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Challenging Our Sense of Ourselves: Teacher Leaders' Transformative Learning Experiences

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Abstract

It is important to understand the ways teacher leaders undergo a transformation of their professional selves as they move from being a teacher to teacher leader. This qualitative study examined the ways teacher leaders made sense of their teacher leadership experiences, thus, exploring the changes in their beliefs, values, and perspectives as they expand their educational capacity in that role. This study used transformative learning theory as the framework to explore the phenomenon. Transformative learning theory is a theory of adult learning and is understood as a way of making meaning of our experiences that "transforms problematic frames of reference to make them more inclusive, discriminating, reflective, open, and emotionally able to change" (Mezirow, 2000). The empirical and practical literature on teacher leadership was synthesized to depict the emerging role in K-12 schools in the United States. Semi-structured interviews and focus group were used as the data collection tool. The constant comparative method (Glaser & Strauss, 1967) was used to analyze the research data which led to the development of a coding system. Categories were created from the codes which became the themes and concepts used to aid in the understanding of how the participants made sense of their teacher leadership experiences. The participants encountered challenges that included identity ambiguity, a shift from student to adult learning, and confidence in the role of a teacher leader. However, the participants did not allow these challenges to defeat them, therefore, the participants used their sense of agency to grow as educators by building their content and leadership capacity. The transformative learning experiences the participants underwent as teacher leaders helped to shape who they are today as educators. The study concludes with limitations, implementations, and recommendations for future teacher leadership research.

CHALLENGING OUR SENSE OF OURSELVES: TEACHER LEADERS' TRANSFORMATIVE LEARNING EXPERIENCES

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Acknowledgements

In the summer of 2014, I began the journey towards achieving a doctorate degree in education, specifically, a Ph. D. in Teaching and Curriculum from Syracuse University. The path I choose was not a traditional one. I am a 21-year veteran educator, who taught at the elementary level for ten years, then worked as an educational administrator for the last ten years of my career. This journey would not have been possible without the wonderful support system I have in my life.

Since I was a child, my grandparents were role models and an inspiration to me. They instilled in me, the value of hard work, determination, and the drive to create a meaningful life. My drive to be a life-long learner and educator was first recognized by my grandparents. Today, my parents continue on with this legacy left by my grandparents. They too inspire me to follow my dreams.

When I decided to move forward with this degree, my husband Mark, encouraged me all the way. He continually tells me how proud he is of all my accomplishments in my career. It was not always easy for him to go on this journey with me and I greatly appreciate his continuous support. Often times, I can be too much of a serious person (no secret to anyone) and Mark knows how to bring the "fun" out of me-thank you for that!

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In the transformation of meaning lies
the meaning of transformation (Daloz, 1999).

Chapter 1: Introduction

Personal Connection to Teacher Leadership

A little over five years ago, I was visiting my good friend, Lynne, during the summer school break. Lynne shared with me that she was going to work as a teacher leader during the coming school year. Lynne expressed that she has been a sixth grade English teacher for the last twelve years and was looking forward to this new opportunity in her career. She was going to support teachers with content knowledge and pedagogy, in order, to improve student learning. Lynne's school district partnered with a regional education organization, which collaborated with a local college to offer her a teacher leadership development program that would prepare her for the role. She was looking forward to becoming the facilitator for the school's improvement committee and collaborate with other educators from her district on special projects. As Lynne was sharing this good news with me, I noticed the excitement in her voice and on her face. It reminded me of how I felt when I first began my career as a teacher. Lynne's enthusiasm for the opportunity to be a teacher leader in her district prompted me to learn more about teacher leadership. While some teachers get tired and burned out, Lynne felt rejuvenated by this opportunity. It was an opportunity to move up the career ladder, which is uncommon for professional educators who are public school teachers.

This conversation certainly initiated thoughtful contemplating, on my part, about teacher leadership. I became interested in learning if other teacher leaders felt the same way. I sought to learn how teacher leaders prepare for their roles and responsibilities. Most of all, I am captivated

in learning how the teacher leader experience transforms educators' perspectives and if they experienced a change in their professional selves.

I related to Lynne's longing to grow and expand her knowledge as an educator. Twenty-one years ago, when I started my career as a classroom teacher, the opportunities to become a teacher leader were sparse. At that time, districts relied solely on the building principal to be the instructional leader. So, I looked for other ways to expand my career and after ten years of teaching, I took the route of administration. Along this journey, I became more knowledgeable and experienced in educational areas that were unfamiliar to me. My beliefs, values, and perspective changed and I was transforming as an educator. My knowledge and understanding of the field was evolving because I was advancing my education to obtain an administration degree and I was exposed to new experiences as an educator. My prior perspective of K-12 education was about doing what is best for the students, these new experiences expanded my perspective helping me to realize the adults (teachers and other staff) also needed support and guidance. I was learning how to build relationships with educators, to value their thoughts and perspectives on education, be sensitive to other's needs, and my beliefs on how adults (teachers and other staff) learn. I learned to see the educational system from various perspectives. For example, when I was a teacher, I was provided a small classroom budget to purchase supplies and resources for student learning. As an administrator, I grew to realize the impact the district budget process has on either providing the resources or technologies for student learning or learning how to be resourceful to find other ways to gain the resources for students such as through grant opportunities. My perspective of the district budget, which at that time was entirely of only student needs, changed to understand the budget encompasses many spheres such as staff salaries, benefits, facilities maintenance, transportation costs, and so much more.

As my experiences and education continued to expand, I revisited through reflection, my beliefs, values, and perspectives, as these are ever-changing.

At a later visit with Lynne, I asked her why she thought her school district was investing in the idea of teacher leadership. Lynne expressed the district's superintendent and assistant superintendent believed schools have become very complex organizations and they noticed teachers often were not given the opportunity to take part in the decision making process, or to become change agents in their schools or districts. The administration sought to empower teachers to become more involved and take on roles that would help with school improvement. Meeting with Lynne, again, reinforced my curiosity on the topic of teacher leadership. By this point, I sought to learn more about teacher leadership and how the opportunities for teachers to step into these roles were growing. What did Lynne's administration mean by schools have become very complex organizations and why are administrators seeking support from teachers in the role of teacher leaders? As a doctoral student in the field of education, it is important for me to help expand the field's knowledge on the topic of teacher leadership and seek the answers to these questions.

Background of the Study

Within the last two decades, the United States Department of Education has called for a restructuring of schools to improve the profession of teaching and student learning. During the Obama administration, numerous educational reforms (e.g. Race to the Top, Elementary and Secondary Education Act (ESEA), and Common Core Standards) occurred to ensure that every child received the education he or she deserves (Race to the Top Funds, 2016). These reforms took place at the federal, state, and district level. According to the U. S. Department of Education,

> The reforms sought to make improvements in the critical elements of education systems: excellence in teaching and school leadership; high standards for what every student should know and be able to do; next-generation assessments and data systems used to drive school improvement; and technology infrastructure to support 21st century learning (Progress in Our Schools, n.d.).

As one part of these reforms, the U.S. Department of Education along with many state education departments, are working to "catalyze fundamental changes in the culture of schools and the culture of teaching so that teachers play a more central role in transforming teaching and learning" (Teach to Lead, 2017). "Specifically, the concept of teacher leadership suggests that teachers rightly and importantly hold a central position in the way schools operate and in the core functions of teaching and learning" (York-Barr & Duke, 2004, p. 255). Teacher leadership has provided opportunities for shared decision making, collaborative interactions among teachers, and reflection of current practices. Furthermore, opportunities for teacher leadership help teachers to move up the career ladder and advance their involvement in the field of education (Teacher Leader Effectiveness, 2014).

Barth (2001), asserts that many people are needed to run the organizational operations of a school and a principal cannot do this alone. "The most reliable, useful, proximate, and professional help resides under the roof of the schoolhouse with the teaching staff itself" (p. 445). Shedd and Bacharach (1991) evoke that teachers are a powerful resource to school districts by adding to the shared decision making process, curriculum implementation, and professional development. According to Stone, Horejs, and Lomas (2012), "As schools work through school improvement and restructuring issues while trying to improve the teaching

profession, teacher leadership is a critical component…the change efforts are multifaceted and require the leadership, "buy-in," and the work of many, not just the principal" (p 50). Lieberman (1992) states "teacher participation in leadership may be the most critical component of the entire process of change" (p. 159).

Hence, schools today face major state and federal accountability challenges to assure student achievement. "This is a heavy load for schools and teachers! It is made all the more difficult by the shifting demographics of the student population….and the reduced role of government in supporting and solving local problems" (Lieberman, 2011, p. 16). With increasing importance placed on academic standards and school accountability; multiply forms of leadership, particularly, teacher leadership is rising. In 2012, the *Teacher Leadership Exploratory Consortium* created standards that helped to prepare teacher leaders and school districts to transform education. These changes in the educational landscape in the United States gave rise to a growing interest among scholars on the topic of teacher leadership. During the early research on teacher leadership, Smylie (1995) notes, few studies of teacher leadership used formal theory and research questions to guide inquiry and findings. The emerging or more recent literature has studied the characteristics of teacher leadership and its impact on the organizational structure (Bell & Locke, 2014; Bond & Hargreaves, 2015; Lieberman & Miller, 2004; Margolis & Huggins, 2012; Neumerski, 2012; Smylie & Brownlee-Conyer, 1992; Smylie & Denny, 1990; Weaver-Hart, 1994; York-Barr & Duke, 2004). Evidence from the literature proves that teacher leadership is an important piece in achieving both school and classroom improvement (Danielson, 2007; Davidson & Taylor, 1999; Fullan, 1994; Gronn, 2000).

Results of Preliminary Studies

I organized two pilot studies on the topic of teacher leadership prior to this dissertation. The first qualitative study was conducted in 2015, as part of a research apprenticeship. Seven district level administrators who were responsible for supervising teacher leaders were involved in the study. These administrators were part of an interview methodology research project. The study intentionally focused on the perspectives of district level administrators and their understanding of teacher leadership positions within their districts.

The district level administrators acknowledged their districts valued the investment in building the capacity of teachers to become leaders. They understood the impact teacher leaders had on influencing the instructional practices of colleagues and by taking part in school/district-level decision making. One participant shared that empowering their teachers to become instructional leaders led to more "buy-in" from other teachers and a stronger feeling of collegiality among staff. This participant acknowledged the role of teacher leaders in the district was to model lessons for teachers and to help teachers with instructional planning. Participants also shared that teacher leadership added to the professional culture in a building and within a school district. Teacher leaders, in a sense, were role models who demonstrated best teaching practices. The findings from this study indicated that teacher leaders are valued as change agents who support the work of school/district improvement. As the researcher, I wondered if the change occurring in the school/district as a result of teacher leadership support had an effect on the way teacher leaders perceived themselves as educators. This inquiry lead to a second pilot study that examined the role of teacher leaders from their perspective.

In 2016, I conducted a second qualitative pilot study which was part of coursework. I interviewed five teacher leaders in order to learn their perspectives on teacher leadership. Three

of the five were former teacher leaders who had moved on to administrative roles in other districts. The other two were currently teacher leaders who taught part or all of the school day. The findings from this study indicated the participants recognized content development training and leadership preparation as key parts of learning how to be a teacher leader. The participants felt their teacher leadership preparation increased their credibility with teachers and administrators. The participants experienced teachers wanting their support and turning to them for advice. Their administrators worked collaboratively with them, seeking their knowledge in shared decision making. While in conversation with the five teacher leaders, they reflected on how their teacher leadership experience brought on feelings of confidence, excitement, surprise, and disappointment. One participant shared her disappointment in herself after facilitating professional development for a group of teachers. She realized that her format for conducting the professional development caused a few teachers to lose interest in the topic, in turn, may have impacted their classroom practice. While reflecting on the professional development training, this participant realized she needed to change her approach as a facilitator. She also realized this experience helped her to grow as an educator.

During my data analysis, I was able to construct themes from similar statements other participants shared. Some of the themes constructed centered on current beliefs and values in education, sense of identity, and transformation of oneself. Thus, this study opened my mind into an area of teacher leadership with limited empirical research studies found in the literature.

Focus of the Study and the Research Question

Many concepts and findings from research on teacher leadership have refined the phenomenon to understand that teacher leaders are a large part of helping to improve school performance by "…placing teachers in positions of leadership and decision making, thus

providing more expertise for school improvement" (Stone, Horejs, & Lomas, 1997, p. 51). Teacher leadership continues to be a growing area of study, however, the research on teacher leadership remains largely on the work teacher leaders *do* in their schools/districts to help with improvement. A few studies have validated the effects on teachers in the role of teacher leaders. Several researchers learned of the psychological outcomes for teachers in the role of teacher leader. Muijs and Harris (2003) found, teachers' self-esteem and work satisfaction increased when they are empowered as leaders, which in turn leads to higher levels of performance, retention in the profession, and reduced feelings of alienation. Clemans, Berry, and Loughran (2012) found in their research, as teacher leaders gain leadership experience, their confidence grows as leaders and educators. The teachers involved in this study discussed there is a sense of professional validation or being a part of bigger things and not isolated to the classroom (p. 295). A few researchers acknowledge teacher leaders experience a motivational increase when conducting meaningful work (Carver, 2016; Smylie, 1994; York-Barr and Duke, 2004). Carver (2016) learned when teacher leaders saw themselves as leaders, they felt empowered in their personal lives as well and set out to led community organizations or set personal goals.

A small number of researchers have studied teacher leaders' perceptions of their job role and of themselves as leaders. LeBlanc and Shelton (1997) studied teacher leaders' views of their job roles. LeBlanc and Shelton identified the participants in their study had two specific needs-achievement and affiliation. To obtain achievement as teacher leaders, the participants valued lifelong learning in terms of keeping up with the current pedagogical knowledge in the field. LeBlanc and Shelton also learned that people with a high achievement need tend to be internally motivated, relying on their own effort and abilities. The data from this study also provided evidence that teacher leaders are people with a strong affiliation need, they want to be liked and

accepted by their peers. The participants were people who have a tendency to be sensitive to others and work to build relationships with their peers.

