, p.31).

School climate and environment. Donna considers these committees to be a vehicle for drawing colleagues closer together. The sunshine committee, as an example, functions to boost the morale of fellow teachers by remembering them in need and admiration. The committee also helps faculty recognize who has gone above and beyond in their service to the school. Another avenue for faculty recognition is the Friday Fish award, which Donna has won several times and describes with an artifact in her portfolio. This is accompanied by her school spirit badge because Donna considers it an important symbol of pride, and "As a teacher leader, it is of the utmost importance that I take tremendous pride in my school and our teachers, administrators, and students" (EP5, p.6). Donna feels strongly that building morale among peers and the children she teaches is a responsibility of a teacher leader.

Mentors. Donna did not acknowledge the influence of any particular mentor from the ranks of education. Her mentor appeared to be her experience, which she mentioned several times, and which has taught her to be patient and to budget her time, essential skills to the success of a teacher leader, according to Donna. In her portfolio she did, however, include a poem sent to her by her grandmother entitled "What Kind of Day Should This Be?" It represents the influence her grandmother had on her both personally and professionally. She also was the inspiration for an annual event at Donna's school, Grandparents' Day, which Donna coordinates.

Formal Training

Not having attained a graduate degree was not especially important to Donna's preparation for teacher leadership. She thinks that "more than educational background, the experience is important" (EI3-1, p.30). She also thinks that being a mother has provided her with

many of the skills and attributes necessary for her to operate as a teacher leader. An ardent participant in district professional development opportunities, she continues to hone her leadership skills and content expertise.

The Case of Reba

Profile

Reba is the oldest (58 years old) and most veteran of the participants in the study (34 years in education). Currently a high school teacher with a broad range of experience in the teaching of English (from middle to high school), including Dual Enrollment English and public speaking, she came highly recommended by her principal. However, she did not list her principal or any other administrator as having had a profound influence on her growth as a teacher. Instead, she noted only a school colleague and an educator outside the school district as having been influential. Her profile sheet indicates that she has served in every capacity listed, and she actually moved to a position of part-time district English Coordinator during the course of this study, a strong endorsement of her ability to lead other teachers. She possesses a master's degree in the teaching of English, unlike the other participants whose graduate degrees are in education. In terms of characteristics, she perceives herself to possess all of the qualities and skills listed on the profile sheet except courage.

Knowledge, Skills, and Dispositions

When Reba was asked to define a teacher leader, she emphasized the teacher part of the description first, not the leader component. This was a significant departure from the other participants, who began their interviews by discussing the leadership characteristics of teacher leaders. Reba remarked that a teacher leader is

> someone who has day-to-day contact with a significant number of students doing all the things that every other teacher in the building is doing related to that. That's the first thing. The second thing is that I see a teacher leader within a building as a person who doesn't wait to be asked to do whatever things need to be done in a building. (FI3-1, p.34)

Indeed, her understanding of a teacher leader is a person of action, a person who does things for others.

According to her, some of the things she does as a teacher leader include answering questions from a new teacher, stopping by a classroom when she sees somebody who looks as if

they've "had way too many hours in the job" (FI3-2, p.34) and offering moral support or a suggestion to make their lives easier. She makes sure colleagues know ahead of time what they need to anticipate on the calendar and takes the initiative to go looking for answers to questions that bother her, even when those queries mean going directly to the administration. These actions are consistent with being proactive, which Reba claims is a natural course of action for a teacher leader. She is not reticent in offering solutions and suggestions to administrators that might start with "We could do this a better way" (FI3-2, p.34). She also sees the importance of being aware of the people in the school who might not only learn from whatever she has to offer but who might also share an activity or idea with her.

Reba maintains that these relationships develop successfully primarily because of the credibility the teacher leader brings to his or her interactions with administrators and other teachers. In her e-journal, she writes about credibility that derives first from the classroom, where success is the result of

> depth of content knowledge; understanding, practice and repertoire of instructional skills; and knowledge and understanding of the development and learning processes of students. The classroom success provides the basis for the teacher to have some credibility with other teachers, and for that leader to establish appropriate instructional goals. . . . Maybe that's the key element for me, that teacher leaders are instructional leaders, not administrators of policies or managers of materials and time. (FJ2-3, p.10)

Reba's credibility was illustrated when she was observed chairing a textbook adoption meeting for the district high school teachers (March 27, 2005). More than being well prepared and organized, she was clearly able to direct and control the discussion and guide her colleagues in making decisions with tact and diplomacy. One of the ultimate examples of how credible Reba is with her colleagues is the Teacher of the Year plaque included in her portfolio. Her description of this artifact bestowed by her peers included the following: "There are very few opportunities for teachers to publicly acknowledge the good work of their colleagues, so knowing that my co-workers believed in my abilities was gratifying and motivational" (FP3, p.8). During this study, Reba's credibility was once again rewarded when she was promoted to Coordinating Teacher for English for the district; she taught two periods per day and came to the central office for the remainder of the day. In this capacity she saw her expanded role as a teacher leader as giving English teachers advice about instructional choices, giving information that will help them see

that they may have more choices than they had thought, and helping them evaluate how those choices impact what students learn and accomplish. Those choices might involve the suggestion or location of resources –electronic, people, or materials. Her new role requires developing relationships with administrators outside her own building. Although she feels more like a peer in her relationships with administrators, she remarked that determining how the hierarchy works is still difficult, and she is "not particularly astute in judging when people are straightforward, being honest" (FI3-2, p.33). Even when decisions are made at the building or central office level that have not included her input, she is obligated to do everything she can to help teachers be successful in carrying out those mandates.

As a teacher leader she has developed a sense of planning that reflects her understanding of the larger view of education beyond her own classroom. This broader vista includes a sharper sense of the finances affecting her job and sometimes a more critical view of educators and education in general. It also forces the issue of apportioning personal and professional resources. But Reba is adamant that none of what a teacher leader does is possible without first establishing his or her credentials as an instructional leader. She explained that these credentials are "absolutely imperative because . . . that's where their currency comes from in a lot of other places. If they're unsuccessful as teachers, then they lose their credibility when they take on other roles, even if they are capable" (FI3-1, p.34).

Situations and Opportunities for Leadership

Reba stated that some of her preparation for becoming a teacher leader came from her connection to the community at home and abroad. She belongs to a church where she works with several committees, and she has always belonged to social, quasi-service organizations where she has chaired projects that are related to community service and charity work. A certificate in her portfolio recognized Reba's participation with the Armonk Institute in developing an interdisciplinary curriculum to be used for study of post-World War II Germany that included a trip to Germany and a variety of meetings with political figures. At the state level, she has been a long-term member of the Virginia Department of Education Standards of Learning Content Review Committee and a member of the Virginia Association for Teachers of English (VATE). In her district she has delivered professional development seminars, served as department chairperson, and participated on numerous school and district committees. These kinds of opportunities to serve catapulted her into teacher leadership. Reba opined about those who refuse

to volunteer or accept an appointment to a committee, "Those who choose not to – I think that's a kind of self-selection out of becoming a teacher leader" (FI3-2, p.36).

Reba has gained greater perspective and additional experiences by choosing to teach at the high school and the middle school, as well as at the college level.

Principal. Besides creating formal situations, buildings and the way principals choose to use them can also facilitate informal mentoring that can be just as effective as creating formal situations that encourage teacher leadership. In her e-journal, Reba contrasted two school situations. In one school the physical placement of a single planning area was a natural opportunity for the English Department to practice collegiality.

> The exchange of ideas, questions, miseries, successes and failures automatically created opportunities for me to volunteer to lead or to follow, but to do so in a safe, supportive environment. I had no true appreciation of that daily exchange until many years later when I worked in a school where English teachers rarely saw each other in the course of a week, let alone on a daily basis. (FJ2-1, p.9)

School climate and environment. Most of the time, an understanding of school climate is tied directly to the actions of a principal. However, an artifact in Reba's portfolio suggests that she and some of her colleagues were the primary architects for construction of a sense of community at the school. At her high school Reba served as co-chair for the SACS (Southern Association for Accreditation of Colleges and Schools) school improvement process for her school's accreditation. A note from a colleague thanking her for her instrumental role in the process was a reminder of Reba's direction in creating the kind of school she "believed students should have," one that emphasizes respect and cooperation among all of its members, and one where "teachers can and do have strong voices in shaping the culture of a school" (FP3, pp.6-7). Of course, the principal appointed Reba to administer the process, but Reba's leadership clearly had an impact on staff collegiality and cohesion, an impressive feat for a new school.

Mentors. The assistance of mentors in Reba's development as a teacher leader was acknowledged in Reba's e-journal. In the summer before her third year of teaching, she taught in a summer session with some teachers who had a profound impact on her. Not only did they demonstrate better ways to plan and present lessons, they also encouraged her to join the local teacher association and VATE. These memberships began a career-long involvement with a host of activities and committees for curriculum revision and textbook adoption. The importance of

mentors is further explored in Reba's portfolio that included a canvas bag given to her by one of her mentors. She noted that she modeled herself after this mentor and other teachers, learning from their work ethic, involvement in the total school program, courage to question instructional practices, and shared successes and failures.

Another mentoring experience detailed in her portfolio revolved around a little box with a key inside given to her by her first student teacher. Although the box displayed the words "To a special teacher," Reba revealed that, in fact, her student teacher had been the real teacher and mentor because she had learned so much from supervising her. For example, her student teacher had introduced her to the term "reflective practice." This experience motivated Reba to take additional classes, attend conferences and workshops and maintain professional affiliations. Ten years later another student teacher taught her the joy of teaching and the power of laughter, and once again Reba was reminded of the importance of staying current in her practice and professional growth.

Formal Training

Reba's master's degree in the teaching of English has provided a firm foundation in content expertise and opened doors to extend her opportunities for leadership and growth. She has taught a methods class for college freshmen at the local university and dual enrollment English. These situations and her affiliations with various organizations have also widened her professional network affording her opportunities for "listening carefully to and valuing the ideas of others" (FJ2-2, p.10). Additionally, Reba has taken advantage of many opportunities for inservice, including attendance at conferences and workshops. She was clear about their value when she wrote in her e-journal that

> school systems should support teachers with time and money to allow their participation in content areas and other professional organizations. The journals, conferences, and opportunities to meet positive teachers have been significant in causing me to stay reasonably current in my practice. Being involved in professional groups is energy creating in that each activity makes clear what needs to be done and provides some direction for doing so. (FJ2-1, p.9)

This multi-faceted approach to formal training as a teacher leader has been mostly self-directed but comprehensive. As Reba reflected in her e-journal, "It isn't enough to be doing things right, you must be doing the right things" (FJ2-2, p.10).

Compilation of Data across Case Studies

Once all the data had been recorded and coded for each individual participant, then those data were examined and coded across the six cases. Each type of data was examined across cases beginning with the participant profile sheets and the nomination forms completed by their principals or supervisor. A summary of those types of data follows.

Survey Data: Participant Profile Sheets and Principal and Supervisor Nomination Forms

How the participants saw themselves and the way their nominators saw them are very closely aligned. Based on the nomination forms and profile sheets and (Appendices A & D), the characteristics of the participants as they perceived themselves and the descriptions completed by their nominators are summarized in no particular order below:

1. All participants saw themselves as life-long learners, servant leaders, collaborators, flexible, patient, positive, and persevering.
2. All of the nominators saw all of the participants as content experts, servant leaders, collaborators, and motivators. All the participants were described by their nominators as organized, flexible, positive, courageous, persevering and patient. Moreover, they all indicated that all participants possessed a global view of education and were seen as leaders by their peers.
3. The characteristic least noted by participants (three of six) was "courage." The characteristic least noted by their nominators (two of six) was "active in community or political organizations."
4. All participants had served as mentors to new teachers or other colleagues, and five had served on clinical faculty at the local university supervising student teachers.
5. All participants had served as department chairpersons and/or team or grade-level leaders.
6. All participants had served on their school improvement committees.
7. All participants had served, or were serving, in formal roles of leadership. These included math, English, social studies, or science lead teacher; county government committee member and candidate for local office; Instructional Support Teacher; school and district staff developer; and school program director.

8. Only one participant served as a specialist with no assigned student load; however, four of the six nominators saw their nominees as specialists.
9. Only one participant did not see herself as a content expert, possibly because she is a special educator. New to her role, she also did not see herself as having a global view of education or being particularly organized or courageous. Nor did she describe herself as a change agent or a motivator. She also did not think she was necessarily seen as a leader by her peers.
10. Four of six participants indicated that they were active in community or political organizations, and four of six considered themselves to be change agents in their roles as teacher leaders.
11. None of the participants indicated that any member of the community outside education had influenced his or her professional growth; however, all but one reported that a school colleague had been an important influence.
12. Two participants indicated they had been influenced by central office administrators in their growth as teacher leaders, while four indicated that a principal or assistant principal had had some influence on their development. Two indicated that an educator outside the district had influenced them.
13. Four of six participants indicated on the profile sheet that they had engaged in networking via professional organizations.
14. All but one participant indicated that they had received some formal training via college coursework and professional development seminars and conferences. All but one also noted that they had participated on school and district committees and in other related activities.
15. Five of six participants indicated that they had taught on several grade levels.
16. The average age of the participants was 46.2 years, and their ages ranged from 36 to 58 years.
17. The participants' total years of experience in education ranged from seven to 34 years. Their average length of experience was 16.5 years; their average length of experience in the district was 11.5 years; and the average length of experience in their school was eight years.

18. All of the participants had worked in other schools and/or districts prior to their current assignments.
19. There were five female participants and one male, and all were Caucasian. Three were currently teaching at the elementary level, one at middle school, and two at high school. Five were classroom teachers and one was a resource teacher. There were two English teachers, one social studies teacher, one math lead teacher, one science lead teacher, and one special education teacher.

It is important to repeat that this summary relates only to the descriptive data collected from the participant profile sheets and the nomination forms submitted by principals and supervisors. Additional data were collected from four other sources, and sometimes those data do not match those represented in the profile sheets and nomination forms. For example, during interviews, e-journal responses, and portfolio reflections, participants who had not indicated that they were affiliated with other professional organizations revealed that they were members of subject area councils or educational sororities. Therefore, these additional data collections elaborate and expand the survey data and are summarized in the following section.

Summary of the Data Coded to the Major Themes of the Conceptual Model as Reflected in Interviews, E-journals, Portfolios, and Observations across Case Studies

The data derived from the interviews, e-journals, portfolios, and observations were categorized according to the major themes of the conceptual model and further subcategorized based on repetition of data across all six case studies.

Knowledge, Skills, and Dispositions

Within this general theme, data fell into 37 subcategories presented in Table 6. These categories represent what the participants said in their interviews and in their e-journals, what was observed about them as they engaged in a leadership activity, and the artifacts and accompanying reflections included in their portfolios. The data represent what the participants expressed and exhibited as a means of defining themselves and others as teacher leaders.

Table 6

How Participants Defined a Teacher Leader

	Fran	Holly	Lucy	TED	Donna	Reba
Content expert	√	√	√	√	√	√
Effective communicator, articulate	√	√	√	√	√	√
Organized	√	√	√	√	√	√
Confident	√	√	√	√	√	√
Life-long learner	√	√	√	√	√	√
Reflective	√	√	√	√	√	√
Mentor	√	√	√	√	√	√
Collaborator	√	√	√	√	√	√
Sees mission as improving/enhancing student achievement	√	√	√	√	√	√
Concerned about greater good of school and/or department	√	√	√	√	√	√
Committee member	√	√	√	√	√	√
Supportive	√	√	√	√	√	√
Involved in total school program	√	√	√	√	√	√
Belongs to several professional affiliations	√	√	√	√	√	√
Encourages and acknowledges contributions of others	√	√	√	√	√	√
Builds effective relationship with administrators	√	√	√	√	√	√
Goal-driven	√	√	√	√	√	√
Manages time and sets priorities	√	√	√	√	√	√

Table 6 (*continued)*

Realistic, practical	√	√	√	√	√	√
Well-prepared	√	√	√	√	√	√
Conduit for disseminating information and resources	√	√	√	√	√	√
Controls agenda	√	√	√	√	√	√
Trusted and trusting	√	√	√	√	√	√
Possesses excellent interpersonal skills	√	√	√	√	√	√
Has ability to set boundaries	√	√	√	√	√	√
Good planner	√	√	√	√	√	√
Action-oriented	√	√	√	√	√	√
Risk-taker	√	√	√	√	√	√
Builds rapport	√	√	√	√	√	√
Maintains regular contact and professional dialogue with peers	√	√	√	√	√	√
Change agent	√	√	√	√	√	√
Role model	√	√	√	√		√
Broadly (not necessarily highly) educated or experienced		√		√	√	√
Provides professional development	√	√	√		√	√
Has big picture/global thinker	√	√			√	√
Researcher	√	√	√			√
Advisor	√		√	√		√
Manager	√		√	√	√	

There was a great deal of agreement among the participants as to the roles, knowledge, skills, and dispositions required of teacher leaders. Of the 37 subcategories of traits, participants were unanimous in their generation of 30 of those traits. The remaining seven traits demonstrated agreement among four to five participants for each trait.

Knowledge. According to the participants, an absolutely essential component of a teacher leader's profile was demonstration of content expertise. Fran described this knowledge as "deep understanding of content" (AI3-1, p.3), while Holly described it as a "lot of instructional background" or being "expert" (BI3-2, p10). Donna agreed with them, and used the terminology "knowledge of content" (EI3-2, p.30). Lucy, Ted, and Reba stated that a teacher leader was first a great teacher – described by Lucy as an expert in content and pedagogy, by Ted as being the best classroom teacher, and by Reba as an instructional leader who was a good teacher first. This expertise could not develop solely as a result of attaining advanced degrees and attending seminars, workshops, and conferences. Both Holly and Donna asserted that graduate degrees and higher education were not necessarily important, and, as Ted repeated several times, practical experience more than the theoretical concepts was most important. Experience included not only that gained in the classroom and across grade levels but also, as Holly noted, being "broadly educated" (BI3-1, p.11) with multiple interests in real life. Four of these participants (Fran, Holly, Ted, and Reba) underscored the role that expert content knowledge played in developing their credibility and inspiring confidence in their leadership among their peers. Without earning credibility, teacher leaders could not be effective.

Skills. Aside from teaching expertise, teacher leaders need to develop some necessary skills outside the classroom. All participants agreed that being a good planner and being organized were important skills. On one level these skills are learned in the classroom, but being a teacher leader requires an advanced application of planning and organization because teacher leaders are planning and organizing their classrooms at the same time that they are planning and organizing school and sometimes district, regional, and state workshops and events. Good planning is also essential when attending to deadlines, disseminating information and materials, and acting as liaison between administration and teachers – some of the dual responsibilities described by all participants. These managerial obligations include managing a school's math manipulatives, making the departmental schedule work, overseeing events, reading and understanding a budget, and other day-to-day functions. Nowhere would lack of good planning

and disorganization be more apparent than in the delivery of professional development, which all but one participant saw as being a vital role for teacher leaders.

According to all the participants, good planning and the ability to organize resources contribute to a teacher leader's being well prepared, no matter what the activity. Evidence of preparedness was illustrated by all the participants when conducting meetings. Each had learned not only to develop agendas, but also to control those agendas so that meetings were efficient and effective. Maintaining regular contact with peers either through meetings and/or professional dialogue was also considered a duty of all the participants.

Working with others forces teacher leaders to develop and hone additional skills: communication, mentoring, collaboration, and building rapport. All of these skills are practiced to one degree or another when working with students in a classroom, but participants indicated that working with adults is different. Communication involves more than just learning to speak in front of groups; it also involves crafting a message and adapting the delivery to fit the individual and the situation. For example, Ted talked about having to be straightforward and frank when advising a peer, or even an administrator, who may not want to hear the truth. All participants not only talked about the need for effective communication skills, they demonstrated them during observations of them engaged in leadership activities.

Acting as a mentor to teachers new to their schools had been a responsibility for all participants, and this job required them to exercise myriad skills. All participants had been selected for training by the district's CAMP program or the local university's student teaching program. These and skills learned through experience prepared them to be role models and frequent advisors. As Ted stated, teacher leaders are nurturers.

Naturally, teacher leaders are collaborators, a role developed through practice and necessity. All participants were adamant that this was a role of paramount importance for all teacher leaders; Holly even suggested that teacher leaders "actively seek to collaborate" (BI3-1, p.10), implying that it was an inherent trait, not just a learned skill, of a true teacher leader. Donna claimed that collaboration is synonymous with "good working relationships" (EI3-2, p.30) and is initiated by teacher leaders purposefully, "to bring people together to work together" (DI3-1, p25), as Ted stated. An important ingredient in effective collaboration is the teacher leader's ability to develop rapport with various stakeholders, and all participants saw the need to build camaraderie and form relationships

But rapport results from work, not just a charming personality, and is necessary when interacting constructively and effectively with groups or individuals – peer, parent, or principal, the latter emphasized by all participants. Every participant was cognizant of the need to create an effective working relationship with principals: Fran stated that she had to work with her principal to develop school goals; Holly spoke of sharing decision making with her principal, whom she described as a role model for her; and Lucy gave examples of times when her principal and assistant principal trusted her leadership enough to leave the building in her care, and she was observed comfortably sharing leadership with her principal in a meeting; Ted had learned when to approach administration and what issues to push and that he "owes administrators loyalty and respect" (DI3-2, p.24), even when he doesn't always agree with their decisions or when he is unsuccessful when advocating on behalf of his peers; Donna was complimentary of her principal's efforts in creating structures to encourage teacher involvement in decision-making and building a positive school climate; and Reba "felt more in a peer relationship with principals" (FI3-2, p.34). There were numerous illustrations of situations that reinforced the participants' skill in building rapport with administrators. Nevertheless, even the most positive of relationships was tempered by the understanding of the teacher leader's place in a hierarchy, which was sometimes difficult to understand and navigate, according to Reba. Five of the participants were very aware that they were not administrators.

Partly because of these relationships with principals and the opportunities to learn and collaborate outside their school buildings, all participants talked about having developed a wide-angle lens that had expanded their perspectives. Every participant indicated that he or she now acted with a concern for the best interests of the school and/or department in mind. Fran referred to the role of a teacher leader as one who has the big picture and who is a global thinker. Holly said that she now had become aware of the "behind the scenes stuff" (BI3-1, p.12) that she wouldn't have known about as classroom teacher and that she now thinks more broadly and globally. Donna spoke of the need for a teacher leader to "see the big picture" (EP5, p.6), while Reba stated that she had developed an "understanding of a larger scope" (FI3-2, p.33). Even though their own students came first, every participant demonstrated a level of involvement inside and outside their schools that indicated their commitment to addressing the needs of all students. Whether formulating curricular and instructional plans, sharing strategies and information with other teachers, providing professional development or serving on committees,

they had all stepped through the door of their own classrooms and into a bigger arena of service with a mission to improve or enhance all students' achievement.

In expanding their responsibilities and the obligations they felt to their own students, their peers, administrators, schools, and district, all participants had learned to manage time, establish priorities, and set boundaries. These were skills that all of them continued to grapple with. Fran lamented a lack of time to do all the things she would like to do for her peers but knew she had to set boundaries in helping her to know "how much you can take on" (AI3-2, p.4). Likewise, Holly found it difficult to say "no," and to draw the line in terms of her job responsibilities and to whom she would ultimately have to answer. Lucy had discovered that a teacher leader had to honestly evaluate his or her strengths, weaknesses, and limitations and not try to be everything to all people. Ted added that he had to be realistic in supporting his peers who often came to him for validation that he could not ultimately give or demands that he could not satisfy. Donna also emphasized budgeting her time and establishing priorities among all the tasks she faced, and Reba found balancing the quality of instruction for own students with her leadership responsibilities as exhausting and uncomfortable. Although less cerebral than curriculum development, these skills were essential to the success of a teacher leader because they involved compromise between what was possible and what was realistic, standing on the bridge between their peers and administration, balancing the scale between personal and professional life, and apportioning time and resources among a number of deserving entities – all requiring tough decisions that might affect their ability to be credible and collaborate effectively.

Dispositions. Skills can be learned through training and experience. However, many dispositions are more often associated with inherent qualities and personality traits already present in teachers that predispose them to leadership and enhance it once they have assumed the role of leader. The participants in this study generally referred to dispositions as interpersonal skills with a subset of characteristics including the following: confident, flexible, tolerant, mild-tempered, patient, respectful, enthusiastic, positive, creative, action-oriented, humble, approachable, empathetic, supportive, honest, adventurous, motivated, reflective, trusting and trusted.

All of the participants indicated that a teacher leader must be confident or self-assured and even inspirational. This confidence might derive from feeling comfortable in what they are doing or feeling empowered. For several of the participants, this confidence was revealed in their

commitment to do their best and, according to Reba, their desire not only to "do things right, but do the right things" (FJ2-2, p.10). Two of the participants' confidence was related to having developed a strong instructional philosophy and having been deliberate in their thinking, carefully connecting the strategies they modeled and the information they shared to results and research. Indeed, four of the six participants discussed the need for teacher leaders to be familiar with the research and to read voraciously to stay current in their fields. They all provided evidence of being life-long learners who, as Holly described them, are seekers of "intellectual challenges" and "constantly willing to learn more" (BI3-1, p.12). All the participants had earned or were pursuing graduate degrees and/or were constantly going to new professional development seminars and workshops. Some had earned or were working on addition certifications and endorsements beyond a master's degree, while Donna described herself as never being complacent and always exploring the "next thing to come down the road" (EI3-2, p.29). She added that she was growing and becoming sharper as a consequence of her role as a teacher leader.

Certainly, confidence was helpful to participants who felt they had to lead by example, be a role model for their peers, be willing to model strategies for other teachers, and "practice what they preached." Participants also exhibited confidence as risk-takers who were willing to rebel against, as Fran said, "being driven by someone else's theory on how to find the short cut to improve scores" (AP3, p.1). Like Holly, they were not "bound by conventional ways of doing things" (BI3-1, p.11). Risk-taking might also involve trusting instincts as well as trusting others. For example, Holly stated that sometimes a teacher leader "lays the groundwork and trusts that their [other teachers'] passion will move it forward" (BI3-1, p.10). Similarly, Ted, as the head of the Long Range Planning Committee, had to delegate duties and trust that his colleagues would follow through. Observations of Fran (December 6, 2004), and Lucy (April 28, 2005) as they conducted meetings revealed that the other committee members deferred to their leadership, an indicator of their trust and confidence in them as teacher leaders. Confidence and trust played a part in participants' being approachable, too. Fran stated that people came to her for advice and strategies, Ted described himself as being accessible, a person that his peers felt they could go to and just "blow off the steam" (DI3-1, p.24) knowing that he would be discreet and not betray their confidences. Donna described herself as approachable because she adopts a welcoming demeanor. In fact, all the participants stated that one of the jobs of a teacher leader is to clarify

information, offer advice, and answer questions, but to accomplish these tasks they must be approachable.

Beyond confidence and trust, some personality traits helped to draw their peers to them. Fran and Lucy specifically noted passion and enthusiasm, and Holly even went so far as to describe a teacher leader as somewhat obsessed in his or her commitment to work. She added that a teacher leader must be energetic and inspirational to motivate others. Fran agreed that a teacher leader must be highly motivated herself if she wished to promote and encourage her subject matter.

These are the traits of teacher leaders that contribute to their being action-oriented, as evidenced by all the participants' actions and words. Observations of them engaged in leadership, in addition to their descriptions of the artifacts in their portfolios, were particularly revealing of the wide range of events and activities that involved them. Self-sacrifice and servant leadership were recurring themes at school and in the wider community. They revealed no instances where they had to be forced to assume a responsibility or job. In fact, both Ted and Reba insisted that sometimes teacher leaders must be proactive in their planning or dealing with faculty. One example was offered by Ted who focused on getting to know his staff so that he could predict their needs or their reactions to directives and respond accordingly. Reba agreed that "knowing the people in your building who might learn from whatever you've done" (FI3-2, p.34) was important not only in sharing expertise but in avoiding instructional deficits that might arise because of a faculty member's lack of experience or training. Many times teacher leaders actually initiated proposals and developed programs because, as Reba stated, "A teacher leader doesn't wait to be asked to do whatever things need to be done" (FI3-1, p.34).

All the participants in this study were goal-oriented; their intentions were focused and purposeful. For example, Fran felt a responsibility for moving a group forward; she has committed to "make a difference" (AI3-2, p.3). Holly said that a teacher leader takes action; he or she doesn't just talk about doing something. "It's not telling what you can do; you have to go in and do it" (BI3-2, P.10). Furthermore, a teacher leader follows through and follows up. Teacher leaders are problem-solvers and multitaskers, she added. Ted thought that teacher leaders were constructivists who offer solutions, not just complaints. They are "constantly looking for new ways to improve things" (EI3-2, p.29), Donna added; they take the initiative in addressing issues. Reba indicated that teacher leaders are hard workers who are not intimidated

by difficult or unsatisfactory situations and offer their help to peers and administrators saying, "We could do this a better way" (FI3-2, p34). The participants saw themselves in four of the six cases as change agents (effecting change, albeit slow and sometimes minor), influential, and persuasive.

As a result, all participants were deeply involved in the total school program in their buildings, taking an active part in school governance, extracurricular activities, and schoolwide events. Donna felt strongly that building morale among staff and being loyal to the school are a teacher leader's duty, and she should be instrumental in creating a positive school climate. These teacher leaders also proved to be active members of a wider educational network maintaining affiliations with a variety of professional organizations such as ASCD (Association for Supervision and Curriculum Development), IRA (International Reading Association), Delta Kappa Gamma, and VATE (Virginia Association of Teachers of English).

Having charisma and personality account for a measure of a teacher leader's success, according to all the participants, and they are manifested in these qualities. Fran valued patience, flexibility, tolerance, and a sense of humor. Holly also spoke about flexibility, and being open-minded, humble, positive, and supportive. Lucy echoed the need to be flexible, supportive, humble and positive and added that a teacher leader must also be inclusive, respectful, fair, considerate, and honest. Ted agreed that respect, fairness, a positive attitude, and acceptance of others were essential dispositions, along with empathy. He also emphasized that a teacher leader needs to be nonjudgmental and diplomatic. He frequently described a teacher leader as needing to be a politician. Donna specifically mentioned flexibility, humility, tact, patience, a positive attitude, and a mild temper. And Reba reiterated that a teacher leader's success depended in part on exercising respect, tact, diplomacy, moral support, and cooperation. One of Donna's comments sums up a teacher leader's personality: She must want to "go above and beyond" (EP3, p.6).