Other researchers (Ovando, 1996; Porter, 1986; Ryan, 1999; Smylie, 1994; York-Barr & Duke, 2004) who studied teacher leaders' perceptions of their job role acknowledged as teachers lead, they improve their leadership along with their organizational perspective. Some teacher leaders change and improve their instructional practices because of their exposure to new information and practices through observations and interactions with others. Teacher leaders may experience change and improvement in their practices as they conduct research on pedagogy, content, and the organizational structure.

There is much to learn on how teachers grow to be teacher leaders and the ways in which teacher leaders transform as educators. Therefore, this dissertation seeks to understand the ways former teacher leaders define who they are as professionals while reflecting on their experiences as a teacher leader. The purpose of my qualitative study, henceforth, is to provide a significant contribution to the development of the current thinking on teacher leadership. Furthermore, in the growing body of literature on teacher leadership, former teacher leaders have not been studied. By studying former teacher leaders, this research seeks to examine how these educators make meaning of their experiences that created a transformation of their professional selves. The rationale for recognizing former teacher leaders is due to the in-depth responses received from the interviews with former teacher leaders during my second pilot study. Former teacher leaders had time away from the role, thus, reflecting on their knowledge and experience, to communicate specific details of how they make meaning of their professional transformation (Mezirow, 1991).

In order to frame my research, I utilized the research question: *How have former teacher leaders made sense of their experiences after leaving that role?* The goal of this dissertation is to provide the education field further knowledge and understanding on the research topic of teacher leadership. In chapter 2, I synthesize the empirical and practical literature on teacher leadership to depict the emerging role in K-12 schools in the United States. Following the literature review, I discussed the theoretical framework of transformative learning as a guide for this research study in explaining and understanding the phenomena. In chapter 3, I detail the methodology for the study which includes the study design and the procedures for the data collection. Chapter 4, 5, and 6 include the findings from the study. Chapter 4 explores the challenges the participants' encountered during their time as teacher leaders leading to a deeper understanding of their experience. Chapter 5 examines the participants use of their sense of agency to grow as educators. Chapter 6 looks into the transformative experience of teacher leadership in shaping who the participants are today as educators**.** Finally, in chapter 7, the dissertation concludes with implementations, limitations, and recommendations for the study.

Chapter 2: Literature Review

Since teacher leadership is a flourishing concept in public education, it is important, to look at how this concept has developed over time. This literature review begins with a brief historical look at teacher leadership. I examine various definitions of teacher leadership and include the numerous roles and responsibilities of teacher leaders. I explore the conditions that influence teacher leadership and what is being done to increase teacher leadership opportunities. The second part of this chapter focuses on the theoretical framework of transformative learning theory and its connection to the teacher leadership phenomena. I ground this study in transformative learning theory and use it as the lens to interpret and understand the findings.

Review of Teacher Leadership Literature

In this section, I synthesize the empirical literature on teacher leadership. A brief historical context of teacher leadership is included to understand how this position in education has evolved over time. I present the various definitions of teacher leadership used in the field and how these definitions are shaped by the roles and responsibilities of teacher leaders within their school/district. I examine the call for teacher leadership and the conditions that influence teacher leadership that include recent educational reform movements. Funding for teacher leadership positions in schools and districts is explored.

Brief Historical Context of Teacher Leadership

In the past, the teacher roles in schools had been providing knowledge to her students within the classroom setting. Teachers had little input into the overall school organization. "Historically, schools have been hierarchical, bureaucratic, top-down organizations that have not

encouraged teacher leadership" (Stone, Horejs, & Lomas, 1997, p. 50). Troen and Boles (as cited in Stone, Horejs, & Lomas, 1997) remarks,

> Teaching is not a profession that values or encourages leadership within its ranks. The hierarchical nature of public schools is based on the 19th century industrial model, with the consequent adversarial relationship of administration as management and teachers as labor. Like factory workers in the 1800s, teachers all have equal status. Leadership opportunities are extremely limited (p.50).

Traditionally, teachers assumed limited formal leadership roles in schools. Past leadership roles for teachers may have been as union representatives, department chairs, and members of advisory committees. The structure of the school environment may have led to these limited leadership roles.

In 1986, the Holmes Group and the Carnegie Task Force published recommendations for strengthening teaching as a profession. According to the report *Teachers for the 21st Century* (Carnegie Task Force, 1986) and *Tomorrow's Teachers* (Holmes Group, 1986), teachers are professionals who have the expertise needed to do their work and thus, schools should be organized in such a way that builds collegial relationships among professionals rather than suffused with bureaucracy. These reports suggested restructuring schools to give teachers more autonomy over their professional practices. These two documents called for changes in existing educational policies in order to increase student achievement and to create a teaching profession equal to that task (Stone, Horejs, & Lomas, 1997, p. 50).

Since the publication of these key reports, the teacher profession begun to see an evolution of teachers becoming leaders in their school. Silva, Gimbert, and Nolan (2000) documented three different waves of teacher leadership progression. During the first wave of teacher leadership, teachers held roles that focused on the effectiveness and efficiency of the system. Examples of these roles were department head, master teacher, and union representative. The first wave of teacher leadership as described by Frymier (1987) limits teachers by using them as "managers" and has teachers "neutered" by the bureaucratic routinization of teaching and administrative control.

A second wave of teacher leadership emerged recognizing the limitations of the first wave and acknowledged the importance of teachers as instructional leaders. This second wave created positions such as team leader, curriculum developer, and staff developer (Silva, Gimber, Nolan, 2000). These positions were often held by teachers who work full time outside of their work with classroom teachers or outside their work with their own classroom. Rather, than working with and empowering teachers, these second wave teacher leaders remotely controlled teachers by preparing materials for them to use in their classrooms. The second wave of teacher leadership has highlighted the importance of empowering teachers and has led to the third wave of teacher leadership.

The third wave of teacher leadership values collegiality and professionalism (Silva, Gimbert, & Nolan, 2000). Leadership becomes a part of the work in the teachers' classroom to help students' learn. At the time of the third wave of teacher leadership, there was no discussion in the literature pertaining to this concept. According to Sergiovanni and Starratt (1998), teachers had not been encouraged to work with building and district administrators on school restructuring of the core work of a teacher, in which, is teaching and learning (p. 156). During

this educational time, teacher leadership was a challenge to the typical hierarchical structure of schools. It dispersed leadership responsibility across educators, which was a new idea for many school and district administrators to comprehend (Silva, Gimbert, & Nolan, 2000).

At the present time, teacher leadership has become imbedded in the school reform movement. "With the increase interest in site based management and shared decision making, avenues have been created to expand teacher leadership" (Stone, Horejs, & Lomas, 1997, p. 51). The challenge for schools today is to ensure that all students are prepared with the skills and knowledge needed for the 21st century. Schools are faced with preparing students to be college and career ready by the end of high school (Lieberman 2011). These new educational reforms seek to restructure schools and redefine the roles and responsibilities of teachers. Bond and Sterrett (2014) affirmed, "Policymakers, researchers, and educators are calling for teachers with in-depth knowledge of students, subject matter, and pedagogy to assume formal and informal leadership roles in schools" (p. 25). Recent educational reform movements have created initiatives to improve the quality and effectiveness of teaching. They aim to introduce conformity through standardized curricula, rigorous requirements for student performance, and teacher evaluation (Smylie & Denny, 1990). These new educational reforms seek to restructure schools and redefine the roles and responsibilities of teachers and administrators. "On the crest of this wave is the development of new leadership roles for teachers" (Smylie & Denny, 1990, p. 236). In the following section, teacher leadership roles are defined.

Defining Teacher Leadership

As the concept and the ways of thinking about teacher leadership evolve, researchers who study this phenomenon make efforts to define this form of leadership (Cosenza, 2015; Murphy, 2005; York-Barr & Duke, 2004). Throughout the literature, it seems that teacher leadership has

been difficult to define due to the varying roles teacher leaders play in the school environment (Murphy, 2005). "Very few authors provide what would be considered a definition of teacher leadership. The lack of definition may be due, in part, to the expansive territory encompassed under the umbrella term "teacher leadership" (York-Barr & Duke, 2004, p. 260). This section articulates on various definitions of teacher leadership provided from researchers in the field. *Figure 2.1* illustrates these definitions in a graphic format. Including the various teacher leadership definitions in the literature review help to further describe the phenomenon and acknowledges that teacher leadership is not always clear to understand. Moreover, as teacher leadership has been defined in a variety of ways in past decades, making distinct comparisons across the literature has been difficult (York-Barr & Duke, 2004).

Wasley's (1991) qualitative work on teacher leadership involved three in-depth case studies of teacher leader participants using observations and interviews. Wasley's findings concluded that teacher leadership is complex and the roles of teacher leaders involved power, authority, decision-making relationships, collaboration, and communication of teaching and learning beliefs. Wasley defined teacher leadership, as "the ability to encourage colleagues to change, to do things they wouldn't ordinarily consider without the influence of the leader" (p. 23).

Katzenmeyer and Moller (2009) arrived at their definition of teacher leadership, after a review of the educational literature, careful consideration of their experiences, and much conversation with teacher leaders and their principals around the country (p. 5). Katzenmeyer and Moller (2009) state, "This definition is an evolving work in progress as we continue our exploration and learning" (p. 5). Thus, Katzenmeyer and Moller (2009) define teacher leadership as, "[T]eachers who are leaders lead within and beyond the classroom, identify with

and contribute to a community of teacher learners and leaders, and influence others towards improved educational practice" (p. 5). Katzenmeyer and Moller (2001) see teacher leadership as having three main facets:

- Leadership of students or other teachers: facilitators, coach, mentor, trainers, curriculum specialist, creating new approaches, leading study groups;
- Leadership of operational tasks: keeping the school organized and moving towards its goals, through roles as head of department, action researcher, member of task forces;
- Leadership through decision making or partnership: membership of school improvement teams, membership of committees, instigator of partnerships with business, higher education institutions, LEA's, and parent-teacher associations (p. 6).

Harris and Muijs (2003), conducted a research literature review of teacher leadership. Harris and Muijs (2003, p. 5) performed this research literature to:

- Interrogate the international research literature relating to teacher leadership
- Delineate different definitions and interpretations of the term 'teacher leadership'
- To explore the evidential base concerning teacher leadership and school/classroom improvement
- To investigate the barriers to teacher leadership
- To consider how teacher leadership can be enhanced or developed
- To identify areas for future research and development

Harris and Muijs researched literature on teacher leadership from the United States, Canada, and Australia. Based on their research, Harris and Muijs (2003) define teacher leadership as,

> The leadership of other teachers through coaching, mentoring, leading working groups; the leadership of developmental tasks that

> are central to improving learning and teaching; and the leadership of pedagogy through the development and modeling of effective forms of teaching (p. 40).

In a review of empirical and non-empirical literature about teacher leadership research, York-Barr and Duke (2004), reflected on the literature as a whole to construct a definition based on their findings. York-Barr and Duke (2004) suggest,

> [T]hat teacher leadership is the process by which teachers individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement (p. 288).

In 2008, the Teacher Leadership Exploratory Consortium was formed to examine the current research and thinking about the critical leadership that teachers play in contributing to student and school success (2012). The Consortium was a representation of a broad array of education organizations, state education agencies, teacher leaders, principals, superintendents, and institutions of higher education. "The Consortium members reviewed research, examined existing state-level teacher leadership programs, met the researchers, and learned from teacher leaders, who had experienced the challenges and successes of serving in those roles." (p. 4). These educators believe that,

> Teacher leadership is a potentially powerful strategy to promote effective, collaborative teaching practices in schools that lead to increased student achievement, improved decision making at the

> school and district level, and create a dynamic teaching profession for the 21st century (p. 3).

This group embarked on the development of model standards for teacher leadership. The purpose of the standards is, "To stimulate dialogue among stakeholders of the teaching profession about what constitutes the knowledge, skills, and competencies that teachers need to assume leadership roles in their schools, districts, and the profession" (p. 3). The Teacher Leader Model Standards consist of seven domains describing the many dimensions of teacher leadership (Teacher Leadership Exploratory Consortium, 2012, p. 9):

- Domain I: Fostering a Collaborative Culture to Support Educator Development and Student Learning
- Domain II: Accessing and Using Research to Improve Practice and Student Learning
- Domain III: Promoting Professional Learning for Continuous Improvement
- Domain IV: Facilitating Improvements in Instruction and Student Learning
- Domain V: Promoting the Use of Assessments and Data for School and District Improvement
- Domain VI: Improving Outreach and Collaboration with Families and Community
- Domain VII: Advocating for Student Learning and the Profession

According to the Consortium, "It is not expected that an individual teacher leader should or could embody the many dimensions of teacher leadership outlined in the Teacher Leader Model Standards. There are many contexts in which teachers can assume leadership roles and it is our hope that these Teacher Leader Model Standards will help expand opportunities for leadership within the teaching profession" (p. 9).

Often times, teachers are leaders from within their classrooms. Teachers may continue to teach students but also have an influence that extends beyond their own classrooms to others within their own school (Danielson, 2006). Thus, in Danielson's (2006) review of teacher leadership stated that teacher leadership is,

> [A] set of skills demonstrated by teachers who continue to teach students but also have an influence that extends beyond their own school and elsewhere, it entails mobilizing and energizing others with the goal of improving school and elsewhere. (p. 12)

Berg, Horn, Supovitz, and Margolis (2019), in their teacher leadership study, "map the landscape of teacher leadership programs across the U.S. and identify commonalities and distinctions amongst the range of programs" (p. 3). Thus, Berg, Horn, Supovitz, and Margolis (2019) created a typology of teacher leadership programs. For the purpose of this study on teacher leadership, in which, the ways teacher leaders made sense of their experience, the definition provided by Berg, Horn, Supovitz, and Margolis (2019) complements this research. Berg, Horn, Supovitz, and Margolis (2019) define teacher leadership in the following manner:

> Teachers' support of the improvement of teaching and learning beyond their own classroom…teacher leadership recognizes teachers' instructional expertise as an asset for educational improvement, capitalizes upon teachers' relationships with their colleagues to support change, and may provide career advancement opportunities to improve job satisfaction and the professionalization of teaching (p. 3).