For the participants in this study, a teacher leader is a people person. Their interviews, demonstrations, e-journal responses, and portfolios provided ample evidence of how they had become leaders among their peers. They all recognized the power of collaboration and were quick to allow others to speak, take suggestions, ask for input, and validate opinions; and they were always genuine in acknowledging the contributions of their peers. They were eager to share their knowledge and expertise, but Fran added that a teacher leader is also "not worried about

ownership of an idea as long as the work gets done" (AI3-1, p.3). Lucy and Reba indicated that a teacher leader is never threatened by using others as resources or asking them to share a lesson or strategy.

Tolerance is essential to a teacher leader's effectiveness. Fran talked about being tolerant of others' fears; Holly defined tolerance as being able to open one's mind to other perspectives and ways of accomplishing objectives; Lucy described tolerance in terms of inclusion, inviting everyone to the table, even those who are difficult; and Ted discussed tolerance as the willingness to be accepting of others and patient with their idiosyncrasies and negative attitudes. Humility also goes a long way in endearing a teacher leader to his or her peers. For Holly, a teacher leader is one who views her role as simply doing her job and has felt a little embarrassed when praise has been heaped on her. Lucy demonstrated humility when stating, "The more I know the more I realize I need to know" (CJ2-3, p.5). And Donna warned that teacher leaders must never present themselves as "high-minded and self-important" because even leaders are imperfect (EJ2-1, p.8).

In short, teacher leaders are considerate of their peers and make them feel as if they care about them personally and professionally. Donna offered a fitting analogy: A doctor may have all the training and expertise available, but if he has no bedside manner, he will not attract patients nor keep the ones he has.

Finally, one trait that all participants shared that had enabled them to grow professionally and personally is self-reflection. Lucy suggested in one of her e-journal entries that self-reflection is not a skill that can be taught. Some people are naturally introspective, as these participants illustrated, and value opportunities to look within, self-evaluate, and critique responses to situations and people, because they wish to grow as leaders who are as adept in dealing with their peers as they are in instructional expertise.

Situations and Opportunities for Leadership

There were essentially three categories of situations and opportunities described by the participants: those from their immediate community, those from a wider educational community, and those provided or available at their own schools. All participants were not only active in their schools, they were also active in their communities, and these experiences contributed to their growth as leaders, enhanced their leadership, and offered venues for practicing their leadership with other adults.

Fran actually came to teaching later than the typical college graduate and had had employment experience in the private sector, and she mentioned that she had worked as an assistant to the Scout leader in her neighborhood. Holly's outside interests were varied. For instance, she started her own business for designing and selling jewelry and had become proficient in hiking and climbing. She indicated the former was a creative outlet for her and the latter had prepared her to "lead a troop as a good team-building activity to make some climbs with teachers" (BI3-2, p.13). Lucy noted that she was the secretary of a regional chapter of Delta Kappa Gamma, a national association of women of excellence in education. Ted was deeply involved in the political arena in his county having run for political office twice and serving on several county committees. Donna had enjoyed a long tenure on the Newspaper in Education Board of Directors for the local newspaper. And Reba indicated that she had been involved in chairing a number of church committees, and she was a member of several social/service organizations related to community service and charity work. Two themes are common to all these situations: All proved to be outlets for another kind of leadership and all were service oriented.

In the wider education community beyond their schools, all participants had engaged in numerous opportunities that also challenged their leadership skills. Fran was the math lead teacher for her school and as such had the opportunity to meet regularly with other math lead teachers from around the district. This responsibility also positioned her to be selected to serve on the steering committee for the district's math textbook adoption and to be a teacher trainer on the district's rubric report card committee. She had also been encouraged to be part of the math leadership training, which led to opportunities to deliver professional development to principals as well as her peers. In addition, she talked about the honor she felt in representing her district by presenting at state and national conferences, from which she also had learned a tremendous amount. Likewise, Holly served as the science lead teacher and enjoyed some of the same opportunities for growth as Fran. She had also been instrumental in collaborations with the elementary education coordinator in implementing Understanding by Design and developing a math curriculum at the district level. Lucy had been given an enormous opportunity for leadership when the special education supervisor for the district selected her to be the IST coordinator for her school. She was also asked by the district supervisor to present professional development at the district level on assessment for special needs students. In addition to serving

as lead teacher for social studies representing his school at district meetings, Ted had been tasked by the social studies coordinator with arranging the Student Government Day, a partnership between the school system and the county government. He had also been appointed by the Commonwealth to serve on a commission for civics education. Like Fran, Donna had also served on the steering committee for English textbook adoption and had been selected by the English coordinator to serve on a district curriculum committee to develop a new course, Extended English 8. In preparation for this course, she was selected to be trained in Pre-Advanced Placement strategies and curriculum. She was also a presenter of CRISS (Content Reading in Study Systems) after having been trained by national consultants, and she presented professional development on the use of technology as a result of her certification as a technology lead teacher. Lastly, Reba had done extensive work with the Virginia Department of Education related to work on the Standards of Learning, taught Dual Enrollment English in a partnership with a community college, taught a course for preservice teachers at the local university, and in the second half of this study was hired as a part-time English coordinator for the school district. All of these activities involved these teacher leaders working on projects or in leadership capacities outside their own buildings.

Principal. The participants initiated some of the leadership situations and opportunities in their own buildings, and some were the result of structures provided by the principal and/or the principal's support. At Fran's school the principal gave support to activities she had initiated including the St. Jude's Mathathon, Excited about Math Days, and a weekly student math problem posted on the morning announcements. Holly's principal essentially gave her carte blanche in designing a program to meet the needs of students who were not being adequately served as part of the regular school reading program. This was a mammoth undertaking involving the training of parent volunteers and other teachers and using special materials and techniques. For her colleagues, she also created a manual to facilitate their use of a packaged curriculum program. Lucy's principal and assistant principal encouraged her to chair some of the school's IEP meetings, run school assemblies, and provide opportunities for her to talk in front of the faculty. Her principal also agreed to a plan for Lucy to go into other teachers' classrooms to model strategies for them and their students. At his school, Ted served as social studies department chairperson and was appointed to the school's block scheduling committee, both at the principal's direction. With her principal's approval, Donna created an annual Grandparents'

Day at her school, and she coordinated the Virginia Young Readers and Accelerated Reader programs. She also served on the School Leadership Team at the request of her principal. Lastly, the principal of Reba's former high school had appointed her as department chair for English, and the principal of her current school had asked her to co-chair the SACS Review for the entire school, both impressive in terms of their requirement for strong leadership. All the participants were also involved in sundry other leadership roles in their schools.

School climate and environment. As important as it was for their principals to provide leadership opportunities, as well as support for initiatives brought to them by teacher leaders, the overall climate of the school, the establishment of a nurturing environment for collaboration and leadership, was equally important. These teacher leaders considered principals to play a key role in creating and maintaining a school culture amenable to their involvement and success as teacher leaders. They claimed that principals must possess certain professional and personal skills and attitudes if they wished to develop cohesive and caring school communities where teachers could flourish as leaders. Fran described her principal's open-door policy, which made her (and others) feel as though she could go to her for support and advice whenever she needed it. She felt that in order for her to be effective as a math lead teacher, she needed to work along with the principal in setting instructional goals for math. It was important for a principal to share his or vision and let the teacher leader know what was expected at the building level. And it certainly didn't hurt if the principal shared an interest or expertise in the teacher leader's specialty subject area. Developing a professional rapport with her principal and her math supervisor was critical because at times she was the go-between for the central office and the school, and working with the principal required some compromise.

Reflecting that "Some principals can be very cheerful and collaborative and happy" while others could be "downright cranky" (BI3-1, p12), was a point made by Holly, who implied that the personal characteristics of a principal held weight in determining a productive and pleasant work environment for teacher leaders. She was also concerned that some teachers are "perceived as leaders but everyone doesn't want to follow them" (BI3-1, pl12). "They can be people who factionalize groups" (BI3-1, pl8), a warning to those selecting teachers for leadership positions to choose wisely. This admonition was repeated by Ted, who suggested that principals should be discerning in promoting some teachers into situations for leadership because "some individuals will be leaders of a climate of negativity and complaining" (DJ2-3, p.6).

Lucy praised her principal for being "very good about kind of bouncing things off of and treating me like a colleague" (CI3-2, p.21). Ted agreed that rapport also included being able to go to a principal in trust and without the fear of reprisal and say, "Now, I don't want anything to be done about his; I just want to vent" (DI3-1, p27). Lucy was also appreciative of her principal and assistant principal who were supportive of her leadership, lobbying for her with central office supervisors. Likewise, Donna was grateful for her principal's attempt to encourage teacher input in a variety of ways.

Lastly, principals have to be trusting when relinquishing some control to a teacher Leader as evidenced by Reba's principal, who entrusted her to take major responsibility for leading the staff through the very important process of school accreditation.

Ted summed up the effect of a principal on teacher leadership by insisting that "the principal creates or fosters an environment where teacher leaders are nurtured and/or encouraged" (DJ2-3, p.7).

Nevertheless, all the participants in this study were aware of some of the pressures that affected a principal's support of teacher leaders. For instance, Fran admitted that she had come to understand that sometimes she didn't get the follow-up from her principal that she would have liked because, after all, "mathematics was not the only thing on her plate either!" (AI3-2, p.6) Furthermore, she realized that some things are negotiable and some things are not. Lucy was also cognizant of a political context within which principals must work, and all participants realized that there was a hierarchy at the school level and at the district level, and all participants were clear where they stood within that hierarchy.

Mentors. Little evidence indicated that the participants had had a mentor who encouraged them directly or impacted them greatly. There were some exceptions, though. Both Fran and Holly had developed a bond with the math supervisor and the elementary education coordinator respectively at the central office, who had afforded them many opportunities for leadership and had nurtured and guided them. Additionally, Holly spoke about her principal as being a valuable role model. Lucy spoke of the professional relationships she shared with her building administrators and the opportunities given to her to practice her leadership. Reba was effusive in her depiction of classroom teachers early in her career who had set the bar for excellence by introducing her to professional organizations and modeling excellence in teaching and involvement on instructional committees. Donna mentioned that her grandmother had been an

influence on her professionally and personally, and Ted spoke about a fellow teacher who modeled professionalism and made herself available to him for advice and support. Otherwise, there was surprisingly little elaboration on the impact of formal mentors on these teacher leaders. On the other hand, all the participants had acted as both formal and informal mentors throughout their careers for new teachers to the profession and the district.

Formal Training

Data collections and discussions regarding the training of the teacher leaders in this study were less fruitful than those related to their suggestions for the training of the next generation of teacher leaders. Their own training was more haphazard than planned, and there was little preparation for exercising leadership among their colleagues.

Participants' own training. In terms of formal, targeted inservice that had prepared the participants for their roles as teacher leaders, only one training experience was common to all, and that was training to be a mentor to new teachers to the district via the CAMP program. All had attended conferences and other district professional development seminars related to instruction, which all had agreed was necessary for teacher leadership, but none of that was specific to leadership skills. Only one participant, Ted, had participated in a certificate program offered by the local university specially designed to develop or enhance the skills of teacher leaders. Fran was earning a certification to become a math specialist and had received training particular to leadership skills via an Exxon Mobile grant. Holly was earning an administration and supervision endorsement which included some attention to leadership, but it was geared as preparation for administrators. Although all but one of the participants had earned or were in the process of earning master's degrees, all admitted that those graduate programs offered no specific preparation for teacher leadership. Furthermore, before entering the field, all stated that none of their preservice training contained any mention of the topic of teacher leadership. Lucy stated,

> When I look back at my teacher training, we did not spend any time discussing the importance of being teacher leaders. Therefore, although I have my own ideas of teacher leadership, I have never been afforded the opportunity to discuss the concept and develop a philosophy of teacher leadership. In retrospect, I don't believe prior to our meeting did I distinguish between the difference of an effective teacher and a teacher leader. (CJ2-1, p.5)

Participants' proposals for training. The participants, however, were clear about the kind of preparation for teacher leaders they thought was necessary. These suggestions came as a result of their own learning-by-doing experiences and closely aligned with the three major components of the conceptual model for teacher leadership (see Figure 1). Table 7 represents the topics suggested by participants that should be included in teacher leadership training.

Table 7

Participants' Suggested Topics for Inservice

	Fran	Holly	Lucy	Ted	Donna	Reba
Working with adult learners	√			√		
The psychology of change	√	√	√	√	√	√
Deep content preparation	√	√	√	√	√	√
Active listening skills	√		√			√
Chairing a committee	√		√			
Awareness of personality types and learning styles in adults		√		√		
Written and oral communication skills			√			
Models of collaboration	√		√			
Presentation techniques				√		
Politics of leadership			√			
Time management			√	√	√	
Long-term planning and timelines				√		√
Interpersonal skills			√		√	
Mentoring			√			
Establishing assessments and Interpreting data	√		√			
School finance			√			
Problem solving			√			

Working collaboratively with people in general and with adults in particular was a recurring theme. As Fran stated, "Adult learners are just such a different breed" and if "the goal is to help effect change in practice and belief, then training in and support in learning about working with adult learners would definitely be helpful" (AI3-2, p.1). She elaborated on this need by saying,

> I think in order for teacher leaders to be effective, we must have more training on working with adult learners and how to help teachers become vested in whatever we are proposing. Even further, if our mission is to be an agent of change or improvement in our buildings, professional development dealing with the psychology of change would be helpful. (AJ2-1, p.2)

Holly agreed that "the spectrum of people is wide" (BI3-2, p.8), and Ted's suggestion to help teacher leaders become more effective in working with adult learners involved "reading your audience, knowing your audience" (DI3-1, p.22). According to him, one way to address this skill was to administer the Meyers Briggs Inventory to better understand different types of learners and personalities. Donna, who was emphatic about the importance of interpersonal skills, noted that teacher leaders need to be able to "get along well with others, know how to facilitate and share and not just make demands" (DI3-1, p.28) of their colleagues. However, expertise in the affective domain, was not something that she felt could necessarily be taught. Lucy also wanted some emphasis on the necessary interpersonal skills to be included in teacher leader training and suggested that learning about a variety of collaboration models might increase a teacher leader's effectiveness with his or her colleagues.

Communication skills were also considered essential to a teacher leader's success. Proficiency in oral and written skills would include public speaking, presentation techniques, and active listening. Four of six participants thought that being an effective communicator needed to be addressed in teacher leader training.

The more practical, sometimes mundane, aspects of teacher leadership should also become facets of any kind of training for teacher leaders, according to five of the six participants. Fran indicated that chairing a committee required special skills in validating participants' input, synthesizing their comments, and keeping everyone on track. Lucy suggested that developing an agenda for meetings was something she had had to learn on her own. In addition, time management was a concern for Lucy, Ted, and Donna because of the time constraints associated

with the dual responsibilities of being a teacher and a leader, not to mention consideration for their peers' time. Closely related to this topic was long-term planning and creating and/or adhering to timelines, which Reba and Donna suggested might be a topic to include in training.