In examining these definitions, despite the differences that exist between these definitions, the common understanding is that teacher leaders influence and contribute to improving teaching and student learning (Uribe-Florez, Al-Rawashdeh, & Morales, 2014). In the following section, the different roles occupied by teacher leaders is discussed to provide a clearer understanding of teacher leadership.

Definition	Researchers
"the ability to encourage colleagues to change, to do things they wouldn't ordinarily consider without the influence of the leader."	Wasley, 1991, p. 23
"teachers who are leaders lead within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders, and influence others towards improved educational practice."	Katzenmeyer and Moller, 2001, p. 17
"The Leadership of other teachers through coaching, mentoring, leading working groups; the leadership of developmental tasks that are central to improving learning and teaching; and the leadership of pedagogy through the development and modeling of effective forms of teaching."	Harris and Muijs, 2003, p. 40
"the process by which teachers individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement."	York-Bar and Duke, 2004, p. 288
"Teacher leadership is a potentially powerful strategy to promote effective, collaborative teaching practices in schools that lead to increased student achievement, improved decision making at the school and district level, and create a dynamic teaching profession for the 21st century."	Teacher Leadership Exploratory Consortium, 2012, p. 3
"a set of skills demonstrated by teachers who continue to teach students but also have an influence that extends beyond their own school and elsewhere, it entails mobilizing and energizing others with the goal of improving school and elsewhere."	Danielson, 2006, p. 12
"Teachers' support of the improvement of teaching and learning beyond their own classroom…teacher leadership recognizes teachers' instructional expertise as an asset for educational improvement, capitalizes upon teachers' relationships with their colleagues to support change, and may provide career advancement opportunities to improve job satisfaction and the professionalization of teaching."	**Berg, Horn, Supovitz, and Margolis, 2019, p. 3**

Figure 2.1 Various Teacher Leadership Definitions Provided by Researchers

Roles and Responsibilities that Help to Define Teacher Leadership. The roles and responsibilities of teacher leaders vary within the structure of the school or school district. At times, teachers take on leadership positions in a variety of ways such as full-time positions of leadership, full-time position as classroom teacher while also taking on various individual and collective leadership responsibilities, or part-time teacher and part-time leadership roles (York-Barr & Duke, 2004, p. 263). Lord and Miller (as cited in Neumerski, 2012) stated, "They [teacher leaders] may work in one school or across multiple schools or might represent an entire district or charter school network. Some focus on one subject area or grade level; others span multiple subjects and grades" (pp. 320-321). Smylie and Denny (1990) explain that in the course of restructuring, opportunities to collaborate and take initiative are available at every turn. The specific teacher leadership responsibilities that evolve are not prescribed as priori but are varied flexible, and idiosyncratic to individual school teams and their distinctive situation (Smylie and Denny, 1990).

York-Barr and Duke (2004) learned that teacher leadership roles may be demonstrated in informal ways, "…such as coaching peers to resolve instructional problems, encouraging parent participation, working with colleagues in small groups and teams, modeling reflective practices, or articulating a vision for improvement" (p. 263).

Stone, Horejs, and Lomas (1997), found that teacher leadership roles differed based on school levels-elementary, middle, and high school:

> At the elementary level, teacher leaders spent the majority of their time working with colleagues on a variety of professional activities such as staff committees, grade level leads, curriculum development, grant writing and implementation, and school site

> council. Middle school teachers…collaboration/sharing, collegial activities, staff development, mentoring, union activities, coaching, and club advisement. (The high school leaders) activities included leadership in school improvement, change efforts, staff development, curriculum and instruction, grant writing, staff committees, mentoring, technology, collaboration, and collegiality (p. 55).

In their article, Harrison and Killion (2007) discuss ten roles that teacher leaders could hold in their buildings. The authors saw that some of teacher leadership roles are assigned formally while others are informal and help to build the entire school's capacity to improve. Teachers can be resource providers and help their colleagues by sharing web sites, instructional materials, readings, and other resources to use with students. Teachers might share professional resources such as articles, books, lesson plans and assessment tools.

Teachers as instructional specialists help colleagues implement effective teaching strategies. Instructional specialists may study research-based classroom strategies and explore which instructional methodologies are appropriate for the school to share these findings with other teachers (Harrison & Killion, 2007).

Curriculum specialists are teachers who understand content standards and how various components of the curriculum link together. They understand how to use the curriculum in planning instruction and assessment. Curriculum specialists work with teachers on adopting curriculum and designing pacing guides (Harrison & Killion, 2007).

Classroom supporters work inside classrooms to help teachers implement ideas and teaching strategies. They often demonstrate lessons, co-teach, or observe and provide feedback

to teachers. Classroom supporters help teachers by enhancing their self-efficacy and belief in their own abilities (Harrison & Killion, 2007).

A learning facilitator/professional developer provides professional learning opportunities for staff members. According to Bonds and Hargreaves (2015), "The responsibility has traditional belonged to the principal; however, in recent times, administrative positions have become more complex, making leadership of a school challenging for one" (p. 57). With this approach to teacher leadership, teachers learn with and from each other to focus on what is relevant to the learning environment. The focus on classroom instruction aligns to fill in the gaps in student learning. The school becomes a community of learners and work to break down the isolation. Delegating professional development to teacher leaders possess an insider's knowledge of local school conditions, which would be unfamiliar to an outside consultant (Bond & Hargreaves, 2015).

Teacher leaders serve as mentors to new teachers. They become role models, help new teachers adjust to the school environment and provide advice about instruction and curriculum. Being a mentor takes a lot of experience but makes a large contribution to the development of new teachers (Harrison & Killion, 2007).

Teacher leaders in the role of school leaders are ones who serve on committees such as school improvement and grade level/subject area department chair. They represent their area and support school initiatives. Harrison and Killion (2007) wrote, "A school leader shares the vision of the school, aligns his or her professional goals with those of the school and district, and shares responsibility for the success of the school as a whole" (p. 76).

As a data coach, teacher leaders lead conversations that engage other teachers in analyzing and using this information to improve their instruction. They facilitate a team of

teachers to look at the results of assessments and guides them to discuss the strengths and weaknesses of the student outcomes. They plan instruction based on this information (Harrison & Killion, 2007).

Teacher leaders are always looking for a better way to help teachers and students learn. Harrison and Killion (2007) state, among the most important roles teacher leaders assume is that of learner. They model continuous improvement and demonstrate life-long learning. They use what they learn to help all students be successful. Their continuous efforts to develop more knowledge and skills make them catalysts for change. They are visionaries who do not settle for the status quo. Teacher leaders are change agents working towards school improvement.

In their study, Uribe-Florez, Al-Rawashdeh, and Morales (2014), conducted a survey asking both teachers and school administrators who took part in a program to train teachers as mathematics teacher leaders at the k-12 levels to describe the roles and responsibilities of a teacher leader. The themes constructed were teacher leaders (1) guide and facilitate a group, (2) carry out professional communications, (3) be a change agent, (4) be data driven, (5) keep students in mind, (6) have management duties, and (7) be a link between administrators and teachers.

Smylie and Denny (1990) organized a survey that asked teacher leaders to define their roles. These teacher leaders described their roles as facilitator, helper, catalyst for improvement, generator of new ideas, source of knowledge, and emotional supporter (p. 244). These teacher leaders did not see their role as administrative or evaluative. The findings also showed that the teacher leaders spent most of their time attending meetings related to the implementation of the teacher leadership program, engaging in activities related to curricular, instructional, and staff development planning, and decision making (p. 245). As one can see, expressing the roles and

responsibilities of a teacher leader is complex due to the varying structures and needs within schools or districts. The one characteristic of all these teacher leadership roles and responsibilities is to improve teaching and to enhance student learning. In summary, teacher leadership involves a form of empowerment and agency for teachers beyond the classroom.

What Teachers bring to Leadership

In their study, Uribe-Florez, Al-Rawashdeh, and Morales (2014), discovered that teacher leaders have certain characteristics or dispositions. The teacher leader characteristics constructed were teacher leaders are (1) persuasive, (2) interpersonal, (3) open minded, (4) risk takers, and (5) role models. Danielson (2007) stated, "Teacher leaders display optimism and enthusiasm, confidence, and decisiveness. They persevere and do not permit setbacks to derail an important initiative they are pursuing" (p. 16). Danielson (2007) recognized that effective teacher leaders are respectful of other's views and are respected by other teachers. They want to share their skills and learn new ones from their colleagues (Scherer, 2007). They energize others to improve teaching and learning by being a part of reshaping the culture of the school (Fullan 1994; Lambert 2003; Lieberman & Miller 2004). Donaldson (2007) stated, "Of all the adults in the school, teachers have the best opportunities to cultivate open, respectful relationships with one another." Teacher leaders build relationships by working with their colleagues on such tasks as lesson planning, mentoring, and facilitating meetings. For teacher leaders, "…working with colleagues is different from teaching students; adults are, in some ways, more demanding (Danielson, 2006, p. 133).

Teacher leaders choose to be connected to the classroom. They spend their career working with students and making learning meaningful to them. Hence, teacher leaders are in a position to carry out long range projects and initiatives in their schools or districts. "Teachers often remain

in their school district longer than both the principal and superintendent usually do and thus carry with them the institutional memory about effective and ineffective methods and programs" (Scherer, 2007, p. 7).

Teacher Leader Identity

There is still much to learn on how teachers grow to be teacher leaders and the ways in which teacher leaders are shaped by the organization leading to understand one's own professional identity (Wenner & Campbell, 2018). Wenger (1998) examined the concept of communities of practice and 'multi-membership'. Wenger discovered that people are in multiple social groups, in which, they are more fully in some and less in others. In that, all these communities of practice contribute to the construction of identity in one way or another. Wenner and Campbell (2018) research found that teacher leaders are successful in creating a professional identity of being a leader when they have the ability to be themselves within their social groups. In other words, when a teacher leader is passionate about the work they do to support their social groups, they will put forth the leadership abilities to help move the school/district forward. Thus, according to Wenner and Campbell (2018),

> [I]f we consider TL [teacher leaders] as being those who might move educational reforms or ideas forward within schools, consistency in leadership messages and actions is paramount in the change readiness of school colleagues (p. 15).

Teacher leaders must believe that they are leaders in their multi-membership groups to exhibit a professional identity of a *leader*.

Hanuscin, Cheng, and Rebello (2014) state, "Becoming a leader is not just acquiring knowledge and skills for leadership, but developing a new *professional identity*" (p. 207).

Hanuscin, Cheng, and Rebello (2014) learned that teacher leaders draw on a variety of *identity resources* to form their identity as a leader. These *identity resources* include having the opportunity to exercise agency, having multiple ways to display one's competence, access to feedback from others, and a high degree of support. Hanuscin, Cheng, and Rebello found that professional development programs that support a community of teacher leaders help them to develop their new professional identity as leaders. The next section looks at the need for teachers to lead.

The Call for Teacher Leaders: Conditions that Influence Teacher Leadership

Over the last decade educational reforms have changed the idea of instructional practices and its effectiveness on student learning. 21st century learning must prepare and empower students to enter the workforce ready to compete in the global marketplace. As the United States becomes a more diverse nation, the landscape of the education system is changing to ensure all students have equitable educational opportunities. Schools have become complex systems, requiring more support from within the organization. All these conditions command greater involvement from teacher leaders.

Educational Reforms. In the last decade, education has undergone many reforms in order to keep up with the ever changing world. Recent educational reform movements have created initiatives to improve the quality and effectiveness of teaching. They aim to introduce conformity through standardized curricula, rigorous requirements for student performance, and teacher evaluation (Smylie & Denny, 1990). The challenge for schools today is to ensure that all students are prepared with the skills and knowledge needed for the 21st century. Schools are faced with preparing students to be college and career ready by the end of high school.

Lieberman (2011) stated that schools are held accountable for meeting mandated standards of student achievement. Lieberman (2011) acknowledges,

> This generation of students need to graduate from high school with the ability to think and reason, and to be comfortable with complex cognitive demands. Students must also have a readiness to be flexible and adaptive, and enjoy a command of print as well as both visual and digital literacies (p. 16).

As the United States' composition of its population shifts, expanding opportunity and reducing barriers to education must be a national priority (Teranishi & Kim, 2017). A deeper understanding of the changes in the demographic composition of the nation will lead to greater equality in education. Immigrants and language minorities are a rapidly growing group in the United States. Today, immigration has become a predominant place in the political and policy conversations with debate over reforms to the immigrant system, border and national security, and the U.S. role in resettling refugees at a time of record global displacement (Zong & Batalova, 2017). According to U.S. News (Camera, 2016), the immigrant child population in the United States grew 51 percent from 1995 to 2014, or one-quarter of all U.S. children. Those totals are only expected to increase as families flee across the U.S. borders illegally and from an influx of refugees from countries in crisis such as in the Middle East. A deeper understanding of poverty and the barriers it presents is highly needed (Educating Students Who Lives in Poverty). Darling-Hammond (2010) states, "The United States not only has the highest poverty rates for children among industrialized nations, but it also provides fewer social supports for their well-being and fewer resources for them at school" (p. 31). These circumstances call for all educators

to work collaboratively together to ensure students have equal opportunities for high quality education.

Competing in a Global Economy. Scholars, policy-makers, and business leaders acknowledge that today's schooling in the United States must become better prepared to empower students to enter a world where they will be required to compete in a global marketplace. "The new economy is fast changing the nature of work, shrinking the demand for manual labor and expanding the demand for knowledge workers…Human capital and technology are central to this new world order, where a high school diploma is no longer a guarantee of a job or career and postsecondary education is a necessity" (Lieberman & Miller, 2004). The demands of the 21st century calls for changes in education with more focus on critical thinking, STEM (science, technology, engineering, and mathematics), collaboration, problem-solving, technology literacy, and preparing students to be citizens in our democratic nation (21st Century Skills: A Global Imperative, 2012; Berry, 2016; Darling-Hammond, 2010; U.S. Department of Education, 2017). Wherein, U.S. schools must raise student achievement rates to prepare students to be college and career ready. The U.S. Department of Education states,

> Today, about a third of American students require remedial education when they enter college, and current college attainment rates are not keeping pace with our country's projected workforce needs. Moreover, America—once the global leader in college completion—now ranks 12th in completion rates for young adults. Therefore, educators, governors, business leaders, and parents have called for reforms in education that will help students succeed in a

> world of unprecedented connectivity and complexity (College and Career Ready Standards, n.d.).

Within recent decades, a series of educational changes have emerged from this research. In 2009, President Obama provided federal funding grants called Race to the Top (RTT) to eligible states as part of the 2009 American Recovery and Reinvestment Act. The U.S. Department of Education provided RTT funds to states that adopted the Common Core State Standards, performance based evaluations for teachers and principals, high quality assessments, and implemented a statewide data system for education (Race to the Top Funds, 2016). The teacher and principal performance evaluations were based on multiple measures of educator effectiveness including student outcomes on standardized tests specifically in grades 3-8 English Language Arts and mathematics. As a result, forty-two states, the District of Columbia, four territories, and the Department of Defense Education Activity (DoDEA) have adopted the Common Core State Standards and the RTT provisions (Standards in Your State, 2018). When the Common Core State Standards were introduced, teachers needed to learn how to apply the standards to best meet the needs of their students. According to Barth (2013),

> The standards specify what students should know and be able to do, but they don't specify how teachers must teach those things. They're intentionally leaving it up to each school to put together an effective curriculum that will lead to the accomplishment of those standards (p. 11).

Educating All Students. In 1954, the United States Supreme Court's Brown v. Board of Education case declared that "separate but equal" to be unconstitutional. This U.S. Supreme Court case marked a landmark civil rights movement in the United States that helped to

illuminate the ideals of equal education for all students. To date, more than a half a century after Brown v. Board of Education, public education has yet to exist as one of racial, class, disability, and gender equality. This has been made clear from the Civil Rights Data Collection (CRDC) that the United States Department of Education released from its data findings of the 2015-2016 school year. The CRDC is a biennial collection of civil rights data from all school districts across the United States. "U.S. Secretary of Education, John B. King Jr. said that, "…despite significant work from districts across the country, the persistent disparities shown in the CRDC…highlight the need for a continued focus on educational equity", (United States Department of Education, 2016). The CRDC found significant disparities or gaps in the achievement of students of color and low socioeconomic status, and disability.

Scholars involved in educational research have known of these disparities for decades and conduct research in ways that encourage the education department and policy makers to establish a truly equitable education system. One such scholar, Darling-Hammond (2010) argues that,

> The United States needs to move much more decisively than it has in the last quarter century to establish a purposeful, equitable education *system* that will prepare *all* our children for success in a knowledge-based society. This means moving beyond a collection of disparate and shifting reform initiatives, only occasionally related to what we know about teaching and learning, to a thoughtful well-organized, and well-supported set of policies that will enable students to learn how to learn, create, and invent the new world they are entering. It also means finally making good on the unmet

> American promise that education will be made available to all on equal terms, so that every member of this society can realize a productive life and contribute to the greater welfare (pp. 2-3).

The U.S. Department of Education concluded that there exists an achievement gap between students of color, race, class, and disability. As Ladson-Billings (2006) points out, the achievement gap is one of the most common phrases in today's education literature. Ladson-Billings refers to the 2005 National Governor's Association as defining the achievement gap as a matter of race and class; and between minority and disadvantaged students and their white counterparts. The National Governor's Association recognizes that this is one of the most pressing education-policy challenges today. However, Ladson-Billings (2006) acknowledges that, "this all-out focus on the "achievement gap" moves us towards short-term solutions that are unlikely to address the long term underlying problem" (p.4). Ladson-Billings states that the underlying problem is that the achievement gap arises from an opportunity gap. Thus, thinking in terms of "achievement gap" emphasizes the symptoms, thinking about unequal opportunity highlights the causes (Carter & Welner, 2013). There are out of school factors such as health, housing, nutrition, and safety, along with formal educational opportunities that must improve significantly before we can realistically expect to see the achievement gap close (Carter & Welner, 2013). According to Ladson-Billings (2013), "These achievement disparities are a result of historical, economic, political, and moral decisions we as a society have made over time" (p. 13). Ladson-Billings realizes that the pedagogical practices of teachers contribute to either the exacerbation or the narrowing of the gap. Ladson-Billings (2013) states,

> The excellent teachers I have observed are willing to meld academic demands with compassion. They do not perseverate on

> the achievement gap but work to create an enriched, as opposed to remedial, educational environment. They understand that helping to prepare citizens is one of teaching's highest calling, and they do it without recognition and adequate reward (p 21-22).

Sharing the Responsibility. In today's era of education, scholars, administrators, and teachers realize that the principal alone cannot run an organization as complex as a school. Barth (2007) wrote,

> If there ever was a time when a principal could ride alone on a white horse, like John Wayne or Joan of Arc, and save a troubled school, those days are certainly over. The astonishing complexities and demands of the job are well known (pp. 11-12).

"Principals are also beginning to understand that one way they can get teachers invested in what they're doing is to let them sit at the table with the other grown-ups and take on a leadership role" (Barth, 2013, p. 12). In this new model of leadership, district administrators and building principals are inviting teachers to help write curriculum that expands on the basic standards to fit the needs of their students. Teacher leaders are part of designing methods of instruction to reach all students. Teacher leaders are asked to be a part of the decision-making of the school including developing master schedules, evolving the climate and culture of the school, and co-hosting faculty meetings (Barth, 2013; Berry, 2016; Biesta, Priestley, & Robinson, 2015).

All these recent educational events occurred roughly around the same time across the nation. These reforms altered local educational systems in ways they were not prepared to tackle. In March 2014, U.S. Secretary of Education Arne Duncan acknowledged that, "A lot of teachers, and principals, have said they feel off-balance getting up to speed with these new

systems" (Teach to Lead: Advancing Teacher Leadership, 2014). It was clear to Duncan that educators wanted more time, resources, and support to achieve their latest goals. Duncan also recognized that teachers wanted their voices heard about the implementation of educational reforms. Duncan stated,

> [T]he only way that higher standards, and new systems of support and evaluation, will work, is if teachers lead this change in partnership and collaboration with principals, parents and communities…teacher leadership in action, middle and high school teachers all working together owning this transition (Teach to Lead: Advancing Teacher Leadership, 2014).

States, districts, and schools are encouraged to support teachers in the development of authentic teacher leadership. According to Duncan,

> Teacher leadership means having a voice in the policies and decisions that affect your students, your daily work, and the shape of your profession. It means guiding the growth of your colleagues. It means that teaching can't be a one-size-fits-all job — that there must be different paths based on different interests, and you don't have to end up with the same job description that you started with. It means sharing in decisions that used to be only made by administrators -- and the best administrators know they'll make better decisions when they listen to teachers (Teach to Lead: Advancing Teacher Leadership, 2014).

Therefore, the opportunities for teacher leadership quickly grew during this time period. Along with the phenomena came the need to support teachers in leadership positions as written in the following section.

Funding for Teacher Leadership

In an effort to support teachers as they help to create systematic change, federal and state education departments have established funded programs that prepare teachers to lead. Along with these opportunities, districts and schools are taking a closer look at their structures to promote adult learning and collaboration to flourish teacher leadership (Harrison & Killion, 2007; Uribe-Florez, Al-Rawashdeh, and Morales, 2004; York-Barr & Duke, 2004). In 2015, the U.S. Department of Education launched a teacher leadership initiative called Improving Teacher Quality State Grant or also known as Title II, Part A. The purpose of this grant was to increase the number of highly qualified teachers and principals through professional development, develop teacher and principal leadership, and to hold schools accountable for improvements in student academic achievement (Improving Teacher Quality State Grants, 2015).

States have developed teacher leadership grant programs similar to the ones enacted by the federal education department. Starting in 2012, New York's state education department issued $83 million in funds under the Strengthening Teacher and Leader Effectiveness (STLE) grant to helped districts take a comprehensive systems approach to "prepare, recruit, develop, retain and provide equitable access to the most effective teachers and principals" as part of their implementation of the Annual Professional Performance Review (APPR) system (Strengthening Teacher and Leader Effectiveness, 2015). The program recognized effective and highly effective teachers and principals that address the emergent needs of students, teachers, and administrators to increase student achievement through established leadership roles that bear additional

responsibilities outside traditional requirements. Unfortunately, the program ended in June 2015, but during its time, it reached 221 districts, 42,000 teachers, and 1,000 principals. Both the federal and state teacher leadership programs provided funding and guidance to develop teacher leaders within school districts. Through the development of their programs, both levels learned there are structural conditions that influence teacher leadership as well.

In conclusion, scholars in the field write about expanding the notion of teacher leaders as the concept of leadership in education evolves. These scholars have learned that to successfully reshape the culture of schools, teacher leaders need to be the forefront working collaboratively with other teachers and administrators for the betterment of the students. Lieberman and Miller (2004) stated,

> At the same time that A Nation at Risk was circulating in the United States, the Carnegie Corporation released a less heralded volume that offered a different perspective. A Nation Prepared Teachers for the Twenty-First Century, argued that imposing standards and tests was not enough to transform schooling (Carnegie Corporation of New York, 1986); rather, it called for the reinvigoration of the teaching force and a reinvention of the profession. It argued that teachers should become leaders in curriculum, instruction, school redesign, and professional development and that the real power to improve achievement lay with teachers, who needed to be entrusted with new responsibility and accountability for change (p. 8)

Therefore, the future of education is envisioning a transformation of the teaching profession to include constructing a blueprint for policy-makers and administrators on fostering the leadership of teachers (Fullan, 1994).

Conceptual Framework

There is much to learn on how teachers grow to be teacher leaders and the ways in which teacher leaders transform as educators. This research sought to understand how teacher leaders made sense of their teacher leadership experiences. Thus, to answer the questions of this research, the theoretical framework of transformative learning theory was utilized to guide the development of the study. In other words, using the lens of transformative learning theory, this study explored the changes in the beliefs, values, and perspectives of teachers as they expanded their educational capacity in the role of teacher leaders.

In the sections that follow, the theory of transformative learning is understood through the recognition of adult learning as an awakening of one's consciousness, leading to new interpretations of one's beliefs, values, and perspectives. The history of transformative learning theory is examined through the work of Jack Mezirow, the originator and leading theorists of this theory. Critiques of Mezirow's theory and various interpretations of transformative learning by the leading scholars in the field are shared. Conclusively, transformative learning theory, is thus, rationalized as an appropriate theoretical framework for this particular study of teacher leadership.

Concept of Adult Learning

Cranton (2016) states that adult learning is a distinctive process that differs from childhood learning. To understand these two forms of learning, Illeris (2002, 2004, 2006), acknowledges that learning includes two integrated but very different processes: the external

interaction process between learner and the social and material environment; and the internal psychological process of elaboration and acquisition. In childhood, children are fascinated with the world around them and are engaged in continuous learning with parental and community support. Children are curious about their world, acting as sponges, absorbing as much knowledge as possible. However, adult learning is vastly opposite of childhood learning. Illeris (2006) states,

> Important to maintain that in contrast to children's uncensored and confident learning, adults' learning is basically selective and self-directed, or to put it in more concrete terms:
>
> - Adults learn what they want to learn and what is meaningful for them to learn;
> - Adults draw on the resources they already have in their learning;
> - Adults take as much responsibility for their learning as they want to take (if they are allowed to); and
> - Adults are not very inclined to learn something they are not interested in, or in which they cannot see the meaning or importance. At any rate, typically, they only learn it partially, in a distorted way or with a lack of motivation that makes what is learned extremely vulnerable to oblivion and difficult to apply in situations not subjectively related to the learning context (p. 17).

Therefore, adult learning is referred to andragogy, where in, traditional school-based education for children is a pedagogy (Knowles, 1980). Adult learning is considered, in most cases, a voluntary event lead by self-motivation and self-direction. "Individuals choose to become involved in either informal or formal learning activities because they want to develop personally or as a response to a professional or practical need" (Cranton, 2016, p. 2).

According to Mezirow (1991),

> As adult learners, we are caught in our own histories. However good we are at making sense of our experiences, we all have to start with what we have been given and operated within horizons set by ways of seeing and understanding that we have acquired through prior learning (p. 1).

Our prior knowledge has been acquired during our childhood through both socialization and schooling. We are shaped by our language, culture, and experiences which limit our future or adult learning (Mezirow, 1991). Thus, adult learning must be based on fundamentally different premises than childhood learning. "The basic requirement is that the adult must take, and must be allowed to take, responsibility for his or her own learning. It is decisive that education programs and teaching practice respects, supports and even demands this" (Illeris, 2006, p. 22). As for this study, it is concerned with the theoretical approach of transformative learning theory and its association with adult learning.

Defining Transformative Learning Theory

Transformative learning is the process of changing one's perspective through understanding of the self, one's belief systems, and behaviors. Transformative learning is learning that changes one's meaning perspectives or basic ways of looking at the world

(Mezirow, 1991). Transformative learning is "a deep, structural shift in basic premises of thought, feeling, and action" (The Transformative Learning Centre, 2016). Christie, Carey, Robertson, and Grainger (2015) wrote,

> The aim of transformative learning is to help individuals challenge the current assumptions on which they act and, if they find them wanting, to change them. This includes a mental shift as well as a behavioural one. The hope of transformative learning is that better individuals will build a better world (pp.10-11).