Other topics might include learning about finance at the school or division level. Some teacher leaders have to work with budgets, grants, and departmental funds. Lucy divulged, "I had some training in my administration classes but it was kind of all made up, make believe, and I don't know how true it is to real life" (CI3-2, pl14). Furthermore, Lucy thought that some formal instruction in problem solving would be helpful to prospective or current teacher leaders. Both she and Fran stated that ability to construct assessments and/or understand the data collected from them were also necessary skills. Finally, Ted's suggestion regarding the politics of leadership was another topic he thought was worth including in teacher leader training. This topic might incorporate the following: advocating for students and teachers, navigating the hierarchy of school and district bureaucracy and knowing who and when to approach, and exercising tact and diplomacy.

All participants indicated that content expertise could not be disguised, and all prospective and practicing teacher leaders were obligated to stay current in their practice and familiar with the research related to their individual content areas. Thus, any kind of teacher leader training would have to address a subject-area component.

Also offered were some ideas about how the training should be structured, who would take part, where it would occur and when. Only two participants mentioned partnering with higher education. Lucy suggested that maybe some of the local colleges might send representatives to some of the sessions to talk about different subjects within teacher leadership. But Ted warned that "Education classes are so full of optimism that I think that's a part of the reason you get the burn-out so early, and I think being a little bit more realistic would help if they took out all the theoretical stuff and you put it with the practical stuff" (DI3-2, p.22). In fact, all the participants' comments about the implementation of teacher leader training implied that they thought this training could be delivered as a district-developed program. Figure 2, Proposed Teacher Leader Training Academy, represents the participants' initial thoughts about such training.

A common thread throughout all the participants' suggestions involved mentoring and modeling for teacher leaders in training. Suggestions included regular contact with practicing

teacher leaders via observations, shadowing, individual conferences, and anecdotal research. A second major component related to building collaboration skills. Several participants proposed that the training involve partnerships with mentor teacher leaders, teamwork, work in small groups, and interactions within schools and among schools – all of which would require intrapersonal as well as interpersonal skills. Operating in a cohort is a powerful mechanism for learning, Lucy offered, and that too requires that people be mutually supportive. The dispositions necessary to effective collaboration must be explored. Even though Donna acknowledged that it would be "difficult to teach people or train them to be giving, to be patient, to be tolerant . . . those are the kinds of qualities that leaders need" (EI3-2, p.28).

On the other hand, intrapersonal skills require that a teacher leader look within; this is the reflection piece and the self-assessment that the participants felt must become part of the training. Again, as Lucy stated, although the intrapersonal skills probably cannot be taught, opportunities should, nevertheless, be incorporated in the training to encourage introspection.

The last big facet of the proposed teacher leader training is largely action-based, experiential, and laden with a variety of opportunities for learning and teaching others. Teacher leaders would be exposed to professional learning situations in and outside the district – presentations, conferences, seminars, workshops, etc. They would likewise be expected to practice some of their skills in those same arenas. Also, they would attend sessions presented by district teacher leaders on some of the practical ramifications of leadership and to learn from their experiences as leaders.

Considering who would participate, Ted and Reba thought that self-selection would suffice and would be a natural choice for teachers who thought of themselves as capable of leadership. Lucy suggested that it should be open to anyone, but perhaps a principal could nominate a teacher too. She added that maybe an interview might be helpful to help prospective teacher leaders decide if what was being offered in the program was aligned to their professional goals and needs. Four of the six participants also thought that teacher leader training of some kind could be offered to preservice teachers because, as Reba stated, some preservice teachers will come into teaching with some leadership skills.

> I don't know that you actually teach those in their preservice training or anything like that, but I think that they already come with plenty of skills and it's a matter of, again,

> sort of helping them hone those skills in leadership roles and things beyond their classroom presentation. (FI3-2, p.32)

Donna said that leadership training could become a part of the preparation for preservice teachers, but questioned how those dispositions or skills that only come with experience could be included effectively. Nonetheless, Holly suggested that if preservice teachers "learn some of the tools of leadership in their college careers – they're young; they may not necessarily apply them, but if they could have a working knowledge of teacher leadership" (BI3-2, p.7), they may not only be prepared for leadership but assume it earlier than expected. Holly proposed that as a starting point a leadership inventory could be administered to preservice teachers to determine if some of them had the aptitude and inclination for leadership. In conclusion, preservice training might not look like what the participants proposed for practicing teachers, but some elements of teacher leadership could be included.

WHO WOULD PARTICIPATE

- self-selection
- principal nominations
- no 1st-year teachers
- interviews of prospective participants
- practicing teacher leaders design and supervise the entire program

WHEN & WHERE WOULD TRAINING OCCUR

- monthly or bi-monthly & summer
- sessions
- periodic follow-ups after core training
- one central location for sessions with additional field experiences

HOW TEACHER LEADERS WOULD TRAIN

- are assigned to practicing teacher leader mentors and shadow them at times
- engage in observations of teacher leaders in action
- practice skills and share with peers in structured situations using a 3-tiered progression: in-building presentations, group projects with people in a number of buildings, and sharing at a conference or in some capacity that allows for wider opportunities for sharing
- progress through the program in cohorts
- work in teams on real-school projects
- engage in periodic opportunities for self-evaluation

WHAT THE TRAINING WOULD INCLUDE

- practicing teacher leaders relating their own experiences as leaders, and modeling strategies, skills, and dispositions for effective leadership
- uses mock scenarios and role-playing
- uses principals and teacher leaders as guest speakers
- embeds opportunities for individual conferences and reflection
- includes independent studies involving topics for research and subsequent group discussion
- a follow-up support system that requires the cohort to come together regularly after the formal training ends
- includes summer reading and research session
- flexible schedules to allow teacher leaders in training to attend conferences and workshops, visit other schools, and observe other teachers

Figure 2. Proposed Teacher Leader Training Academy

CHAPTER V:
DISCUSSION OF FINDINGS, CONCLUSIONS, LIMITATIONS, IMPLICATIONS, AND RECOMMENDATIONS

The purpose of this study was to examine how teacher leaders describe their preparedness for leadership, as well as their continuing growth as leaders. Data were examined as a means to determining what might be included in training aimed specifically at the preparation for future teacher leaders. The rich stories that emerged from the six participants' experiences and reflections were based on interviews, written responses to prompts for additional information or elaboration, observations of them engaged in leadership activities with their peers, and portfolio artifacts which offered further color and detail associated with their leadership values and the lessons they had learned. At the end of the study, what was clear was their similarity in knowledge, skills, and dispositions; their roles; their influences; their initial preparation to be leaders; and their continuing efforts to grow in leadership. Although they represented a spectrum of teacher leaders from elementary through high school and from the four core content areas as well as special education, their stories are remarkably similar.

Discussion of Findings

The subordinate research questions that must be answered before any conclusions can be made about the training for tomorrow's teacher leaders are presented first. The conceptual model (see Figure 1) that evolved from a review of the literature directed the collection and coding of data, and the presentation of findings for this study are likewise organized according to its general themes. Each of the themes is summarized separately according to the findings and is summarized across the cases.

First Subordinate Research Question

The first subordinate research question of the study was posed as follows: What knowledge, skills, and dispositions do practicing teacher leaders say they need, but don't necessarily have, in order to help their colleagues and students be more productive? The phrase, "but don't necessarily have," is answered quite simply: The participants in this study did not reveal that they were lacking any knowledge, skills, and dispositions in order to help their colleagues and students be more productive. Based on their own experiences, these teacher leaders did, however, provide a wealth of data about the knowledge, skills, and dispositions that they considered essential to a teacher leader's success.

Second and Third Subordinate Research Questions

The second subordinate research question asks how the needs of teacher leaders vary among elementary, middle, and high school teacher leaders. The teacher leaders in this study defined the knowledge, skills, and dispositions, as well as the roles and tasks required of a teacher leader, as the same or very similar across all grade levels (see Table 6). The third subordinate research question asks how these needs vary among specific content area and resource teacher leaders (beyond the demands of subject area expertise). Likewise, the teacher leaders in this study defined the knowledge, skills, and dispositions, as well as the roles and tasks required of a teacher leader, as the same or very similar across all content areas (see Table 6). Indeed, the only meaningful differences among the participants were their very unique personalities, not their teaching assignments; their collective understandings of teachers as leaders were extraordinarily similar. The stories of the teacher leaders in this study indicate that their legitimacy as leaders among their peers is dependent on owning these knowledge, skills, and dispositions. And when they are seen as legitimate leaders by their peers (Lieberman, 1987), they are followed.

During the course of the study, these individuals demonstrated that they had a natural predisposition for leadership because of their highly developed interpersonal and intrapersonal skills. Furthermore, these skills were complemented by content expertise and managerial competence that had been developed and honed through experience. What knowledge and skills they may have lacked as neophyte teacher leaders had been developed through on-the-job training. The only limitation they acknowledged was a lack of adequate time to do all the things they wanted to do and to do them to the best of their ability. Their suggestions for preparing teacher leaders of the future (see Table 7 & Figure 2) might be interpreted as deficits they suffered in the beginning of their leadership roles; however, no participant indicated that these were present deficits, only suggestions for teacher leadership training.

The literature review conducted prior to the data collection from the participants validates most of their insights, but some of their contributions are fresh and extend and elaborate the already existing research on teacher leadership. Their descriptions of themselves in particular and teacher leadership in general reveal a great deal about the teacher leader including the innate characteristics of the person, the learned skills of the manager, and the interpersonal and reflective nature of the leader. From this multidimensional portrait, some implications for teacher

leadership training surfaced. Additional to these data, the participants offer their own suggestions for training a new generation of teacher leaders.

Fourth Subordinate Research Question

The last subordinate research question asks how teacher leaders describe their ongoing professional development and attempts to grow in leadership. The teacher leaders in this study shared a commitment to ongoing professional development and efforts to grow in leadership. Three of them described their leadership growth as a constant process, and all of them described themselves as life-long learners. Their ongoing efforts included graduate classes, certificate programs, endorsements to their licenses, and attendance at district professional development seminars. They added to their knowledge and skill base by attending conferences and workshops outside their district and by belonging to professional organizations in their subject areas and instruction in general. However, there was limited exposure to training in leadership other than on-the-job training. Only three participants indicated that they had had any formal instruction in leadership and that instruction was limited.

While discussing their own preparedness to lead, participants were asked to consider what kind of training for teacher leaders they might design. They offered suggestions that addressed who should attend and who should design and supervise the proposed academy, where and when it should operate, what would be the major components of the training, and how the training would be implemented. Their concept of the teacher leadership academy was practical, plausible, and in many respects unlike any appearing in the literature review.

Findings Related to the Conceptual Model

Findings from each case, along with data from profile sheets and nomination forms, are organized according to the domains from the conceptual model (see Figure 1).

Knowledge, Skills, and Dispositions

Tables 1, 2, 3, 4, and 6 display the data collected from the participant profile sheets and principal and supervisor nomination forms, as well as the data collected from interviews, observations, e-journals, and participants' portfolios. When all these data sources are considered, they reveal approximately 50 descriptors attributed to teacher leaders that relate to their knowledge, skills, and dispositions. Nearly all of these descriptors are aligned with a review of the literature conducted prior to this study.

Knowledge. In the knowledge domain, participants in this study described teacher leaders as instructional or content experts who were committed not only to their own subject areas but also to student and teacher success schoolwide. These leaders were involved in the total school program, serving on many committees, and saw their mission as improvement or enhancement of student achievement. Thus, they were concerned about the greater good of the school and/or their departments. This depiction of teacher leadership is reflected in Donaldson's (2001, p.7) three dimensions of teacher leadership: relationships of mutual trust and influence, a merger of individual purpose with organizational mission, and "action-in-common" as the most productive working arrangement because all parties are united in belief and shared experiences. Likewise, Lambert's (1998) proposed framework for teacher leadership refers to teacher leaders in roles and responsibilities that reflect broad involvement and collaboration with a goal of high student achievement not only in their own classrooms but in the entire school.

To remain current in their practice and knowledge base, the teacher leaders in this study described themselves as life-long learners who belonged to several professional organizations and conducted their own informal or formal research. This portrait of the teacher leader as a constant learner is mirrored in the work of Goldman (2001) and Glickman (2002), who describe a teacher leader as an action researcher, and in the profile developed by Krisko (2001) that includes life-long learner as one of its eight traits. Dils (2001) also includes among his findings that teacher leaders tend to participate in group and individual research activities and belong to professional organizations. The teacher leaders in this study believed that part of their success was based on the premise that they were broadly, though not necessarily highly, educated, and their experience spanned several years and several grade levels. The study conducted by Lieberman (1987) agrees with these descriptions by referring to teacher leaders as well-rounded, mature, experienced educators with a broad perspective, often holding advanced degrees, and having taught on several grade levels Although all but one of the teacher leaders in this study did not consider themselves to be specialists, their principals did, and this role is in keeping with the findings of Lord and Miller (2000) who describe a variety of roles assumed by teacher leaders, among which is specialists. Specialists or not, they felt a responsibility for passing on their knowledge to their peers by conducting workshops and professional development seminars and presenting at conferences.

Skills. In the skills domain, participants in this study described teacher leaders as being particularly adept in communication and interpersonal skills. According to these participants, teacher leaders are articulate, diplomatic, and discreet with both public and private audiences. Wettig (2002) concludes that teachers serving as clinical instructors (five of six participants in this study were) should be articulate; and Silva, Gimbert, and Nolan (2000) also conclude that teacher leaders need to be articulate so that they can communicate honestly and frankly with administrators. Even more important, according to the teacher leaders in this study, people skills are paramount whether at use in groups or individually. Building rapport and collaborating are a teacher leader's strengths. Lieberman (1987), Swanson (2000), Snell and Swanson (2000), McCay et al. (2001), Donaldson (2001), and Fullan (2002) extol the benefits of building relationships and rapport among peers and with administrators so that productive collaborations can exist. The teacher leaders in this study knew when to encourage and acknowledge the contributions of others and when to advise them. Combs, Miser, and Whitaker (1999) describe this kind of leader as authentic and person-centered who welcomes contributions to leadership. Teacher leaders as depicted by the participants in this study also know whom to mentor and whom to support. They know how to motivate their peers and how to instigate change. Motivating and mentoring are described in the study conducted by Snell and Swanson (2000), mentoring and operating as a change agent are included in the Suranna and Moss study (2002), and references to teachers as agents of change and motivators appear in the study by McCay, Flora, Hamilton, and Riley (2001).

In addition to these people skills, the participants in this study indicated that teacher leaders possess excellent managerial skills. They are organized and effective at disseminating information and resources. Lieberman (1987) also speaks of teacher leaders' organizational skills and their involvement in community and political organizations. No matter what the event or activity, they are always thoroughly prepared having developed an agenda and later adhering to it. Good planners, they know how to manage their time and set priorities. Being competent managers of time and resources applies to their personal lives, too, for effective teacher leaders must find that balance between home and work and be able to set boundaries for what they can reasonably accomplish well and completely. These are individuals who share their home time with service to their communities, too. Consequently, being practical and realistic about their own limitations is sometimes frustrating for them but necessary.

Dispositions. The dispositions of teacher leaders appear to be the most problematic when designing a training program for teacher leaders. For the most part, these are character traits, innate and learned, that seem to predispose some individuals and not others to leadership. Participants in this study characterized teacher leaders as follows: goal-driven, action-oriented, risk-taking (or courageous), global thinking, trusting and trusted, flexible, positive, persevering and patient, confident, servant leaders, and reflective. There are numerous references in the literature to these same traits (Greenleaf, 1977; Lieberman, 1987; De Pree, 1987, 1992, 1997; Gehrke & Romerdahl, 1997; Snell & Swanson, 2000; Swanson, 2000; Silva, Gimbert, & Nolan, 2000; Dozier, 2001; Krisko, 2001; and Suranna & Moss, 2002). These traits are essential to teacher leaders because they impact their ability to work collaboratively with others and to survive the dual role of teacher and leader. They are, however, the kinds of traits that seem to be natural components of some individuals' personalities or traits that are learned through wide experience with co-workers and community members. Nonetheless, the participants in this study made practical recommendations for "teaching" these traits to less veteran teachers who had the potential to become leaders among their peers.

One disposition that every teacher leader in this study exhibited and endorsed as essential to success was self-reflection. It might be considered a skill, but a skill implies that it can be taught. And half of the participants in this study were adamant that self-reflection is a natural ability that cannot be taught, even though time and opportunities may be provided to encourage reflection. Skill or disposition – all the participants in this study insisted that it is an especially important element in adult learning. Reflection was considered so important by Snell and Swanson (2000) that they include reflection as one of the qualities in their conceptual framework for teacher leader qualities, and Krisko (2001) includes intrapersonal sense as a trait in the profile of teacher leader characteristics he developed. Lastly, Swanson (2000) distinguishes teacher leaders from expert teachers in part by their ability to self-reflect.

Situations and Opportunities for Leadership

The participants in this study spoke proudly about their preparation for leadership: the opportunities they had been given to lead, the support of their building administrators, the school climate and culture conducive to shared governance and decision making, and the mentors who had influenced their leadership. Only three of them had engaged in any training targeted at leadership, so the opportunities to lead that came their way became rehearsals for leadership,

each one offering practice and informal lessons on the knowledge and skills necessary to lead their colleagues.

Situations. The situations and opportunities described by the participants in this study were generally categorized as follows: community activities and personal experiences, activities related to education in the wider community outside their own schools, and opportunities within their schools. The latter included activities initiated by the participants themselves, in addition to those their principals or central office administrators had provided. Community involvement and personal experiences that contributed to their growth as leaders ranged from starting a business to running for political office. One participant described her activities as outlets for her creativity and physical energy, yet she was quick to note that she could apply these activities to collaboration and leadership of her peers. Five of the six participants were involved in activities that would be described as service to their communities. Engaging with the community beyond the school walls is typical of teacher leaders, according to Lieberman (1987). Although Dils (2001) reported that teacher leaders did not tend to run for political office, one of these teacher leaders had done so twice and was actively involved in the county government serving on several committees and in the local Republican Party.

The participants in this study were recognized teacher leaders not only in their own schools but also at the district level. Thus, they were frequently interacting with other teacher leaders from across the district. Four of the teachers were lead teachers in their subject areas and one was a special education resource teacher. One teacher became a part-time instructional coordinator for the district during the course of the study. As such, they had all been called upon to serve on districtwide committees, and five of the six had delivered professional development at the district level. Not only had they had engaged in opportunities occurring within their districts, but they had also participated at state, national, and international forums. Three had served on district textbook adoption committees, one had organized a school district/county event, two had been appointed to Virginia Department of Education committees, and one had served as an adjunct instructor for the local university. One had even participated in an international curriculum institute. In addition to these venues for professional growth, all were affiliated with regional, state, and international organizations that provided arenas for networking with other teacher leaders and opportunities for them to present workshops for their peers. This commitment to participate as professionals in a variety of situations and to share with their peers

is seen in the study by McCay, Flora, Hamilton, & Riley (2001) and in the work of Dils (2001) that found that teacher leaders tend to hold membership in professional organizations and connect with higher education.

Principal. The principal has the power to make teacher leaders. Beyond exemplifying and inspiring leadership, he or she must provide formal structures within the school that invite teachers to develop and practice leadership skills, as well as share in the decision-making for the school. In this study, three participants organized special school events, and three developed special instructional programs. All the participants had created materials to facilitate the work of other teachers, acted as grade-level team leaders and department chairs, and served on a variety of committees. All had been appointed as formal mentors for new teachers, and all had worked as informal mentors. These kinds of leadership situations are the structures Blase and Kirby (1992) recommend that principals must provide to nourish teachers in becoming leaders. But more than just providing structures and opportunities for leadership, the teacher leaders in this study had worked hard to build relationships with their principals that engendered mutual trust, honesty, and support, even if the teacher leaders questioned their own leadership at times. These are just the kind of partnerships described by Gehrke and Romerdahl (1997). Fullan (2002) also endorses the need for relationship building, and Evans (1996) and Terry (2003) describe an authentic leader as one who breeds a culture of trust like that needed in a mutually supportive relationship. Plus, an authentic leader, according to Combs, Miser, and Whitaker, (1999) welcomes and encourages contributions to leadership. Unlike the participants in the Dils (2001) study that concluded that role confusion occurs with shared decision-making when teachers must learn to work with principals in different ways, five of the six participants in this study were very forthright in acknowledging that they knew their place in the school power hierarchy, no matter how close they were to their principals. Although they were not so presumptuous as to see themselves as equal to the principal in position and power, they were able to establish a rapport with their principals where they were treated as equals. Lieberman (1987) describes this type of relationship as an indicator of teacher leadership.

School climate and environment. Entwined with the data collected from participants relative to their principals' support for their leadership were very frank perspectives on the principal's impact on the culture and climate of the school. In this study, these too had influenced teacher leaders' abilities to operate effectively among their peers. They noted that the principal

was largely responsible for setting a positive, collegial ambience in his or her building, a setting where teacher leaders flourish (Snell & Swanson, 2000) and the school's mission can be realized (Azzara, 2000). In fact, participants in this study demonstrated that the work they did in their buildings beyond their own classrooms was necessary to the efficient operation and governance of the school, adding evidence to the conclusions reached by Blase and Kirby (1991), Sergiovanni (1992, 1999, & 2000) and Lambert (1998). These researchers agree that schools are communities where their citizens are interdependent and their missions are established and achieved through shared leadership. Unlike the principal depicted in the Zepeda and Mayers study (2002), none of the participants' principals in this study had assigned them administrivia and wasted their valuable time by foisting off on them the duties they found unimportant or distasteful.

Principals in the schools where these teacher leaders operated had developed a climate that allowed the teacher leaders to do what needed to be done to support student success and school excellence. All of the teacher leaders in this study described projects, programs, and events they had initiated after seeing a need in their buildings. Two of them described a teacher leader as someone who doesn't wait to be asked when there is work to be done, and all the participants had approached their principals when they perceived a need that they personally were willing to address. This stance is prevalent in the literature on roving leadership in the corporate world described by De Pree (1997) and in the educational arena described as situational leadership (Clarke et al., 1998; Glickman, 2002) or situational mastery (Goldberg, 2001). In these situations, principals empower teacher leaders to take possession of a problem and its solution.

Principals must create structures to foster teacher leadership within a culture of mutual respect and a shared vision. This is a point made in the study conducted by Azzara (2000). One of the participants in this study described such a culture. She spoke enthusiastically about faculty morale and how her principal's implementation of several committees to consider various school issues had increased collegiality and caring among the faculty and enhanced school spirit in general. Situations and opportunities that encourage teacher leaders to develop cannot be totally effective if the school climate is not genuine in its support. In other words, no matter how many structures exist to promote shared governance and collaborative problem solving, if no one believes that the principal's motivation is sincere and his efforts cannot be trusted, then the

school climate will poison and distort teacher leadership. None of the participants in this study indicated that they had experienced a negative school environment, but two offered admonitions about promoting teacher leaders who might be competent in subject content but capable of being a negative influence among colleagues.

Mentors. At the very beginning of the study, participants completed a profile sheet. One component of that survey required them to designate from a list provided to them the primary influences on their development as teacher leaders. Choices included traditional mentors such as principal, assistant principal, school colleague, central office administrator, community person, and educator outside the school district. The data collected from their surveys, along with that gleaned from interviews, electronic journals, and portfolio artifacts, provided some interesting insight to their perspectives on the role of mentor. Although their descriptions of their principals were positive, and in some cases they were described as role models and facilitators for their leadership, data did not include the use of the term mentor in the descriptions provided by the participants. Their principals were primary influences on their leadership because they had provided opportunities for leadership and a school climate that encouraged and supported teacher leaders. They did not speak of them as mentors, as is prevalent in the literature on principals, in studies such as those conducted by Hibert (2000) and DeBlois (2000) that refer to principals mentoring leadership. Rather, when they gave examples of mentors, they pointed to those who had inspired them, exemplified habits of scholarship and subject expertise, led the way for them, and were generous in spirit, support, and resources.

In this study, two of the teacher leaders had been profoundly influenced by central office administrators, whom they had watched conducting meetings and modeling managerial skills, professional knowledge, and dispositions. They had provided funding for teacher leaders to take classes and attend conferences. Swanson (2000) agrees that teacher leaders must be nurtured through high–quality professional development. But these mentors also required the participants to give back to their schools and districts by presenting workshops and serving as conduits for information and resources at their individual schools. They collaborated with them on projects and helped them develop an instructional philosophy that gave meaning and purpose to their leadership. Lieberman (1987) adds that a teacher leader must have not only developed a strong ideology and belief system, but he or she must also be able to articulate and defend it if necessary. In short, these central office mentors took a deeper interest in these teachers and their

growth as leaders in addition to providing situations and opportunities for them to lead.

Two other participants spoke with great admiration about school colleagues who had mentored them in less formal arrangements. Witnessing the way these mentors interacted with administrators and peers provided valuable lessons in sharing and relationship building. Their willingness to support their colleagues with integrity and discretion was invaluable in the midst of the sometimes chaotic world of school reform. These mentors also introduced these teacher leaders to the advantages of professional networking and affiliations and modeled a work ethic that illustrated that teaching and leading are not mere jobs; they are vocations. There was a more personal connection in their relationships. This attention to the personal side of the mentoring relationship is also described in the Swanson study (2000). These peer mentoring relationships are similar to the critical friend model described in the studies by Glickman (2002).

All the teacher leaders in this study had operated as both formal and informal mentors themselves, and these situations had helped them grow as leaders. These mutually rewarding relationships among their peers and in the supervision of student teachers are illustrated throughout the literature on teacher leadership, for example, in the studies conducted by Lord and Miller (2000), Snell and Swanson (2002), Suranna and Moss (2002), and Wetig (2002).

Though not identified as mentors, there were other significant influences on these teachers as they developed into leaders. Three participants praised the support they had received from assistant principals and four mentioned educators outside the school district. Five participants mentioned the support and encouragement of school colleagues. There was ample evidence of how much they appreciated their colleagues in the comments made in interviews and in their portfolios. Interestingly, although teacher leaders are active in their communities, none of the participants in this study noted any impact on their development as leaders from any member of the community.

Formal Training

The teacher leaders in this study described themselves as life-long learners and were steadfast in their commitment to stay current in their subject matter and in their practice.

Participants' Own Training

All but one of the six participants had earned or were completing graduate degrees, and three of the six had earned or were completing additional certifications and endorsements beyond those degrees. This commitment to higher learning is also illustrated by the subjects in the

Lemlech and Hertzog study (1998) and the Dils study (2001). Furthermore, like the teacher leaders described in the Dils study (2001), all six participants in this study were affiliated with educational organizations that provided them access to journals, conferences, and networking with subject matter colleagues as well as teachers and administrators in general. Moreover, all six participants indicated that they had served on school and district committees, and these experiences had helped them to grow as leaders.

However, few opportunities existed to train them specifically in leadership skills. Two participants indicated that they had had some instruction in leadership as a result of their participation in the math specialist program and in a course to earn an administration and supervision endorsement. Only one participant had earned a certificate in a teacher leadership program offered through a local university, and he was less than impressed with the content of the five required sessions. There were only three references to any kind of teacher leader preparation in the literature review: the Wetig (2002) study that describes a training program for clinical faculty, a graduate course on leadership described in the Suranna and Moss study (2002), and the Lemlech and Hertzog study (1998) that suggests a need for preservice teacher leader training. Otherwise, there was little mention of any existing program to prepare teacher leaders at the college or public school level. It is not surprising, then, that the participants in this study had enjoyed little formal training in leadership since few opportunities seem to exist.

Nonetheless, the teachers leaders in this study had a lot to contribute relative to what they thought should be in a training program for new and not-yet-identified teacher leaders. When collected across the cases, these teacher leaders envisioned a framework for a teacher leader academy that would be run by teacher leaders for teacher leaders.

Proposed Training for Teacher Leaders

By the time all the data were collected, each of the six participants in this study had contributed something to the proposed teacher leader training that encompassed the who, when, where, what, and how of an academy. Its framework is a fresh perspective developed by practicing teacher leaders, not central office staff or university professors.

Who. First, participants suggested that teacher leaders should be responsible for designing and implementing the academy. Second, participants would enlist in the academy of their own volition, because self-selection to participate in this kind of opportunity for learning is, after all, a trait of a prospective teacher leader. Principals might suggest participants, but the onus for

following through on their own would belong to the nominees. Participation would be open to second-year teachers, although Ted suggested that even second- and third-year teachers might be too overwhelmed and inexperienced to benefit fully from the academy. If there were a question about the participant's career goals, understanding of the nature of the academy, or commitment, an interview might be appropriate prior to entrance to the academy. Holly suggested that developing an inventory of teacher leader traits, roles, and characteristics might be an effective way for teachers to reflect on their suitability or interest in becoming teacher leaders. The concept of a teacher leader profile has been addressed by both and Krisko (2001) and Glanz (2002) to identify teacher and administrator leadership styles and traits. Wetig's study (2002) also suggested a leadership assessment inventory be used to determine leadership styles and how those styles might impact interactions with colleagues and a leader's growth. In the proposed teacher leader academy, the profile could be used by prospective teacher leaders to show them their potential for leadership and to identify weaknesses that could be addressed by future training.

When. The academy would run a series of monthly or bimonthly sessions along with a summer session. During the school year, some of the sessions might occur on Saturdays, as many teachers are already committed to many events and activities on week nights, and summer sessions would allow participants time to read and reflect on professional literature and research. According to Snell and Swanson (2000), teacher leader training of adequate time and substance is critical to the development of the knowledge, skills, and dispositions essential to teacher leaders.

Where. There would be one central location within the district for formal sessions, although field experiences might include attendance at out-of-district conferences, workshops presented in individual schools, and observations of working teacher leaders in other schools. Attendance at conferences and forums for sharing information were also components of the university partnership for training teacher leaders described in the Wetig (2002) study.

What. Topics that this study's participants thought important to include ran the gamut from practical to political to personal. Practical or managerial skills included such topics as chairing a committee, presentation techniques, time management, long-term planning and adhering to timelines, and awareness of school finance and budgets. Another topic, the politics of leadership, according to the participants in this study, refers mainly to navigating the

bureaucracy without "stepping on toes" or "sticking your foot in your mouth." Related topics might include the following: knowing where the teacher leader fits in the bureaucracy, role confusion in the context of shared decision-making and shared governance (Dils, 2001), using gentle persuasion with colleagues when necessary (Gehrke and Romerdahl, 1997), taking risks when taking the lead (De Pree, 1997), and walking between the worlds of teachers and administrators (Lieberman, 1987). Operating within the bureaucracy, persuading others to follow, and taking risks are situations that participants in this study indicated will obligate teacher leaders to operate politically.