Transformative learning is making meaning of our experiences and to make meaning of our interpretations rather than acting on purposes, beliefs, judgments, and feelings of others (Kerka, 2005). As adults participate in transformative learning, they activate their critical consciousness. Critical consciousness, according to Freire (2013) is learning that perceives social, political, and economic contradictions that intervenes in reality in order to change it. Elias (1997) states,

> Transformative learning is the expansion of consciousness through the transformation of basic worldview and specific capacities of the self; transformative learning is facilitated through consciously directed processes such as appreciatively accessing and receiving the symbolic contents of the unconscious and critically analyzing underlying premises (p. 1).

The proceeding section, explores the early development of transformative learning theory through the research conducted by Jack Mezirow, the originator and leading theorist of this theory.

Jack Mezirow: Leading Transformative Learning Theorist

Jack Mezirow is the creator and the leading theorists of transformative learning theory. Mezirow (1991) explained that, "Transformation theory does not derive from a systematic extension of an existing intellectual theory or tradition" (p. xiv); rather, "it is an integration of his earlier research and concepts and theories from a wide array of disciplines" (Taylor & Cranton, 2012). Mezirow's approach to transformative learning theory has insurgence of constructivism, humanism, and critical social theory (Mezirow, 1991, p. xiii). Constructivist assumptions underlie Mezirow's (1991) theory as he wrote, "conviction that meaning exists within ourselves rather than in external forms such as books and that personal meanings that we attribute to our experiences are acquired and validated through human interactions and experiences" (p. xiv). Mezirow's approach follows the work of constructivist such as Jean Piaget, Noam Chomsky, and Lawrence Kohlberg. Humanist assumptions are inherent in transformative learning theory. Humanists principles stress the importance of individual and specific human needs, agency, notions of freedom, and autonomy (Taylor & Cranton, 2012). According to Taylor and Cranton (2012), "If we could not make these assumptions that people can make choices, have the potential for growth and development, and define their own reality, transformative learning could not be described as it is described" (p. 6). Abraham Maslow and Carl Rogers had a strong influence on Mezirow's conceptualization of transformative learning. Critical social theory assumptions also underlie Mezirow's theory. Critical social theory is to critique and change society. "The dominant ideology in a society includes the beliefs, assumptions, and perspectives that people use to make sense of their experiences" (Taylor & Cranton, 2012). Taylor and Cranton (2012) acknowledge,

> At the center of transformative learning theory is the notion that we uncritically assimilate our values, beliefs, and assumptions from our family, community, and culture. In other words, we adopt the dominant ideology as the normal and natural way to think and act. When we are able to recognize that these beliefs are oppressive and not in our best interests, we can enter into a transformative learning process (p. 7).

Mezirow has taken the ideas of critical social theory from the works of Paulo Freire and Jürgen Habermas as an influence for his conceptualization of transformative learning theory. However, Mezirow (1991) expressed about the ideas of Habermas,

> I do not write from the perspective of the Frankfurt School with which he is associated, nor have I attempted to interpret systematically what Habermas or any other single theorist has to say about adult learning. I have adopted some of Habermas' ideas, such as his distinction between instrumental and communicative learning and his description of the ideal conditions for rational discourse, but I have freely changed others; for example, I have extended the process of emancipatory learning to include the instrumental learning domain" (pp. xiv-xv).

Thus, Mezirow describes transformative learning theory as "not so much what happens to people but how they interpret and explain what happens to them that determines their actions, their hopes, their contentment and emotional well-being, and their performance" (Mezirow, 1991, p. xiii).

Influences for Mezirow's Transformative Learning Theory

Mezirow attributes developing the theory of transformative learning, particularly the idea of perspective transformation to events that occurred in his life. Mezirow experienced a crisis or a "disorienting dilemma" that he encountered in his career that altered his way of seeing the work he did related to social action (Mezirow, 1991). Another key event in the development of Mezirow's transformative learning theory was the return to college for Mezirow's wife. This event was a "dramatically transformative experience, which led to a new career and life-style" (p. xvii) for Edee, Mezirow's wife. This event lead to Mezirow's research on women returning to college after some time away. These events are elaborated in the next two sub-sections.

Adult Education for Social Action. Mezirow spent much of his professional career as an adult educator "engaged in fostering democratic social action through community development and adult literacy programs in the United States and abroad" (Mezirow, 1991, p. xvi). In the early 1970s, Mezirow encountered the work of Paulo Freire, which he stated,

> [U]nequivocally challenged the validity of my relatively unsophisticated premises concerning adult education for social action and consequently the validity of the roles I had played in programs designed to foster the kind of learning. The critical dimension missing from my work had been my lack of awareness both of the centrality of conscientization in the learning process and of the importance of entrenched power in the community development process I had attempted to foster. This realization precipitated an absorbing process of transformative learning-

> learning that changed my meaning perspectives or basic ways of looking at the world (Mezirow, 1991, pp. xvi-xvii).

Thus, much of the transformative learning theory originated in the ideas of Paulo Freire. Paulo Freire was an educational reformist from Brazil who portrayed a theoretical approach to emancipation through education (Kerka, 2005). Freire's *Pedagogy of the Oppressed* (2005*),* which was first published in English in 1970, is thought of primarily in terms of its contribution to education of illiterate adults in the Third World, in which, through education, one would become critical conscious as to overpower the oppressors. Freire's work highlights the oppression, hence, the institutional privilege and power certain groups called the oppressors, benefit from through the expense of the oppressed. However, in our nation, Freire's works have taken on a somewhat different meaning for educators as his works relate to the social constructs within the United States, as expressed,

> Freire's books have since taken on a considerable relevance for educators in our own technologically advanced society, which to our detriment acts to program the individual-especially the disadvantaged-to rigid conformity (Freire, 2005, Forward).

Freire's work provides us with the, "critical tools to reflect on, and understand, the process through which we come to know what it means to be at the periphery of the intimate yet fragile relationship between the colonizer and the colonized" (Freire, 2005, p. 11), thus in our nation, Freire's work brings meaning to the relationships between social classes of economic, gender, and race.

Freire provides an educational theory with its framework on radical social change with his central concept as "conscientization". "Consciousness is very much the product of

perception and orientation in the *external* world" (Cranton, 2016, p. 110). Freire identified four levels of consciousness: intransitive consciousness, semi-intransitivity consciousness, naïve consciousness, and critical consciousness. Intransitive consciousness is the lowest level of consciousness. According to Mezirow (1991), at this level of consciousness "people are preoccupied with meeting elementary needs and are unaware of problems other than basic biological ones. People at this level lack historical consciousness and are unable to comprehend their sociocultural situation" (p. 136). At the semi-intransitivity consciousness level, "Life is perceived in terms of fate or destiny and seen as beyond human control. The oppressed internalize the valves of their oppressors, resulting in emotional dependency upon them and self-deprecation" (Mezirow, 1991, p. 136). At the naïve consciousness level, "people engage in questioning their lives and can understand that sociocultural reality is determined by human beings. However, questioning is naïve. People…are easily impressed by populist leaders and are very vulnerable to manipulation" (Mezirow, 1991, p. 136). As stated, Freire was concerned with a social transformation or an unveiling of reality by the oppressed through the awakening of their critical consciousness. The highest level of consciousness is critical consciousness or *conscientização* (Portuguese) which develops when one intervenes in the world as a transformer of that world (Freire, 2005). Critical consciousness represents "things and facts as they exist empirically, in their causal and circumstantial correlations" (Freire, 2013, p. 41). It is the process by which individuals apply critical thinking to analyze their current situations, develop a deeper understanding of their reality, and to develop solutions to their problems. According to Freire (2005, 2013) critical consciousness happens through dialogue with people in their community and through participatory action. Dialogue encompasses respect for those involved and builds social capital leading people to a more justice and humane world.

However, Freire (2005) saw that dialogue must also lead to praxis. Freire (2005) states, that it is not enough for people to come together in dialogue in order to gain knowledge of their social reality. They must act together upon their environment in order to critically reflect upon their reality and to transform it through action and critical reflection (Freire Institute, 2018). Freire (2005) explained,

> Let me emphasize that my defense of the praxis implies no dichotomy by which this praxis could be divided into a prior stage of reflection and a subsequent stage of action. Action and reflection occur simultaneously. A critical analysis of reality may, however, reveal that a particular form of action is impossible or inappropriate *at the present time.* Those who through reflection perceive the infeasibility or inappropriateness of one or another form of action (which should accordingly be postponed or substituted) cannot thereby be accused of inaction. Critical reflection is also action (pp. 136-137).

Therefore, through praxis, "the union of reflection and action, learners engage in action to bring about social change" (Mezirow, 1991, p. 136). Thus, Mezirow (1991) learned that through conscientization of learning and education, learners can achieve a deepening awareness of both the sociocultural reality which shapes their lives and of their capacity to transform that reality through action.

Mezirow's Early Development of Transformative Learning Theory

Mezirow was enlightened by his wife's experience of returning back to college after taking some time off. He was captivated by her learning transformation. Mezirow's wife's

experience influenced his decision to conduct a national study of women returning to college and the workforce after several years away (Mezirow, 1991). Mezirow (1978a) conducted a qualitative study to "identify factors that characteristically impede or facilitate" (p. 6) women's progress in the re-entry programs of two and four year colleges. In the 1975 study, Mezirow (1978a, 1978b) investigated 12 re-entry college programs with 83 women. The 12 programs represented a diverse population from New York/New Jersey (five programs), San Francisco (five programs), and Washington state (two programs) (Kitchenham, 2008). In a follow up to the study, Mezirow conducted a nationwide telephone survey of 24 on-site programs in 11 states (Kitchenham, 2008). In addition, Mezirow sent a mail enquiry to 1,172 two year colleges, of which 314 sponsored re-entry programs for women (Mezirow, 1978a). Mezirow's (1978a, 1978b) findings concluded that the respondents had undergone "personal transformation" and identified 10 phases that they could experience *(*see *Figure 2.4)*. Based on this work of adult learning, Mezirow (1978a) outlined "a theory of adult development and a derivative concept of adult education" (p. 153). Mezirow's theory included the concepts of informational, instrumental, communicative, and self-reflective learning. These forms of learning are examined in the next sections.

Informational Learning and Transformational Learning

Kegan (2000), in his article, tells a story about a ten-year old boy who decided to read the entire encyclopedia, A through Z, for a summer project. He was the talk of his neighborhood as he recalled facts about all things A through Z. The boy dramatically increased his fund of content familiarities and his recall knowledge was impressive. However, his learning was not transformative in nature. But rather, the ten-year old boy was engaged in informational learning. According to Kegan (2000),

> Learning aimed at increasing our fund of knowledge, at increasing our repertoire of skills, at extending already established cognitive capacities into new terrain serves the absolutely crucial purpose of deepening the resources available to an existing frame of reference. Such learning is literally in-*form*-ative because it seeks to bring valuable new contents into the existing form of our way of knowing… Changes in one's fund of knowledge, one's confidence as a learner, one's self-perception as a learner, one's motives in learning, one's self-esteem-these are all potentially important kinds of changes…But it is possible for any or all of these changes to take place without any transformation because they could all occur within the existing form or frame of reference (pp. 49-51).

However, learning aimed to change not only *what* we know but change *how* we know comes closer to the etymological meaning of *education* (Kegan, 2000). "Trans-*form*-ative learning puts the form itself at risk of change (and not just change but increased capacity)" (p. 49). Both forms of learning are valuable, "…one within a pre-existing frame of mind and the other reconstructing the very frame" (Kegan, 2000, p. 49).

Instrumental, Communicative, and Self-Reflective Learning

Mezirow's theory is based on three kinds of learning: instrumental, communicative (dialogic), and self-reflective (emancipatory) learning. Instrumental learning focuses on learning through task oriented problem solving and the determination of cause and effect relationships. Communicative learning involves understanding the meaning of what others "communicate concerning values, ideals, feelings, and moral decisions" (Mezirow, 1991, p. 8). Self-reflection

is understanding why the learner is learning the information, what are the learner's present conditions, and ways of taking action for social and individual change (Kitchenham A. , 2008). During these three types of learning, adults make meaning of task oriented problem solving and communication through meaning structures.

Kerka (2005) explains that Mezirow describes meaning structures as an, "…act as culturally defined frames of reference that are inclusive of meaning schemes and meaning perspectives" (p. 6). Meaning structures (perspectives and schemes) are major components of this theory. Mezirow (1991) defines meaning perspectives as broad sets of predispositions resulting from psycho-cultural assumptions which regulate the spheres of our expectations. It is through socialization, acculturation, and significant life experiences we develop our meaning perspectives. Kerka (2005) states that "over time, in conjunction with numerous congruent experiences, these perspectives become more ingrained into our psyche and changing them is less frequent" (p. 6). These perspectives constrain us and make our view of the world subjective. These perspectives are like "a double-edged sword whereby they give meaning (validation) to our experiences, but at the same time skew our reality" (Kerka, 2005, p. 7). The next sub-section details Mezirow's frame of reference understanding.

Mezirow's Frame of Reference Interpretation. Mezirow refers to frame of reference (as described in *Figure 2.2*) as the structures of culture and language in which we construe meaning by our lived experiences. "They [frame of reference] selectively shape and delimit our perception, cognition and feelings by predisposing our intentions, beliefs, expectations and purposes [our preconceptions]" (Mezirow, 2006, p. 26). Mezirow (2006) further explains that, "…we have a strong tendency to reject ideas that fail to fit our preconceptions" (p. 26).

Kegan (2000) acknowledges, that Mezirow's term of *frame of reference* is "necessarily epistemological" (p. 52), in that, one's frame of reference undergoes a change. Kegan (2000) expressed,

> Our frame of reference may be passionately clung to or casually held, so it clearly has an emotional or affective coloring. Our frame of reference may be an expression of our familial loyalties or tribal identifications, so it clearly has a social or interpersonal coloring. Our frame of reference may have an implicit or explicit ethical dimension, so it clearly has a moral coloring. But what is the phenomenon itself that takes on all these colorings? Mezirow, in this volume says a *frame of reference* involves both a *habit of mind* and a *point of view*. Both of these suggest that, at its root, a frame of reference is a way of knowing (p. 52).