Interpersonal skills cover a wide range of subtopics, such as building trust, learning patience, and motivating others; and they are closely connected to developing awareness of personality types and learning styles in adults, a topic considered essential to include in teacher leader training by participants in this study. De Pree (1997) insists that understanding the talents and strengths of colleagues is a responsibility of good leaders so that everyone can contribute and share ownership of a project. This view is similar to that of Sergiovanni (1992), who describes a school as a community of individuals who have a variety of strengths, talents, needs, and a responsibility to each other. Indeed, working with adult learners and understanding the psychology of change were prominent suggestions from four of the six participants for inclusion in a training program for teacher leaders. Fullan (2002) considers understanding change to be one of five conceptions necessary to a school culture that breeds trust, and if teacher leaders are to adopt the role of change agent (McCay et al., 2001; Surrana and Moss, 2002), then exploring the psychology of change is incumbent upon them.

Collaborative relationships depend on working positively and productively with colleagues, and Lucy suggested that a study of collaboration models would be helpful. Collaboration is an essential skill for teacher leaders and it is mentioned repeatedly in the literature. Lambert (1998), Lemlech and Hertzog (1998), Snell and Swanson (2000), McCay et al. (2001), Glickman (2002), and Wetig (2002) are among many who have concluded that teacher leaders must be effective collaborators. Furthermore, information about collaboration should be complemented by strategies for problem solving, suggested Lucy. Problem solving appears in the literature on roving leadership by De Pree (1997), who endorses empowering others to identify a problem, take ownership of it, and solve it. And problem-based learning is one of the structures suggested to principals who wish to develop teacher leaders in their schools

(Goldberg, 2001). The proposed teacher leader academy would also address the need to develop excellent written and oral communication skills, as well as active listening skills. Silva, Gimbert, and Nolan (2000) agree with the need to train teacher leaders to be articulate because they will be called upon to communicate with administrators, in addition to their peers, in a culture of collegiality and shared school mission. And knowledge of assessment and interpretation of data were two additional topics that teacher leaders in this study thought should be included in their training. In the research conducted by Dils (2001), teacher leaders are typically involved in the development and assessment of standards, so this topic is a prudent addition to teacher leader training. Finally, all participants agreed that the teachers enrolled in the academy must be trained to mentor other teachers. Mentoring is a consistent theme throughout the literature on teacher leader preparation and is seen in the work of Snell and Swanson (2000), Dils (2001), Wetig (2002), and Suranna and Moss (2002).

Even though every participant was adamant about a teacher leader's need to engage in deep content preparation, that kind of expertise could not be developed in this proposed teacher leader academy; however, participants indicated that some attention to subject area competence could be included via some special subject area sessions and conferences. Content expertise is a primary element of teacher leader preparation, and the studies of Lieberman (1987), Snell and Swanson (2000), and Swanson (2000) include it among their descriptions of teacher leaders.

Three of this study's participants felt strongly that some of the dispositions essential to becoming an effective teacher leader could not be taught. They did concede, however, that practicing teacher leaders could relate their own experiences as leaders and model those essential dispositions through anecdotal teaching. These practicing teacher leaders would also model strategies of leadership while being observed by the academy participants in a variety of situations. Gehrke and Romerdahl (1997) include learning and modeling new skills as one of the four primary roles of teacher leaders. Participants in this study also suggested the use of mock scenarios and role-playing situations that would illustrate various leadership skills. This kind of instruction could offer short cuts to experience, since many of the academy participants would be relatively inexperienced. Some principals and other guest speakers would be invited to lecture or offer their insights on leadership. Reflection is also a skill that three of the six participants did not believe could be taught. They and the other participants did insist, though, that opportunities for self-reflection must be embedded in the sessions. The emphasis on reflection as a component

of teacher leader training is in keeping with the findings of Snell and Swanson (2000) and Swanson (2000). Additionally, Reba thought that there should be regularly scheduled conferences involving reflection with assigned mentors. Yet another suggestion from Lucy would require teacher leaders-in-training to conduct independent studies involving current topics for research; research findings would be followed by group discussions. Dils (2001) concludes that teacher leaders have a significantly higher participation in group and individual research, so these independent studies would be appropriate to prepare them for future research study. In fact, every participant in this study indicated that reading and research were important parts of their development and maintenance as leaders. Summer sessions would accommodate a busy teacher's schedule that often prohibits reading and research during the school year. Lastly, a follow-up support system was suggested by two participants that would require the academy participants to come together periodically after the formal training ends.

How. Clearly, if a teacher leader academy is to be supervised by teachers for teachers, principals will need to allow teachers to operate on flexible schedules, as pointed out by three participants in this study. Lucy suggested that the implementation of a cohort model would be powerful for the academy teachers. Within the cohort, each academy teacher would also be assigned to a mentor in his or her school whom he or she would shadow at times; at other times the academy teacher would observe master teachers and teacher leaders in action. Opportunities to engage in teamwork to address real-school projects and problems would assist academy teachers in practicing collaborative skills. Mentoring and collaboration are prominent topics for professional development included in the studies by Lemlech and Hertzog (1998) Snell and Swanson (2000), Swanson (2000), Dils (2001), Suranna and Moss (2002), and Wetig (2002).

Reba proposed a three-tiered progression that would require individual teachers in the academy to practice skills and share with their peers in structured situations first at the building level, then in small groups among several schools, and finally as a presenter at a conference or in some broader capacity. Throughout this progression or whatever framework is used, opportunities for academy teachers to engage in periodic self-evaluation would be included.

The teacher leaders in this study were so enthusiastic about the concept of professional development for teacher leadership that they agreed that some kind of introduction to teacher leadership could be targeted at preservice teachers. Validating this suggestion, Lemlech and Hertzog (1998) concluded that teacher leader programs could exist for preservice teachers.

A review of the literature revealed limited attempts at providing any kind of specialized training aimed at developing the leadership capabilities of teachers. For example, the Wetig study (2002) was reserved for clinical faculty training aimed only at teachers supervising student teachers, and it was designed by the partner college. The Lemlech and Hertzog study (1998) focused only on leadership training for preservice leaders. While mention was made of suggested professional development for teacher leaders, none was as comprehensive as that proposed by the participants in this study.

Conclusions, Implications, and Recommendations

The following conclusions are drawn from six data sources: the profile sheets completed by each participant and the nomination forms completed by the principal or supervisor who nominated the participants; two interviews with each participant; three electronic journal responses; one observation of each participant engaged in a leadership activity; and a portfolio containing at least five artifacts with explanations of the significance of each artifact to the development of that teacher leader. Listed in no particular order, each conclusion is accompanied by implications for instructional practice and recommendations. These conclusions, implications, and recommendations are specific to the context of this study and there is no attempt to generalize to other contexts.

1. Current teacher leaders rely heavily on their day-to-day experience as the foundation for their development in leadership skills.

Implications and recommendations: Experience is an excellent teacher, but the demographics of the teaching force are changing. Since veteran teachers are leaving the ranks in large numbers, tomorrow's teacher leaders will have far less experience to "teach" them, and they will have fewer experienced mentors to guide them. One recommendation is to develop a formal teacher leader academy similar to the one suggested by the participants in this study.

2. Opportunities and formal situations to practice and observe leadership in action are powerful components in preparation for teacher leadership.

Implications and recommendations: Teacher leaders in this study repeatedly indicated that experience was their best teacher, but they were veteran teachers with an average of 16.5 years on the job. Administrators at the school and district level were identified most often as the providers of situations and opportunities for leadership development. In the

future, increased involvement in structured opportunities and situations may have to substitute in part for the limited experience of teachers preparing for leadership. Therefore, principals should be encouraged to embrace a philosophy of shared governance and decision-making that will promote more contributions and situational leadership from teachers. Past research, however, reports that formal structures are more effective than informal situations, and simply waiting for volunteers to come forward will not increase the number of teacher leaders or quality participation. Principals (and other administrators) must incorporate these formal structures as an integral part of establishing and implementing the school's mission. Furthermore, if teacher leaders are to be optimally useful and effective, principals must be willing to utilize flexible scheduling and provide adequate time for them to do their work to the standards of excellence teacher leaders naturally impose on themselves.

3. There is little available formal training designed solely for the development of leadership skills in teachers.

Implications and recommendations: Teacher leaders in this study were able to function effectively in their dual roles as teacher and leader largely because of their natural talents that seemed to predispose them to leadership. They had also distinguished themselves as content experts and honed their people skills on experience. Although the participants in this study did not admit to any deficits in their teacher leadership, they offered a comprehensive definition of teacher leadership and a daunting description of the knowledge, skills, and dispositions necessary to be successful among their peers and with administrators. Again, the school division should provide formal training for teacher leaders that will guarantee more consistency in expectations for leadership and quality in future teacher leaders.

4. Principals are described more frequently as facilitators to leadership rather than mentors.

Implications and recommendations: Teacher leaders regarded their principals primarily as facilitators to leadership because they provided formal structures for them to share in the work of leadership, decision-making, and school governance. Although they respected, appreciated, and in some cases were quite fond of their principals, teacher leaders did not describe their influence on them as leaders in the same ways as those they

formally identified as mentors. Their mentors developed more personally supportive relationships that inspired them as long-term teacher leaders, rather than only situational leaders. Both kinds of support are necessary to teacher leaders, especially that provided by mentors. Consequently, principals should be judicious in their selection of mentors, and mentors should be made aware that a personal connection with their mentees is as important as their professional advice. Also, the current training for mentors is not appropriate for mentors of prospective teacher leaders. If the latter is to become part of the training for teacher leaders, training for an additional model of mentoring will have to be developed.

5. Teacher leaders have some innate characteristics that predispose them to leadership.

Implications and recommendations: Participants described characteristics and traits of teacher leaders that, in some cases, they thought could not be taught to teacher leaders in training. These individuals might be expert content area teachers and skilled managers, but they might not have the dispositions to be leaders. Principals might wish to survey their staffs using a profile similar to those mentioned in this study to determine who might benefit from teacher leader training or who might be groomed for leadership. These profiles might also be employed in preservice teacher leader training to identify prospective teacher leaders and with currently practicing teacher leaders as part of a self-assessment of their strengths and areas in need of improvement.

6. The relationships shared by teacher leaders and administrators are critical to school improvement and excellence.

Implications and recommendations: As teacher leaders become more prevalent and necessary to the operation of effective schools, they are required to interact with administrators somewhat differently than the teacher/administrator relationships typical in the past. For these reasons, teacher leadership should become an integral part of teacher and administrator preparation. Awareness of the kinds of services and help teacher leaders can provide, as well as the rapport necessary in these partnerships, is critical as the concept and practice of teacher leadership expands.

7. Teacher leadership training is ongoing. No one-time class or training program is adequate to prepare teachers for leadership or to maintain their leadership skills.

Implications and recommendations: By their very nature, teacher leaders are reflective, action-oriented, goal-driven, and continually learning. To keep these leaders effective and current in their practice, they need to be allowed to attend conferences, take classes, conduct action research, and participate in collegial interactions within and outside the school. Therefore, they need to be supported in their professional development with adequate funding and time. These teacher leaders thrive on self- improvement and passion for their work. Donna expressed this spirit in commenting, "Well, I'm hanging in there . . . with all the things we have to face . . . , but I'm hoping to be able to get a little bit more up on the rope instead of hanging at the very tip! I'm hoping to learn a few more things so that I'm boosting myself up a little bit" (EI3-2, p.29). Denying or limiting teacher leaders the opportunities to increase their knowledge and skills sends a negative message about their value to the organization. Perceptions of devaluation lead to disengagement, which impacts faculty who depend on the shared expertise of teacher leaders. The worst case scenario is stagnation of continuous school renewal and a spiritless school culture. Therefore, the district and schools should make funding, professional leave, and allotment of time budget priorities to facilitate teacher leadership to ensure continuing school renewal and improvement.

8. Beyond expert knowledge of their subject matter, teacher leader training does not need to be customized according to content area or grade levels.

Implications and recommendations: Teacher leaders share similar roles, skills, and dispositions, and they develop as leaders in much the same ways, no matter what their subject area expertise or school level assignment. A review of the literature validates this conclusion. Thus, prospective and practicing teacher leaders may learn together the knowledge, skills, and dispositions that are common to successful leadership. Bringing leaders together from a variety of instructional backgrounds is recommended in teacher leader training as it may enrich their knowledge and skill base and help them adopt a broader perspective.

9. Training for teacher leaders can be district designed and district delivered.

Implications and recommendations: Training for teacher leaders does not have to be dependent on partnerships with colleges and universities. That is not to imply that these institutions have nothing to offer, but according to the suggestions for teacher leadership

training that came out of this study, they do not need to take a primary role in the development and implementation of these training programs. Their expertise would be welcomed as consultants or guest lecturers. But considering the depth and breadth of their competence as leaders, as well as their realistic proposals for educating leaders-to-be, teacher leaders, with support from their school districts, are quite capable of providing this training. They would also be the most authentic instructors.

If teacher leaders want to be deeply involved as supervisors and instructors in this kind of professional development, a proposal for a pilot program should be developed with the approval and assistance of the central office. The proposal should be the work of a steering committee of teacher leaders operating with a commitment from the school board.

10. Building fellowship is essential if teacher leaders wish for their colleagues to follow their lead.

Implications and recommendations: Unless teacher leaders can build respectful, empathetic, trusting, and supportive relationships with their colleagues, they will have difficulty motivating them to change their practice. The ability to develop these relationships depends on dispositions, natural and learned, highly developed interpersonal skills, and an understanding of collaborative leadership. More emphasis on relationship building should be included in the professional development of teachers, teacher leaders, and administrators. Increased opportunities for authentic collaborative projects and shared decision-making should be encouraged and supported by principals and other administrators. Authentic, though, means that the collaborations are not just team get-togethers with no expected outcome or rubberstamps of a predetermined conclusion. Nothing will make a sham of collaboration faster and forever. Holly warned of these failures when she said, "It is all very well to say, 'Let's have increased collaboration and teacher leadership,' but if we don't provide the structural support and the communication of how this should look, it is unlikely to occur effectively" (BJ2-3, p.4). True collaborations must be supported with time and patience, as they often take additional time to produce results – but those results are usually better because they have considered more perspectives and included the knowledge of many contributors.

Recommendations for Future Study

1. During an interview with Holly as part of the data collection for this study, she posed the following questions: How much teacher leadership do we really want? And how far are we willing to go to promote it?" (BI3-2, p.9) The first of those two questions might be addressed with administrators, mentors, and teacher leaders themselves. It would be revealing to see how their perceptions of the roles and responsibilities of teacher leaders differ and the amount and type of school governance and decision-making administrators are willing to share. Answers to the second question would indicate how the contributions of the teacher leaders are perceived and if teacher leaders should be compensated, what the compensation should be, and how the work of teacher leaders might be facilitated.

2. As trite as it sounds, another possibility for research might be an investigation of the "nurture versus nature" debate as it relates to the development and training of teacher leaders. In this study there were many references to the personal qualities of teacher leaders – their ability to empathize, engage in introspection, engender trust and place their trust in others, inspire colleagues and galvanize them to action – all of these and more are considered by half of the participants in this study to be qualities inherent in the psychological make-up of teacher leaders. Several participants indicated that there were simply some qualities that could not be taught. What does this mean in terms of teacher leadership training? Can schools really train someone to be a successful leader? Is nurture enough if the nature just isn't there?

3. There should be more exploration into how schools and districts accommodate the dual role of teacher leaders. Are they being compensated with money or time or some other resource? Have they been granted some status or rank, for example, in a career ladder or on a special pay scale? Although the participants in this study never mentioned the need to be formally recognized or compensated for their extra work, they all felt frustrated by the constraints of time. What structures are being implemented to avoid teacher leader burn-out, because as Holly exclaimed in one interview, "One of my problems is that I can be consumed by education . . . because I wake up at three o'clock in the morning thinking about it!" (BI3-2, p.8) It is true that teacher leaders invest in human capital that pays dividends to their spirit and even their own professional growth. Donna illustrated this point when she said, "Teacher leaders get so much back in return because they don't only get to see their students' growth, but they get to see their colleagues' growth, and they get to see their own personal growth" (EI3-1, p.29). But in their

dual roles, how long can teacher leaders operate optimally? Again, Holly's e-journal comments should prod our thinking:

> I don't actually believe that the vision of an organizational structure that could support collaboration and teacher leadership is yet clear. . . .When businesses want to change their organizational structure, they provide training and time to practice the new operational model. In addition, they can shift people easily in and out of the operation. Schools have a challenge in both regards. Teacher time is tight already and moving people around is very difficult. This is not to say that it is impossible, because I think it is, but it would take some significant efforts. (BJ2-3, p.4)

Finally, what incentives could be employed to keep teacher leaders in the classroom? Reba raised this issue in her e-journal: "The main challenge is how to keep teachers in the classroom with students and still provide leadership pathways for them" (FJ2-3, p.10). They are all too frequently promoted right out of the classroom to other positions. In fact, at the conclusion of this study, four of the six teacher leaders were no longer classroom teachers.

4. More research into preservice teacher leader training should also be pursued. As more veteran teachers retire, the corps of teachers will be repopulated with less experienced teachers who will be drafted for leadership roles earlier than their predecessors. It may be necessary to include in teacher preparation training at least an introduction to the knowledge, skills, and dispositions of leadership as a preview of what other jobs besides teaching they may be doing. This might also be the place for administering an inventory to survey for leadership potential. If it is true, as some of the participants in this study indicated, that there are natural leaders, administrators should cultivate them early. Promotion of teacher leadership may also have ramifications for teacher retention; some teachers may be willing to stay in the profession with a vision of pursuing endeavors that stretch their talents and skills.

5. Ten years from now, replicating this study would offer an interesting comparison and additional perspectives on teacher leadership. This study began with a declaration that there was no precise or succinct definition of teacher leadership, and it ends in much the same way. Perhaps Holly's e-journal comments explain why a definition continues to elude us:

> When we say we want increased teacher leadership, what are we asking? We are really asking for the job to be redefined. We are asking all teachers to become collaborators and some of them to be adult leaders in this collaborative setting, as well as leaders in

> their classroom. Both of these proposals mean that we need to restructure how we operate. (BJ2-3, p.4)

In a future study, how will teacher leaders be defined and who will they be? How will teacher leadership have evolved? Will there be new structures in which to operate? And will the training for teacher leaders look anything like the proposal in this study?

REFERENCES

Anderson, J. (1994). Who's in charge? Teachers' views on control over school policy and classroom practices. Office of Educational Research and Improvement (OERI) of the US Department of Education. Retrieved July 23, 2002, from http://www.ed.gov/pubs/OR/ResearchRpts/whos.html

Azzara, J. R. (2000). Great expectations. *Virginia Journal of Education, 93,* 6-10.

Barth, R. S. (2001). Teacher leader. *Phi Delta Kappan*, *82*, 443-449.

Blase J. & Blase J. (1994). *Empowering teachers: What successful principals do.* Thousand Oaks, CA: Corwin Press.

Blase, J. & Kirby, P. C. (1992). *Bringing out the best in teachers: What effective principals do.* Newbury Park, CA: Corwin Press.

Clarke, J. H., Sanborn, S. D., Aiken, J. A., Cornell, N. A., Goodman, J. B., & Hess, K. K. (1998). *Real questions, real answers: Focusing teacher leadership on school improvement*. Alexandria, VA: Association for Supervision and Curriculum Development.

Cohen, R. M. (2002). Schools our teachers deserve: A proposal for teacher-centered reform. *Phi Delta Kappan*, *83*, 532-537.

Combs, A. W., Miser, A. B., & Whitaker, K. S. (1999). *On becoming a school leader: A person-centered challenge*. Alexandria, VA: Association for Supervision and Curriculum Development.

Copland, J. A. (2001). The myth of the superprincipal. *Phi Delta Kappan*, *82*, 528-533.

Council of Chief State School Officers (1996). *Interstate school leaders licensure consortium: Standards for school leaders*. Retrieved July 4, 2003, from http://www.educ.ksu.edu/EDADL928/ISLL standards.pdf

Cromwell, S. (2000). Site-based management: Boon or boondoggle? *Education World*. Retrieved July 23, 2002, from http://www.educationworld.com/a_admin/admin176.shtml

Daniels, H., Bizar, M, & Zemelman, S. (2001). *Rethinking high school: Best practice in teaching, learning, and leadership.* Portsmouth, NH: Heinemann.

DeBlois, R. (2000). The everyday work of leadership. *Phi Delta Kappan, 82*. 25-27.

De Pree, M. (1987). *Leadership is an art*. East Lansing, MI: Michigan State University Press.

De Pree, M. (1992). *Leadership jazz*. New York, NY: Bantam Doubleday Dell.

De Pree, M. (1997). *Leading without power*. San Francisco, CA: Jossey-Bass.

Dils, A. K. (2001). *Preparation and behavior of self-professed teacher-leaders* (Report No. SP-040-195). Wilkes-Barre, PA: King's College. (ERIC Document Reproduction Service No. ED456112)

Donaldson, G. A. (2001). *Cultivating leadership in schools*. New York: Teachers College Press.

Dozier, T. (2001). Stepping out: Why our children need teachers to assume leadership roles. *Virginia Journal of Education*, *95*, 7-10.

Evans, R. (1996). *The human side of school change*. San Francisco: Jossey-Bass.

Fullan, M. (1998). Leadership for the 21st century: Breaking the bonds of dependency. *Educational Leadership*, *55*, 6-10.

Gehrke, N. J. & Romerdahl, N. S. (1997). *Teacher leaders: Making a difference in schools*. West Lafayette, IN: Kappa Delta Pi.

Glanz, J. (2002). *Finding your leadership style: A guide for educators*. Alexandria, VA: Association for Supervision and Curriculum Development.

Glickman, C. D. (2002). *Leadership for learning: How to help teachers succeed*. Alexandria, VA: Association for Supervision and Curriculum Development.

Goldberg, M. F. (2000). An interview with John Goodlad: Leadership for change. *Phi Delta Kappan*, *82*, 82-85.

Goldberg, M. F. (2001). Leadership in education: Five commonalities. *Phi Delta Kappan*, *82*, 757-761.

Goldberg, M. F. (2001). *Lessons from exceptional school leaders*. Alexandria, VA: Association for Supervision and Curriculum Development.

Greenleaf, R. K. (1977). *Servant leadership.* Mahwah, NJ: Paulist Press.

Grossman, P. (2003). Teaching: From *A Nation at Risk* to a profession at risk? *Harvard Education Letter Research Online*. Retrieved on February 14, 2003, from http://www.edletter.org/current/inde3x.shtml

Hargreaves, A. & Fink, D. (2003). Sustaining leadership. *Phi Delta Kappan, 84,* 9, 693-700.

Hibert, K. M. (2000). Mentoring leadership. *Phi Delta Kappan, 82*, 16-18.

Hoerr, T. R. (1996). Collegiality: A new way to define instructional leadership. *Phi Delta Kappan, 77,* 380-381.

Krisko, M. E. (2001). *Teacher leadership: A profile to identify the potential* (Report No. SP-040-365). Orlando, FL: Kappa Delta Pi 43rd Biennial Convocation. (ERIC Document Reproduction Service No. ED459147)

Johnson, S. M. (1996). *Leading to change: The challenge of the new superintendency*. San Francisco, CA: Jossey-Bass.

Lambert, L. (1998). *Building leadership capacity in schools*. Alexandria, VA: Association for Supervision and Curriculum Development.

Lambert, L. (1995). *The constructivist leader*. New York, NY: Teachers College Press.

Lieberman, A. (1987). Teacher leadership. *Teachers College Record*, 88, Retrieved January 18, 2003, from http://www.tcrecord.org/Content.asp?contentID=10504

Lemlech, J. K. & Hertzog, J. (1998). *Preparing teachers for leadership roles* (Report No. SP-037-950). San Diego, CA: Annual Meeting of the American Educational Research Association. (ERIC Document and Reproduction Service No. ED419786)

Lincoln, Y. & Guba, E. (1985). *Naturalistic inquiry*. Newbury Park, CA: Sage.

Lord, B. & Miller, B. (2000). *Teacher leadership: An appealing and inescapable force in School reform?* Education Development Center, Inc. Retrieved July 23, 2002, from http://www.ed.gov/pubs/OR/ResearchRpts/whos.html

Lucas, N. J. (1999). *Lives of integrity: Factors that influence moral transforming leaders*. Unpublished manuscript, University of Maryland at College Park.

Maykut, P. & Morehouse, R. (1994). *Beginning qualitative research: A philosophic and practical guide* .Washington, D. C.: The Palmer Press.

McCay, L. Flora J., Hamilton, A. & Riley, J. F. (2001). Reforming schools through teacher leadership: A program for classroom teachers as agents of change. *Educational Horizons*, 135-142. Retrieved March 22, 2003, from http://www.pilambda.org/horizons/v79-3/mccay.pdf

Mehra, B., Bias in qualitative research: Voices from an online classroom. *The qualitative* http://www.nova.edu/sss/QR/QR7-01/mehra.html

Merriam, S. (2001). *Qualitative research and case study applications in education*. San Francisco, CA: Jossey-Bass.

Miles, M. & Huberman, A. (1984). Drawing valid meaning from qualitative data: Towards a shared craft. *Educational Researcher, 13 (5),* 20-32.

Miles, M. B. & Huberman, A. M. (1994). *Qualitative data analysis*: *An expanded sourcebook.* Thousands Oaks, CA: Sage Publications.

National Commission on Teaching and America's Future. (1996). What matters most: Teaching for America's future. New York, NY. Retrieved on June 1, 2003, from http://www.nctaf.org/publications/whatmattersmost.html

Neuman, M. & Simmons, W. (2000). Leadership for student learning. *Phi Delta Kappan, 82*, 9-12. http://nces.ed.gov/pubs2002/quarterly/fall/q3-3.asp

Patton, M. Q. (1990). *Qualitative evaluation and research methods*. Newbury Park, CA: Sage.

Pielstick, D. D. (1998, Winter). The transforming leader: A meta-ethnographic analysis. *Community College Review*, 26, 15-34.

Scherer, J. (2001). Improving the quality of the teaching force: A conversation with David C. Berliner. *Educational Leadership, 8*, 6-10.

School-based management. (2002). *Education Week*. Retrieved July 13, 2002, from http://www.edweek.org/context/topics/issuespage.dfm?id=18

Sergiovanni, T. J. (2000). *The lifeworld of leadership: Creating culture, community, and personal meaning in our schools.* San Francisco, CA: Jossey-Bass.

Sergiovanni, T. J. (1992). *Moral leadership: Getting to the heart of school improvement*. San Francisco, CA: Jossey-Bass.

Sergiovanni, T. J. (1999, September). Refocusing leadership to build community. *The High School Magazine, 7*, 10-15.

Shen, J. (1997). Teacher retention and attrition in public schools. *The Journal of Education Research, 91,* 2, 81-88.

Silva, D. Y., Gimbert, B., & Nolan, J. (2000). Sliding the doors: Locking and unlocking possibilities for teacher leadership. *Teachers College Record*, *102*, 779-804. Retrieved January 18, 2003, from http://www.tcrecord.org

Snell, J. & Swanson, J. (2000). *The essential knowledge and skills of teacher leaders: A search for a conceptual framework* (Report No. SP-039-409). New Orleans, LA: Annual Meeting of the American Educational Research Association. (ERIC Document and Reproduction Service No. ED444958)

Strauss, A. & Corbin, J. (1998). *Basics of qualitative research: Techniques and procedures for developing grounded theory*. Thousand Oaks, CA: Sage Publications.

Swanson, J. (2000). *What differentiates an excellent teacher from a teacher leader?* (Report No. SP-039-396). New Orleans, LA: Annual Meeting of the American Educational Research Association. (ERIC Document and Reproduction Service No. ED444945)

Suranna, K. J. & Moss, D. M. (2002). *Exploring teacher leadership in the context of teacher preparation* (Report No. SP-040-903). New Orleans, LA: Annual Meeting of the American Educational Research Association. (ERIC Document and Reproduction Service No. ED465751)

Task Force on Teacher Leadership. (2001, April*). Leadership for student learning: Redefining the teacher as leader.* Washington, DC: Institute for Educational Leadership. Retrieved on March 23, 2003, from http://www.iel.org/programs/21st/reports/teachlearn/pdf

Terry, P. M. (2003). Empowering teachers as leaders. *National Forum Journals* Retrieved on March 23, 2003, from http://www.nationalforum.com/Terryte8e3.html

Trochim, W. M., (2001). *The research methods knowledge base.* Cincinnati, OH: Atomic Dog Publishing.

U. S. Department of Education, Office of Policy Planning and Innovation. (2003, June) *Meeting the highly qualified teachers challenge: The secretary's second annual report on teacher quality.*Washington, DC Retrieved on July 30, 2003, from http://www.ed.gov/offices/OPE/News/teacherprep/index.html

Wetig, S. L. (2002). *"Step up" or "step out?" Perspectives on teacher leadership* (Report No. SP-040-894). New Orleans, LA: Annual Meeting of the American Educational Research Association. (ERIC Document and Reproduction Service No. ED465742)

Zepeda, S. J. & Mayers, R. S. (2002). A case study of leadership in the middle grades: The work of the instructional lead teacher. *Research in Middle Level Education Online*, *25*. Retrieved on March 23, 2003, from http://www.nmsa.org/research/rmle_jan_2002_a.html

Appendix A
Nomination Letter and Teacher Leader Nomination Form

May 10, 2004

Principals
Stafford County Public Schools

Dear Colleague:

I am preparing to embark on a study of teacher leadership as part of my doctoral work in Educational Leadership and Policy Studies from Virginia Polytechnic Institute and State University. The School Board and administration have granted permission for me to conduct my study using teacher leaders from elementary, middle, and high schools in Stafford County Public Schools. My intent is to discover what knowledge, skills, and dispositions practicing teacher leaders say they need in order to help their colleagues and students be more productive. However, I need your help in identifying these teacher leaders. I am requesting your assistance in selecting one individual from your school who you believe is an exemplary teacher leader. As you make your choice, please consider the attached list of characteristics frequently associated with teacher leaders. Check the traits that apply to the teacher leader whom you are nominating and send the nomination form to me by June 1. From this population, I will select a sample who represent a range of experience, teaching assignments, gender, and instructional levels and request their participation in my study. To increase validity, I also ask that you keep your nominations confidential so that when these teachers participate in the study they are not aware that they have been identified as teacher leaders themselves. I thank you for your help and promise to apprise you of my findings once the study is complete and the dissertation is finished.