Therefore, epistemology refers to, according to Kegan (2000), "…precisely this: not what we know but our way of knowing" (p. 52). "We do not only form meaning, and we do not only change our meanings; we change the very form by which we are making our meanings. We change our epistemologies" (Kegan, 2000, p. 53).

Habits of mind, as Mezirow describes, are a way of seeing the world based on our background, experiences, culture, and personality (Mezirow, 1997). Mezirow's idea of habits of mind or meaning perspectives (as described in *Figure 2.2*) are epistemic, sociolinguistic, psychological, ethical, philosophical, and aesthetic. "Because all of our habits of mind are determined by our personal stories, it is reasonable to expect that they are interrelated" (Cranton, 2016, p. 19). Habits of mind, thus, are expressed in a particular *point of view*, "the constellation

of belief, value judgment, attitude, and feeling that shapes a particular interpretation" (Mezirow, 1997, p. 6). Mezirow's description of frames of reference that involve habits of mind and point of view is illustrated in *Figure 2.2*. Thus, Mezirow (2006) defines transformative learning as,

> [T]he processes by which we transform problematic frames of reference (mindsets, habits of mind, meaning perspectives)-sets of assumption and expectation-to make inclusive, discriminating, open, reflective and emotionally able to change. Such frames are better because they are more likely to generate beliefs and opinions that will prove more true or justified to guide action (p. 26).

Critical Reflection. The transformation of one's meaning structures (schemes and perspectives) are understood and developed through critical reflection. During reflection, adults revise their meaning perspectives. Kerka (2005) explains,

> Meaning perspectives operate as perceptual filters that organized the meaning of our experiences. When we come upon a new experience, our meaning perspectives act as a sieve through which each new experience is interpreted and given meaning. As the new experience is assimilated into these structures it either reinforces the perspective or gradually stretches its boundaries, depending on the degree of congruency. However, when a radically different and incongruent experience cannot be assimilated into the meaning perspective, it is either rejected or the meaning perspective is transformed to accommodate the new experience. A transformed meaning perspective is the development of a new meaning structure. This

> development is usually the result of a disorienting dilemma due to a disparate experience in conjunction with a critical reappraisal of previous assumptions and presuppositions. It is this change in our meaning perspective that is at the heart of Mezirow's theory of perspective transformation-a world view shift (p.7).

"In adult education generally, reflective thinking is a goal of learning" (Cranton, 2016, p. 25). Dewey (1933) defined reflection as "active, persistent and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it and the further conclusion to which it tends" (p. 9). "Grounds" refers to evidence by which the reliability and worth of a belief can be established so as to justify its acceptance" (Mezirow, 1991, pp. 100-101). According to Mezirow (1991), "Through reflection, we *see through* the habitual way that we have interpreted the experience of everyday life in order to reassess rationally implicit claim of validity made by a previously unquestioned meaning scheme or perspective" (p. 102).

Mezirow asserts that critical reflection involves three types of reflection-content, process, and premise(s). *Figure 2.3* provides an illustration of these types of reflections. Reflection is similar to problem solving as Mezirow (1991) states how we "reflect on the content of the problem, the process of the problem solving, or the premise of the problem" (p. 105). Mezirow (1991) explains that "We may reflect on the content or description of the problem (or a problematic meaning scheme), the process or method of our problem solving, or the premise(s) upon which the problem is predicated" (p. 117). Mezirow further explains,

> Through content and process reflection we can change (elaborate, create, negate, confirm, problematize, transform) our meaning schemes; through premise reflection we can transform our meaning

> perspectives. "Transformative learning" pertains to both the transformation of meaning schemes through content and process reflection and the transformation of meaning perspectives through premise reflection" (p. 117).

In other words, adults experience transformative learning when they engage in deeper levels of reflection. Through reflection we are able to understand ourselves more, our learning better, and improve our competence.

Critical Discourse. Mezirow emphasizes in his writings, the importance of critical discourse to transformative learning (Cranton, 2016). Mezirow defines critical discourse as dialogue involving the assessment of beliefs, feelings, and values (Mezirow, 2003b). Mezirow (1991) states that participants in critical discourse will:

- Have accurate and complete information
- Be free from coercion and distorting self-perception
- Be able to weigh evidence and access arguments objectively
- Be open to alternative perspectives
- Be able to reflect critically on presuppositions and their consequences
- Have equal opportunity to participate
- Be able to accept an informed, objective consensus as valid (pp. 77-78)

It is through critical discourse that, "the validity of a speech act is called into question that the learner has the opportunity to make a new interpretation of his or her experience, which in turn can transform meaning schemes and perspectives" (Mezirow, 1991, p. 71).

Mezirow's Perspective Transformation

Mezirow's examination of adult learning-instrumental, communicative, and self-reflection, led to his description of perspective transformation (Kitchenham, 2008). Mezirow describes perspective transformation as,

> The emancipatory process of becoming critically aware of how and why the structure of psycho-cultural assumptions has come to constrain the way we see ourselves and our relationships, reconstituting the structure to permit a more inclusive and discriminating integration of experience and acting upon these new understandings (Kitchenham, 2008, p. 109).

The perspective transformation (illustrated in *Figure 2.2*) suggests that a person can go through a transformation or change of their world view through a number of adult learning phases (illustrated in *Figure 2.4*). According to Mezirow (1991),

> Perspective transformation involves a sequence of learning activities that begins with a disorienting dilemma and concludes with a changed self-concept that enables a reintegration into one's life context on the basis of conditions dictated by a new perspective. The sequence of transformative learning activities is not made up of invariable developmental steps; rather, the activities should be understood as sequential moments of "meaning becoming clarified" (p. 193).

Mezirow (1991) uncovered these transformative phases during his national study in the 1970s of women returning to college and the work force. A description of Mezirow's ten phases

of transformative learning is demonstrated in *Figure 2.4*. Mezirow discovered that a transformation of learning occurs when a person is faced with a "disorienting dilemma". Disorienting dilemmas are experiences that do not fit into a person's current beliefs or interpretations of the world. Disorienting dilemmas forces a person to reconsider his/her/their beliefs. This happens through critical reflection of your assumptions to determine whether the beliefs, often acquired through cultural assimilation as a child, remain functional as you face a new understanding of the world (Mezirow, 1991). Through his research, Mezirow (1991) learned that one exhibits rational discourse as a phases of movement through a transformation that include:

- Seeking assistance from a wider variety of sources of knowledge
- Taking a more critical stance
- Looking at helpers as resources for finding answers rather than as authorities who will provide the answers
- Testing boundaries and assumptions
- Actively looking for patterns of behavior and avoidance in one-self
- Greater awareness of emotions, physical states, intuition, and dream symbolism
- Searching for forms of assistance compatible with one's learning style (p. 194)

Through discourse, one recognizes discontent and that others have also negotiated the need for similar change. This leads to exploration of new roles, relationships, and action planning. Acquisition of knowledge and skills is important to build competence and confidence in new roles and relationships. The final phase is a reintegration into one's life based on the new meanings, knowledge, and skills acquired.

Mezirow (1991) examined other researchers' studies on transformative learning (Hunter, 1980; and Morgan, 1987; Williams, 1986), in which, these researchers attest to the difficulties that perspective transformations involve for the learner and the typically difficult negotiation, compromise, stalling, backsliding, self-deception, and failure that one observes in transformative learning (p. 171). Mezirow identified two points when such behavior was common,

> One is at the beginning, when the learner is exposing to critical analysis his or her established ideas, values, and sense of order, as well as the feelings that he or she has about these assumptions. The other is the point at which a commitment to reflective action logically should follow insight but is so threatening or demanding that the learner is immobilized. This is the point in the transformative learning process at which the conative plays a specific role. It is not enough to understand intellectually the need to change the way one acts; one requires emotional strength and an act of will in order to move forward (p. 171).

A learner may experience backsliding in the process of transformation as the learner acquires an insight that results in a transformation in meaning scheme that may contribute over time toward a change in meaning perspective but at the moment comes into conflict with the established meaning perspective, is overwhelmed by it, and unable to act upon it (Mezirow, 1991). Thus, conflict between meaning scheme and perspective can result in self-deception and may even impede the progress in perspective transformation. Hence, the transformative learning process is one of renewed sense of agency and self-identification.

Transformative learning results in a paradigm shift or perspective transformation acquired from learning and a change in one's frames of reference. Individuals experience transformation learning when they are active members in their own learning about themselves and the world around them (Mezirow, 1991). Thus, transformative learning increases one's sense of agency (Kligyte, 2011; Mezirow, 1991). Sense of agency occurs in the fifth and sixth phase of Mezirow's ten phases of transformative learning (*see Figure 2.4*). Sense of agency refers to the feelings of control we have over our actions. According to Napper and Rao (2019),

> Agency is what allows you to pause, evaluate, and act when you face a challenge-be it at work, home, or anywhere else in the world…Agency is about being *active* rather than *passive*, of reacting effectively to immediate situations and planning effectively for your future (p. 6).

Therefore, building agency is central to helping people improve their lives (Napper & Rao, 2019).

Transformation learning leads to the re-imaging of one's identity. Identity re-imaging occurs in the eighth phase of Mezirow's ten phases of transformative learning (*see Figure 2.4*). Identity is the negotiation of self-views, other's perceptions or expectations, and the meaning of one's role or position within society (Priest & Seemiller, 2018; Gee, 2000). According to Priest and Seemiller (2018), "Professional identities are socially constructed, and legitimized through interactions and participation with students, colleagues, and professional communities" (p. 94). Identity is constructed through reflection and meaning making processes. We commit to our identity, that is, we believe or want to believe characteristics about ourselves or the ways that we wish to be perceived by others (Ferguson, Phillips, Rowley, & Friedlander, 2015).

Transformation learning increases an individual's confidence. Increased confidence occurs in the ninth phase of Mezirow's ten phases of transformative learning (*see Figure 2.4*). Confidence is built in new ways as individuals learn new concepts and skills expanding on their existing abilities and creating new competencies. When an individual's confidence increases, one is more willing to step out of their comfort zone to take risks personally and professionally. In conclusion, Mezirow's theory of transformative learning influences adult education practices, as the learner critically thinks on their current competency, discovers new assumptions, and through dialogue and reflection, puts this new way of performing the competency into action.

While Mezirow proposes ten phases of transformative learning, he notes that the phases do not have to occur in a sequential fashion for transformation to happen (Mezirow, 1991). Mezirow wrote,

> [T]ransformation theory is not a stage theory, but it emphasizes the importance of the movement towards reflectivity in adulthood as a function of intentionality and sees it advanced through increased ability and experience, which may be significantly influenced by educational interventions. Transformative learning involves an enhanced level of awareness of the context of one's beliefs and feelings, a critique of their assumptions and particularly premises, an assessment of alternative perspective, a decision to negate an old perspective in favor of a new one or to make a synthesis of old and new, an ability to take action based upon the new perspective, and a desire to fit the perspective into the broader context of one's life (Mezirow, 1991, p. 161).

While the process may not be linear, Mezirow (1991) emphasizes critical reflection, role taking, dialogue, and action remains persistent in a transformation of how we perceive the world leading to a new understanding.

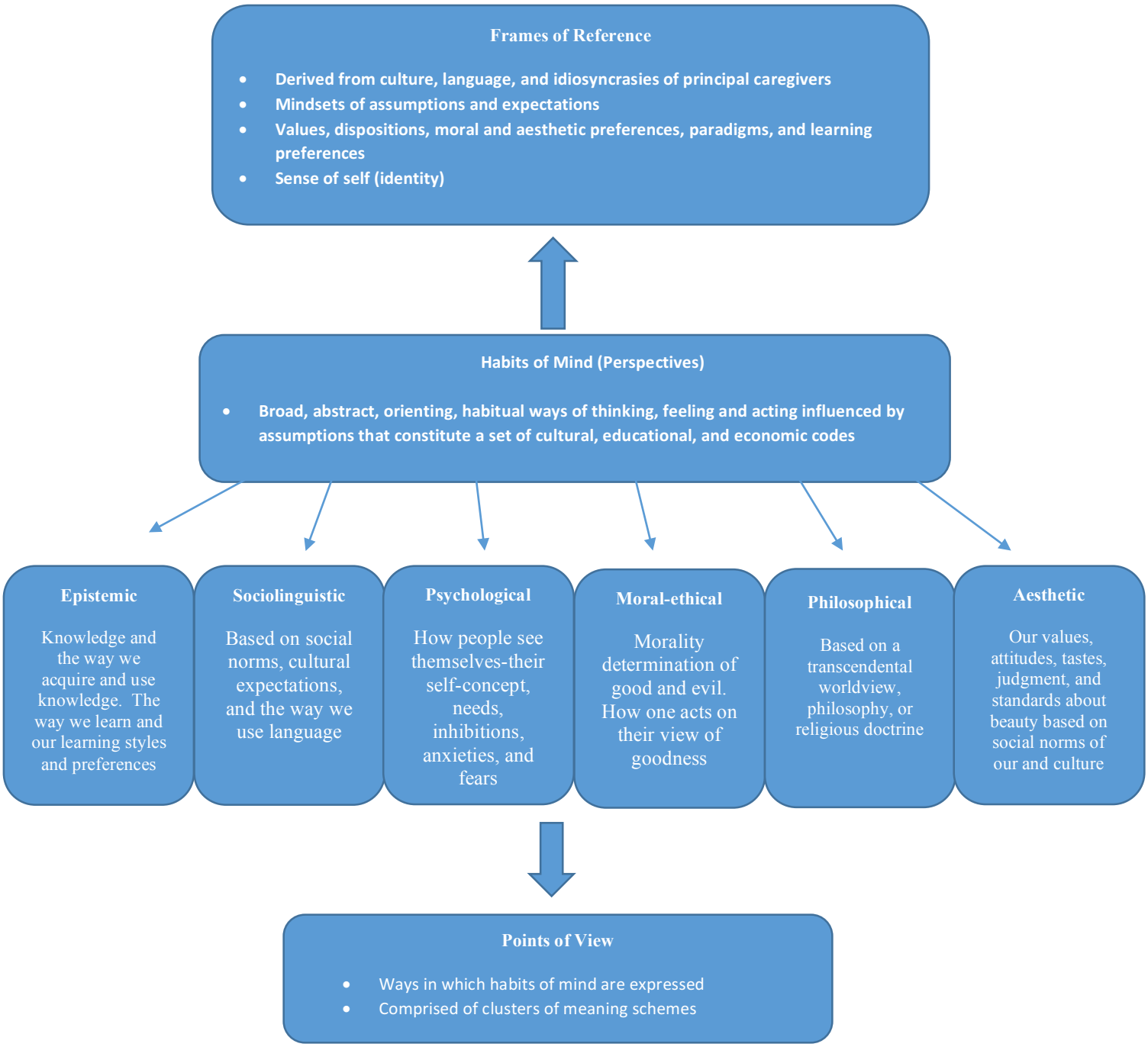

Figure 2.2 Mezirow's Perspective Transformation (Mezirow, 1991)