Sincerely,

Becky Danello
Doctoral Candidate at Virginia Tech
645 Wright Drive
Ruther Glen, Virginia 22546

Teacher Leader Nomination Form

Directions: Below is a list of characteristics commonly associated with teacher leaders and a list of typical roles assumed by teacher leaders. Please place a check next to each trait that describes the teacher leader whom you are nominating. Then identify situations in which this individual exhibits leadership skill.

NOMINEE: _____
MALE _____FEMALE _____
CURRENT TEACHING ASSIGNMENT (grade level/subject area):_____
YEARS OF EXPERIENCE AT YOUR SCHOOL:_____

✓	**CHARACTERISTICS OF TEACHER LEADERS (PLEASE CHECK ALL THAT APPLY.)** **THIS TEACHER --**
	Is a life-long learner or holds advanced degrees
	Has taught on several grade levels
	Is considered a content expert
	Possesses a global view of education and his or her impact beyond the immediate classroom
	Is organized
	Is positive
	Is flexible
	Is active in community or political organizations
	Is seen as a leader by his or her peers
	Models courage
	Models perseverance and patience
	Understands that serving others is a keystone of leadership
	Sees himself or herself as an agent of change
	Models collaboration and sharing
	Motivates others
	TOTAL # OF ✓'S

✓	**SITUATIONS IN WHICH THIS NOMINEE EXHIBITS LEADERSHIP** **(PLEASE CHECK ALL THAT APPLY.)** **THIS TEACHER IS A --**
	Mentor to new teachers and other colleagues
	Specialist (math, for example)
	Department chairperson
	Education association leader or representative
	Team or grade-level leader
	Member of School Improvement Team
	Representative to Superintendent's Advisory Committee
	Clinical faculty for student teacher supervision
	Other leadership role (please identify)
	TOTAL # OF ✓'S

PRINCIPAL'S SIGNATURE: _____SCHOOL:_____
Thanks for your help. Please return this form to **Becky Danello** in the enclosed envelope by **August 10, 2004.**

APPENDIX B

INFORMED CONSENT FOR PARTICIPANT OF INVESTIGATIVE PROJECT
Virginia Polytechnic Institute and State University

Title of Project: First Fellowship Then Followership: Training for a New Generation of Teacher Leaders
Principal Investigator: Rebecca Davis Danello

I. THE PURPOSE OF THIS RESEARCH/PROJECT

The purpose of this study is to describe how prepared teachers feel as they assume positions of leadership and what training or professional development they feel might make them more effective in their leadership roles. Data drawn from interviews, observations, and documents will be analyzed and compared to develop individual teacher case study portraits, as well as a cross-case analysis that may provide insight into the processes and factors influencing the development of teacher leadership and a guide for creating a professional development program to address their needs.

II. PROCEDURES

Interviews will be conducted with nominated teacher leaders a minimum of three times lasting approximately 45 minutes each session at a time and place that is convenient for them. In addition, nominated teacher leaders will be observed at least once engaged in a leadership activity of their choice and will complete a minimum of three electronic journals and a portfolio of artifacts representing their growth as leaders. The researcher is not evaluating the participants or their performance in any way; rather they will be helping the researcher to evaluate the needs of teacher leaders and the possible response that a school system might make to those needs. All information will remain anonymous. Only the participants' words and actions will be noted as the study progresses. Participants may be asked questions during and after the evaluation, in order to clarify my understanding of your evaluation.

Data collection will require approximately four months of sporadic participation by the individuals involved. Participants may terminate their participation at any time for any reason.

III. RISKS

There are no known risks to the subjects of this study.

IV. BENEFITS OF THIS PROJECT

Participation in this project will provide information that may be used to improve the identification and professional development of teacher leaders. No guarantee of benefits has been made to encourage any participate. Participants may receive a synopsis summarizing this research when completed

V. EXTENT OF ANONYMITY AND CONFIDENTIALITY

The results of this study will be kept strictly confidential. The participant's written consent is required for the researcher to release any data identified with him or her as an individual to anyone other than personnel working on the project. The information provided will have the participant's name removed and only a subject number or pseudonym will identify the participant during analyses and any written reports of the research.

The interviews may be audiotaped and/or videotaped. If they are taped, the tapes will be stored securely, viewed only by the researcher, and erased after three months. If the experimenter wishes to use a portion of the audiotape and/or videotape for any other purpose, she will get your written permission before using it. Your signature on this form does not give her permission to show your videotape to anyone else.

VI. COMPENSATION

Participation is voluntary and unpaid. However, teachers will be awarded recertification points under Option 10 of Stafford County Public Schools application of the Virginia Department of Education's licensure renewal guidelines.

VII. FREEDOM TO WITHDRAW

Participants are free to withdraw from this study at any time for any reason.

VIII. APPROVAL OF RESEARCH

This research has been approved, as required, by the Institutional Review Board for projects involving human subjects at Virginia Polytechnic Institute and State University, by the Department of Educational Leadership and Policy Studies, and by the school district.

IX. SUBJECT'S RESPONSIBILITIES AND PERMISSION

I voluntarily agree to participate in this study, and I know of no reason I cannot participate. I have read and understand the informed consent and conditions of this project. I have had all my questions answered. I hereby acknowledge the above and give my voluntary consent for participation in this project. If I participate, I may withdraw at any time without penalty. I agree to abide by the rules of this project

_____	_____
Signature	Date
_____	_____
Name (please print)	phone
_____	_____
Address	e-mail address

Should I have any questions about this research or its conduct, I may contact:

Investigator: Rebecca Danello Phone (540) 658-6685
Doctoral student, Educational Leadership and Policy Studies
e-mail: rdanello@vt.edu

Instructor: Dr. Steve Parson Phone (703) 538-8481
Professor, Educational Leadership and Policy Studies
e-mail: parson@vt.edu

Review Board: David M. Moore Phone (540) 231-4991
Chair, IRB
Research Compliance Office
CVM Phase II (0442) Virginia Tech

Appendix C
Participant Letter

645 Wright Drive
Ruther Glen, Virginia 22546

May 30, 2004

Dear Teacher:

I am preparing to embark on a study of teacher leadership as part of my doctoral work in Educational Leadership and Policy Studies from Virginia Polytechnic Institute and State University. The School Board and administration have granted permission for me to conduct my study using teachers from elementary, middle, and high schools in Stafford County Public Schools. My intent is to discover what knowledge, skills, and dispositions practicing teachers say they need in order to help their colleagues and students be more productive and successful.

Recently, I requested help from principals in nominating teachers from their schools. Your name was sent to me. I am now inviting you to participate in the study I will conduct. The study will involve interviews, some electronic journaling, an observation, and an artifact collection, and will span approximately three months. From the nominated population, I will select a sample that represents a range of experience, teaching assignments, gender, and instructional levels. The sample will come from those who return the attached consent form. I will accept volunteers until my selection criteria have been satisfied, probably four to eight subjects.

Should you agree to participate, your correspondence and contributions will be treated with the utmost respect and privacy, and you will be identified with a pseudonym in the dissertation itself. I will also verify the accuracy of details and quotations contributed by participants in the study by allowing you to review the presentation of data. Once the dissertation is completed, each participant will receive a copy of the findings.

I hope you will seriously consider participating in the study. If you have additional questions, please contact me at 658-6685.

Sincerely,

Becky Danello
Doctoral Candidate at Virginia Tech

Appendix D

Data Management Matrix for Selection of Sample from Population of Administrator-nominated Teacher Leaders

	MALE	**FEMALE**
Fewer than 7 years of experience		
7 + years of experience		
English		
Math		
Science		
Social studies		
Elementary		
Middle		
High		

Teachers with the highest scores (greatest number of checks) from the Teacher Leader Nomination Form (see Appendix A) will be entered in the matrix first.

Appendix E

Participant Profile Sheet

Name_____

Age_____**Total Years of Experience in Education**_____

Total Years of Experience in Stafford County Public Schools_____

Total Year of Experience in current school_____**Highest degree obtained**_____

Any special endorsements to your teaching license_____

Current teaching assignment (grade level and subject area)_____

The following statements are meant to determine the influence of others on your development as a teacher. Please check all that apply:

- ❑ My principal has been a primary influence on my growth as a teacher.
- ❑ My assistant principal has been a primary influence on my growth as a teacher.
- ❑ A school colleague has been a primary influence on my growth as a teacher.
- ❑ A central office administrator has been a primary influence on my growth as a teacher.
- ❑ A community person has been a primary influence on my growth as a teacher.
- ❑ An educator outside this school district has been a primary influence on my growth as a teacher.
- ❑ I have received formal training via college, graduate-level courses, or professional development seminars and conferences that helped me grow as a teacher.
- ❑ I network with others via membership in professional organizations and attendance at workshops outside my school district.
- ❑ Participation on school and district committees/activities has been a primary influence on my growth as a teacher.

The following represent typical roles of teachers. Please check all that apply to you:

- ❑ Mentor to new teachers and other colleagues
- ❑ Specialist (math, for example)
- ❑ Department chairperson
- ❑ Education association leader or representative
- ❑ Team or grade-level leader
- ❑ Clinical faculty for student teacher supervision
- ❑ Representative to Superintendent's Advisory Committee
- ❑ Representative on School Improvement Team
- ❑ Other leadership role (please identify)

The following are characteristics that are typically descriptive of teachers. Please check all that apply to you:

I --

- ❑ Am a life-long learner or hold advanced degrees
- ❑ Have taught on several grade levels
- ❑ Am considered a content expert
- ❑ Possess a global view of education and my impact beyond the immediate classroom
- ❑ Am organized
- ❑ Am flexible
- ❑ Am positive
- ❑ Am active in community and/or political organizations
- ❑ Am seen as a leader by my peers
- ❑ Model courage
- ❑ Model perseverance and patience
- ❑ Believe that serving others is the keystone of leadership
- ❑ See myself as an agent of change
- ❑ Model collaboration and sharing
- ❑ Motivate others

If you wish, briefly tell anything else that you think is important for me to know about you as a teacher. (Awards, special recognition, accomplishments, activities, experiences, etc)

_____
_____
_____
_____

Appendix F

Interview Protocol

Subjects in this study will participate in two semistructured interviews of approximately 45 minutes to one hour each. The first interview will focus on the teacher leader's perception of his or her self-definition and role, evolution, training and professional development. The second interview will focus on the teacher leader's perception of effectiveness and success in the role of teacher leader. All interviews will be audiotaped and when appropriate and convenient videotaped. Interviews will occur in the teacher leader's classroom or school or any other place of the interviewee's choosing. Questions will be modeled after Patton's approach to the standardized open-ended interview (1990) and posed so as to encourage participants to respond freely. When necessary to clarify or motivate responses, probing questions will be interjected. Background or demogaphic questions will be unnecessary as each subject will have already completed a written questionnaire.

Interview #1 Focus:

Definition of Teacher Leadership and Description of Teacher Leaders

This interview is being conducted as part of my doctoral study on teacher leadership. You have received a consent form to sign, which indicates your knowledge of the protocol to be used and your consent to this interview as part of that research protocol. The interview will be recorded unless you have any objections.

Prompts and probes:

1. There are many definitions of teacher leadership and many descriptions of teacher leaders themselves. But first, I'm interested in knowing how <u>you</u> would describe a teacher leader.
    a. What kinds of knowledge and skills would he or she possess?
    b. What kinds of character and personality traits would he or she possess?
    c. What kinds of educational background and preparation would he or she have?
2. What are the kinds of things that I might see teacher leaders doing at your school?
    a. How would they be interacting with their principals?
    b. How would they be interacting their colleagues?

Interview #2 Focus:

Teacher Leaders' Professional Relationships and Preparedness for Leadership

This is the second interview in our conversation about teacher leadership. You have signed a form giving your consent to participate and for me to use information garnered in our interviews in my doctoral dissertation. This interview is being recorded.

Prompts and probes:

1. Describe some of the professional activities in which you are involved.
    a. In what kinds of activities are you involved at your school?
    b. In what kinds of activities are you involved outside your school, for example, in the larger educational community?
2. Describe some of the professionals with whom you work daily, as well as those with whom you associate in professional organizations.
    a. Describe your role in working with your fellow teachers.
    b. Describe your role in working with first-year or new teachers.
    c. Describe your role in working with your school's administrators.
    d. Describe your role in working with district administrators.
    e. Describe your role in working with colleagues in outside professional organizations.
3. Talk to me about the kinds of professional experiences that you think you need to pursue in order to grow in leadership.
    a. What skills and knowledge do you think you might need?
    b. What intrapersonal and interpersonal skills do you think you might need?
4. Imagine there were a training program for teacher leaders. If I were to attend this training program for teacher leaders, what would it look like?
    a. Where would it be happening?
    b. Who would be running it?
    c. When would it be occurring?
    d. What would be in the curriculum?
    e. Who would be in attendance?

Appendix G

Protocol for Electronic Journal Entries

Participants in this study will submit a minimum of three electronic journal entries on topics posed by me as well as the participants themselves. The topics will come from the interview sessions, observations, and artifact collections, and they will serve to broach new territory not anticipated by the interviewer/observer as well as to elucidate or expand on data collected from these previous activities. Although three prompts are described below, the latter two may be replaced or augmented by topics that surface in the process of collecting data from interviews, portfolios, observations, or other journal entries.

Prompt #1:

Since our initial interview, you have had time to reflect on our conversation about teacher leadership. What, if anything, did you think of later that you'd like to tell me now? If you can think of nothing, what territory related to teacher leadership would you like to explore? Why? Please respond in a minimum of one page double spaced within two weeks.

(Possible) Prompt #2:

Reflect on the observation I just did of you engaged in a leadership activity. What aspects of the activity were the most successful for the audience? What aspects were the most fulfilling for you? Why? What would you do differently, if anything, if you had to repeat this activity? Why? How would you train someone else to do this activity if you had to find a replacement for yourself? Please respond in a minimum of one page double spaced within two weeks.

(Possible) Prompt #3:

I hope that one of the benefits of my study has been the self-scrutiny of its participants – you. The busyness of our profession often precludes time for self-reflection, one of the straightest avenues to self-growth. Please share some self-revelations or just simple insights to professional development and growth of teacher leaders. This information may have come as a result of additional reading, dialogues with colleagues, or simple focused thought over the last few months. Please respond in a minimum of one page double spaced within two weeks.

Appendix H

Observation Field Notes Matrix

For information on the instrument and protocol used, please contact Rebecca Davis Danello at rdanello@vt.edu.

Appendix I

Directions to Teacher Leaders for Artifact Collections

The artifact collection is a compilation of artifacts that represents a repertoire of achievement in a particular area of interest or study. Like a photograph album or "scrap" book, it contains items that the owner values, mementoes of milestones, and symbols of significant events that sometimes speak to the outside viewer in ways that mere words could not.

During the next three months, you will collect artifacts to incorporate into a professional portfolio that will represent to the investigator your interest, accomplishment, training, or development as a teacher. You must include a minimum of five artifacts, but you may include more. You may take this opportunity to include artifacts that elaborate further on topics that we discuss in our interviews or electronic journals, show a facet of your own leadership, take an avenue to nonverbally promote your achievements, and/or extend your interest or indicate a direction in teacher leadership you'd like to explore. The artifacts may represent both positive and negative activities or characteristics and a range of your development including past as well as current items.

Each artifact will be accompanied at minimum by a two-paragraph description/explanation. The first paragraph will identify and describe the artifact; the second paragraph will explain why you included it.

Each artifact collection or portfolio will be returned to the participant at the conclusion of the study.