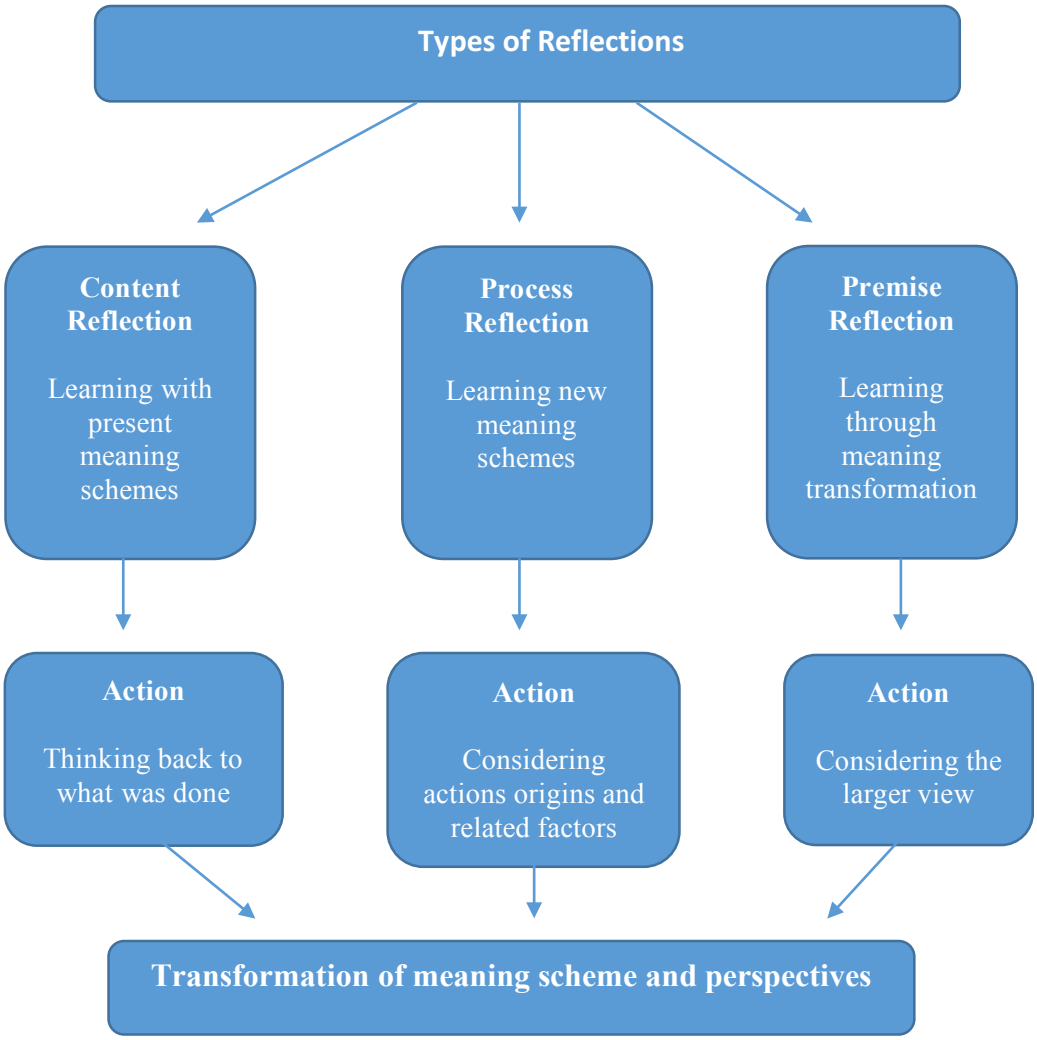

Figure 2.3 Mezirow's Type of Reflections (1991)

"Through reflection, we see through the habitual way that we have interpreted the experience of everyday life in order to reassess rationally implicit claim of validity made by a previously unquestioned meaning scheme or perspective" (Mezirow, 1991, p. 102).

Phase 1	Disorienting dilemma is experiences that do not fit into a person's current beliefs about the world
Phase 2	Self-examination of the world with feelings of guilt and shame
Phase 3	A critical assessment of epistemic, sociocultural, or psychic assumptions
Phase 4	Recognition of a connection between one's discontent and the process of transformation
Phase 5	Exploration of options for new roles, relationships, and actions [sense of agency]
Phase 6	Planning a course of action [sense of agency]
Phase 7	Acquisition of knowledge and skills for implementing one's plan [sense of agency]
Phase 8	Provisional trying of new roles [identity]
Phase 9	Building of competence and self-confidence in new roles and relationships
Phase 10	A reintegration into one's life on the basis of conditions dictated by one's new perspective

Figure 2.4 Mezirow's Ten Phases for Transformative Learning

Mezirow conducted a qualitative study, interviewing 83 women who re-entered community college programs and the work force in the 1970s. From his data findings, Mezirow (1978a,1978b, 1991) identified 10 phases of transformational learning. According to Mezirow (1991), "Perspective transformation involves a sequence of learning activities that begins with a disorienting dilemma and concludes with a changed self-concept that enables a reintegration into one's life context on the basis of conditions dictated by a new perspective. The sequence of transformative learning activities is not made up of invariable developmental steps; rather, the activities should be understood as sequential moments of "meaning becoming clarified" (p. 193).

Critical Responses to Mezirow's Theory

A number of critical responses to Mezirow's transformative learning theory have developed over the years. One area of contention is Mezirow's emphasis on rationality. Researchers (Boyd & Myers, 1988; Clark & Wilson, 1991; Cranton, 2006; Dirkx, 2001; Taylor, 1997) concluded that Mezirow's transformative learning theory had an over reliance on rationality and has led to other studies that have shown the essentiality of "other ways of knowing" that include intuitive, creative, spiritual, and emotional processes of learning. Another area of contention of Mezirow's theory is the practice of transformative learning with little support from empirical research. Adult educators are being encouraged to practice the approach of perspective transformation, however, these educators are not prepared to deal with the associated consequences in the classroom such as the emotions of reassessing one's self-concept as a learner (Taylor, 1997). Lastly, few studies of Mezirow's transformative learning theory explore learning in relationship to the participants' cultural background (Collard & Law, 1989; Taylor, 1997). Taylor (1997) stated,

> They [studies utilizing Mezirow's transformative learning theory] offered a universal process to fostering transformative learning that discounts difference based on race, class, gender, sexual orientation, and ethnicity and failed to recognize the impact of the positionality of marginalized groups in the classroom experience. Transformative learning, as we presently know it, relies on privileged view of teaching that assumes a safe learning environment is relevant and available to all learners (p. 55).

Thus, Mezirow's theory focuses on the individual transformation rather than on social transformation-on challenging power relations based on gender, race, class, sexual orientation, dis/ability, or religion (Taylor & Cranton, 2012). In the next section, alternative perspectives of transformative learning are considered.

Alternative Perspectives of Transformative Learning Theory

As researchers study this phenomena, new thoughts and understanding of transformative learning continue to emerge. Kucukaydin and Cranton (2012) stated, "Following the publication of Mezirow (1991) comprehensive description of the theory, scholars critiqued and elaborated on the theory, leading to theoretical development in a variety of directions" (p. 44). According to Taylor (2008),

> At present, it can be argued that there are a variety of alternative conceptions of transformative learning theory that refer to similar ideas and address factors often overlooked in the dominant theory of transformative (Mezirow's), such as the role of spirituality, positionality, emancipatory learning, and neurobiology. The exciting part of this diversity of theoretical perspectives is that it has the potential to offer a more diverse interpretation of transformative learning and have significant implications for practice (p. 7).

Psychoanalytic View of Transformative Learning. A psychoanalytic (unconscious mind) view of transformative learning is seen as a process of individuation (Taylor, 2008). Scholars have introduced this extra-rational approach as a missing element in the theory. Individuation is a life-long inner journey of oneself and a process

of coming to understand through reflection of psychic structures such as ego, persona, and collective unconscious that makes up one's identity. According to Boyd and Meyers (1988), Cranton (2000), and Dirkx (2000, 2012), individuation involves discovery of new talents, a sense of empowerment, and confidence, a deeper understanding of one's inner self, and a greater sense of self-responsibility. Boyd (cited in Kerka 2005) defines transformation as "a fundamental change in one's personality involving conjointly the resolution of a personal dilemma and the expansion of consciousness [an awakening of the unconscious mind] resulting in greater personality integration" (p. 13). Kucukaydin and Cranton (2012) write,

> Scholars working from this perspective suggest an inherently emotional and imaginal process, grounded in the premises and assumptions of a Jungian psychoanalytical framework. They see individuation as a form of transformation learning based in part on dialogue between the conscious and the unconscious, a dialogue among the anima-animus, shadow, and archetypes, using images and symbols (p 47).

This unconscious and conscious dialogue helps to better understand one's identity. As Mezirow focuses on cognitive conflicts experienced by one's relationship with culture, this view focuses on conflicts within the individual's psyche and the resolution among these entities that leads to a transformation (Kerka, 2005).

Spirituality View of Transformative Learning. Distinctive from the other perspectives of transformative learning, O'Sullivan (1999) views transformative learning as a process that embodies the spiritual, emotional and social justice needs of adult learners. O'Sullivan argues

that educators must understand where their society is headed. He acknowledges that the 20th century was a century of the economy and that the main purpose of education was to equip students to learn how to compete in the global market place. As for the 21st century, O'Sullivan sees the role of an educator to inform learners of what is wrong with the modern era and to help learners create a vision of new possibilities that are humane, environmentally conscious and socially just. This vision includes transforming the human spirit, not by institutional religions, but rather, through transformative learning.

O'Sullivan (1999) defines spirituality as, "the deeper resources of the human spirit and involves the non-physical, immaterial dimensions of our being; the energies, essences and part of us that existed before and will exist after the disintegration of the body" (pp. 259-260). O'Sullivan (1999) refers to globalization as warping the human spirit by its "egregious emphasis on material goods" (p. 260). He further states that globalization is "pervasive and appears to move at the speed of an aggressive cancer" and "is most certainly a cancer of the human spirit" (p. 260). If in our near future, a one world globalized economy existed, it would foreclose on the human spirit. O'Sullivan asserts the limits of our contemporary consumer culture in meeting our deepest spiritual needs.

O'Sullivan sees transformative learning as a process to understanding the importance for diversity, subjectivity, and communion. Through this understanding, the spirit will be nourished and the soul ignited. O'Sullivan (1991) writes,

> Diversity is one of the necessary ingredients of a healthy spirituality, yet it only touches the surface if we do not take into consideration the depth dimension of spirituality that is identified with the principal of subjectivity…subjectivity represents that

> dimension of deep interiority that one identifies with the notion of the soul…When we see things in their diversity we must also go below the surface of differences to appreciate the deep interiority of all creation. Our subjectivity interiority does not develop in a vacuum. We know very clearly that the soul is nourished in community (p. 260-261).

Emancipatory View of Transformative Learning. While the other views of transformative learning focus on the individual, emancipatory learning, specifically, focuses on social transformation. According to Imel (1999), "The goal of emancipatory learning is to free learners from the forces that limit their options and control over their lives and to move them to take action to bring about social and political change" (p.3). This view of transformative learning is about the education of social systems of oppression and privilege in the process of social transformation (Taylor & Cranton, 2012). Emancipatory learning challenges power relations based on gender, race, class, sexual orientation, dis/ability, or religion (Taylor & Cranton, 2012). Mezirow (1981) states that emancipatory learning, with its emphasis on learner transformation, can only take place in adulthood because that is the time when a person can recognize being caught in his/her own history.

The work of Paulo Freire has informed much of the writings related to emancipatory learning (Imel, 1999). Freire (1970) worked to deconstruct power structures and helped to educate the oppressed so they could develop ways of knowing how to challenge and resist these structures. Freire used problem-pose education as an alternative to the banking model of education with the oppressed people of Brazil. Rather than knowledge being deposited from the

teacher to the student, as in the banking model, problem-posing emphasized the use of dialogue, critical thinking, reflection, and action for the purpose of liberation. Freire (1970) stated,

> Education as the practice of freedom-as opposed to education as the practice of domination-denies that man is abstract, isolated, independent, and unattached to the world; it also denies that the world exists as a reality apart from people. Authentic reflection considers neither abstract man nor the world without people, but people in their relations with the world (p. 81).

Learning that is emancipatory includes not only understanding existing power structures but how to resist and challenge these structures and their underlying ideologies (Imel, 1991). Emancipatory learning becomes transformative when it emphasizes critical reflection and leads to some kind of action for political and social justice.

Theory in Progress: Working Towards Integration

Transformative learning theory is a relatively new theory and according to Cranton (2016) is a theory in progress. Cranton (2016) stated,

> Transformative learning theory is a theory in progress in terms of not only how people are thinking about and elaborating on it but also how the expanding body of research is supporting and asking questions of the theoretical developments…Research that includes spirituality, relational knowing, and authenticity are beginning to help us grasp how the various perspectives complement and elaborate on each other. Perhaps most importantly, those individuals who are involved in the continued development of

> transformative learning theory are engaged in intentional efforts to expand our thinking (p. 45).

Cranton's and Taylor's (2012) model integrates the various strands and provides an integrated theory of transformative learning. Cranton and Taylor (2012) stated that,

> [T]here is a diversity of theoretical perspectives, which brings a rich complexity to our understanding of transformation, but there is also a tendency to think in dualisms. For example, theorists and researchers write about rational or extra-rational processes, a focus on individual change or a focus on social change, autonomous learning or relational learning. However, these perspectives, and many others…can coexist. It may be that for one person in one context, transformative learning is rational endeavor; for that same person in another context, individual transformation drives social transformation, and so forth. The outcome is the same or similar-a deep shift in perspective, leading to more open, more permeable, and better-justified meaning perspective-but the ways of getting there can differ depending on the person or people and the context or situation (pp. 1-3).

Thus, having a more unified theory would allow researchers to continue to speak of transformative learning while maintaining the diversity of approaches that are so important to the complexity of the field of adult education (Cranton & Taylor, 2012). The following section, discusses the relevance that transformative learning theory had on this research study of teacher leadership.

Relevance to This Research on Teacher Leadership

"Transformative learning suggests not only change in what we know or are able to do but also a dramatic shift in how we come to know and how we understand ourselves in relation to the broader world" (Dirkx, 2012, p.116). In the work teacher leaders undertake, learning experiences may be stimulated by people, events, or changes in contexts that challenge teacher leaders' basic assumptions of the world (Harris, Lowery-Moore, & Farrow, 2008). Teacher leaders may critically examine and reflect on their assumptions, values, beliefs, experiences, and worldviews (Harris, Lowery-Moore, & Farrow, 2008). This study focused on how former teacher leaders made sense of their teacher leadership experiences and transformed as educators. Hence, "It is experience, particularly prior experience (that happened in one's past), that is the primary medium of a transformation, and it is the revision of the meaning of experience that is the essence of learning" (Taylor & Cranton, 2013, p. 35). Transformative learning theory provided the foundation for understanding the learning dynamics that former teacher leaders experienced when they 1) critically reflected on their beliefs, values, and perceptions, thus, opening their minds to the ways they construe the meaning of their experiences, 2) explored their role as teacher leaders and the actions they took to create a positive impact on their schools/districts, and 3) acquired new knowledge and skills to build their competence and confidence in their teacher leader roles.

Conclusion

Mezirow (1991) stated that the principle goal of adult learning is transformative learning. Since 1978, when Mezirow introduced transformative learning as a theory, the idea has stimulated a diverse body of theoretical, empirical, and practical work. These works expanded on Mezirow's ideas and broadened transformative learning theory in many new directions. In

summary, transformative learning takes learners on a journey that "move in and out of the cognitive and the intuitive, of the rational and the imaginative, of the subjective and the objective, of the personal and the social" (Grabove, 1997, p. 95). Moreover, it is this journey of self-awareness and perspective that capitalizes on the need to expand the research of teacher leadership applying the lens of transformative learning theory.

In the next chapter, the methodology for the research study is explained. The chapter provides details about the method, participants, procedures, and data analysis.

Chapter 3: Methodology, Methods, and Procedures

Methodology

In order to understand the way former teacher leaders, make sense of their teacher leadership experiences, I used qualitative research methods to study the social phenomena. Specifically, I applied a phenomenological approach to this research study. The objective of this approach is to gain information about how people make sense and understand the context of the social world they live (Corbin & Strauss, 1994; Mishler, 1979; Warren & Karner, 2010). Mishler (1979) states, "Scientific research is itself a social enterprise, subject to a variety of social forces [and]…the *context* dependence of human meaning and action" (p. 17). Qualitative methodology is the research that produces descriptive data of peoples own written or spoken words and observable behaviors within the context of their social world (Taylor & Bogdan, 2016). Taylor and Bogdan (2016) express, "Qualitative researchers are concerned with the meaning people attach to things in their lives…hence qualitative research is understanding people from their own frames of reference and experiencing reality as they experience it" (p. 7). Therefore, this research study utilized qualitative research methods using a phenomenological approach to gain information about how teacher leaders made sense of their teacher leadership experiences.

Data Collection Instrumentation

Semi-structured interviews and focus group served as the best devices for answering the research questions and to achieve the goals of this research. According to Bogdan and Biklen (2007), "…many sources of data [are] better in a study than a single source because multiple sources lead to a fuller understanding of the phenomena you [are] studying" (pp. 115-116). The

data collection instruments of semi-structured interviews and focus group provided diversity and rich opportunities for cross validating research procedures, findings, and theories (Brewer & Hunter, 2006). The design of semi-structured interviews and a focus group generated valuable conversations surrounding the research questions with the participants, either on a one to one basis or in a group setting. The questions created an opportunity for the participants to reflect on their teacher leadership experiences and ways in which these experiences transformed who they are as educators.

Interviews. Qualitative interviewing is the interaction between the researcher and the participant. It is conversation or narrative in nature, in which, to derive interpretations, not facts from respondent talk (Gubrium & Holstein, 2001; Warren, 2002). Qualitative interviewing aims to learn how people understand their lived experiences and the meaning they make of those experiences; their perceptions, reflections, and feelings. Miller and Glassner (1997) call this approach a "methodology for listening." Interviewing is a guided conversation, in which, the researcher carefully listens *as to hear the meaning* of what is being conveyed by the participants (Rubin & Rubin, 1995). I used the method of interviewing, which enabled me to get closer *as to hear the meaning* of former teacher leaders' experiences and how they encountered a transformation as educators. I listened for the patterns and themes that were shared by the participants to understand how the participants made sense of their teacher leadership experiences.

"Perspective is especially significant in qualitative interviewing, where meaning making is center stage in the interpretive process" (Warren, 2001, p. 84). During an interview, the perspective of the respondents may shift from one standpoint in their experience to another (Warren, 2001). Although situational, these perspectives shape the flow of the interview, and in

its qualitative version, are taken into account by the interviewer in understanding the meaning making process (Warren, 2001, p. 84).

Qualitative interviewing is used to gather information that cannot be obtained using other methods (Tierney & Dilley, 2002). According to Tierney and Dilley (2002),

> Surveys might offer mass data about a particular issue, but they lack the depth of understanding that a qualitative interview provides. Observations can certainly lead to insights about, say, interactional styles of teachers with students or patterns of behavior in a classroom, but without interview data gathered directly from the participants/actors, observation is akin to watching silent movies. For these reasons alone, the interview has become the most common qualitative tool that researchers employ in education (p. 454).

Hence, I wanted to understand how teacher leaders made sense of their experiences as leaders and how their experiences transformed them from teacher to leader. Using the technique of interviewing, enabled me to gather the in-depth data needed to understand this phenomenon.

Multiple one-to-one interviews were conducted for this study using a semi-structured interview process with each of the former teacher leader participants. While a structured interview process has a set of questions that does not allow for departure from the theme of the interview, a semi-structured interview process is open, allowing for new ideas and direction. Taylor and Bogdan (1998) suggested that "by asking structured or force-choice questions initially, the researcher creates a mind-set in informants about the right or wrong things to say that can make it difficult if not impossible to get at how they really see things" (p. 102).

According to Corbin and Strauss (2015), "In semi-structured interviews, the same topics are covered in each interview. After the questions on the list have been covered, participants are free to add anything else to the interview that they might feel is relevant to the discussion" (p.39). The questions for the interviews were derived from the review of literature on teacher leadership, my understanding of transformative learning theory, and the need to expand on the findings from my pilot studies on teacher leadership.

According to Rubin and Rubin (1995) qualitative interview uses three kinds of questions: main questions that begin and guide the conversation, probes to clarify answers or request further examples, and follow-up questions that pursue the implications of answers to main questions. Although, the semi-structured interview process was established, with general concepts and themes, it helped to provide some structure to the interviews, however, it was the participants' responses that guided the interviews and prompted additional follow up questions. The additional questions centered around explaining their responses in more detail or clarifying their responses for better understanding. The main questions for the interviews were as follows:

1. How would you describe your former position as a teacher leader?
    a. Your title as a teacher leader
    b. Length of time in the position
    c. Job role and responsibilities
2. What interested you in becoming a teacher leader?
3. Could you describe the ways you prepared for the role (coursework, professional development, etc.)?
4. During your time as a teacher leader, what knowledge and/or experiences led you to develop a deeper understanding of the role?

   a. In what ways are you seeing familiar concepts from a different perspective?

5. What did you perceive to be your professional identity during that time?
   a. How as that changed from your teacher role?
6. How had the culture in your school and/or district play a part in your growth or change as an educator?
7. How did your perception about the field of education change while in the role of a teacher leader?
   a. What was different about the way you saw yourself within the organization you worked as a teacher leader?
8. What personal and/or professional transformations have you experienced during your time as a teacher leader?
   a. Relating to your beliefs, values, and perspectives
   b. Relating to your historical background, racial perceptions, and ethnicity
9. After the role of teacher leader, what role did you involve yourself in?
   a. What led you to that role?
   b. How did being a teacher leader, prepare you for that role?
10. At this point, please feel free to add anything else to the interview that you might feel is relevant to the discussion.

The first round of interviews lasted between 60 to 90 minutes each. After analyzing these initial interviews for concepts and themes related to teacher leadership, I conducted second and third round interviews to clarify responses or to ask expanding questions to participants' responses. Second and third round interviews lasted between 45 to 60 minutes. The interviews were conducted in a place of the participants' choice such as the participants' place of work or a

local coffee shop. Emails and phone calls took place with the participants to arrange the interview location, date, and time. Emails also served a purpose with a few participants (Nicole and Justin) to clarify their responses and ask follow up questions, as availability to meet in person was limited for those participants.

The interviews were audio recorded for the purpose of collecting accurate data. The audio recordings were transcribed and coded for concepts, themes, and ideas. Audio recording the interviews allowed for me to focus on the participants' responses and helped to prepare me for clarifying questions at the follow up interviews. Analytical memos were written throughout the data collection process to record my thoughts, reflecting on the process, and to help keep myself thinking about the discoveries of the study. These analytical memos supported my interpretation of the data. The analytical memos were my reflections on how I related personally to the participants and the phenomenon, how the participants related to each other, about the interview questions, about my coding choices, connections to the theory, and additional teacher leadership literature to review.

Focus Group. Focus groups are an important way of learning what former teacher leaders think about the topic of teacher leadership and their lived experiences, perceptions, and transformation in the field of education. As Williams and Katz (2001) noted, "a focus group is defined as a small gathering of individuals who have a common interest or characteristic, assembled by a moderator, who uses the group and its interactions as a way to gain information about a particular issue" (p. 2). According to Kruger and Casey (2000), the purpose of focus groups is to promote a comfortable atmosphere of disclosure in which people can share their ideas, experiences, and attitudes about a topic. Participants "influence and are influenced", while the researcher plays various roles such as facilitator, listener, observer, and inductive analyst

(Kruger & Casey, 2000). Flores and Alonso (1995) conjure the interactions between the participants are as important as the interaction between the interviewee and the interviewer. "In fact, focus group research is about establishing and facilitating a discussion and not interviewing a group by exchanging questions and answers between the interviewee and interviewer" (p. 85). While Bogdan and Biklen (2007) state, the purpose of focus groups is to "…stimulate talk from multiple perspectives from the group participants so that the researcher can learn what the range of views are, or to promote talk on a topic that informants might not be able to talk so thoughtfully about in individual interviews" (p. 109).

Many researchers (Cohen & Engleberg, 1989; Fielding & Fielding, 1986; Flores & Alonso, 1995; Morgan, 1988) believe that focus groups are essentially complementary techniques of qualitative studies, to be used as a research method along with other techniques of data gathering. By employing both interviews and focus groups, Williams and Katz (2001) suggest that the combined application of these methods allows for a more detailed understanding of the research topic. For this study, interviews and focus groups complement each other to help obtain more meaningful data on the topic of teacher leadership.

With this research, designing the focus group is highly important. As recognized by Catterall and Maclaran (1997),

> The focus group is not a natural social setting even when groups of friends or colleagues are convened in a 'natural' setting such as one of the participant's homes or a workplace cafeteria. Nor is the discussion in a focus group a 'natural' conversation since few 'natural' conversations focus on a single topic for such a sustained

> period of time under the direction, active or passive, of a moderator (Para.3.6).

Therefore, attention to the details of planning the focus group will help to improve the quality of data obtained from the group (Jarrell, 2000). Appendix B outlines the details for the focus group that include the opening script for the facilitator and the promise of confidentiality.

The focus group was planned to occur after the final round of semi-structured interviews. All of the participants interviewed were invited to join the focus group. Three pre-arranged dates and times were presented to the participants, in which, they selected all the dates and times that worked best with their schedule. The date and time with the most responses was the one used for the focus group meeting. Three of the eight participants were able to be a part of the focus group, as complex schedules did not allow for the other five to participate. The participants who took part in the focus group were Jodi, Terri, and Sally. The questions asked during the focus group were developed from the initial data analysis of the participants' individual interviews and the concepts and themes created from analyzing the interview transcripts. Structuring the focus group in this fashion allowed for a deeper understanding of teacher leadership. The questions were a way to expand on the thoughts and responses the participants provided from the interviews. The focus group questions were as followed:

1. Please introduce yourself to the group and tell us where you were a teacher leader.
2. How did you overcome the unfamiliarity of being a teacher leader?
3. At times, when you were teacher leaders, you expressed you may not have felt valued, please describe why you had those feelings.
4. Some of you described that parts of your job as a teacher leader were a catch-all role or being responsible for tasks that did not relate to being an instructional coach.

   a. How did this influence you as an educator?
   b. What did you learn about how the role was structured?

5. You shared that there was a learning curve while in the position of a teacher leader.
   a. Why did you express this sediment?
   b. How did this learning curve change you as an educator?
6. You shared that providing professional development to teachers/staff was a responsibility of a teacher leader.
   a. How did you prepare for being a staff developer?
7. While in the role of teacher leader, you worked with many teachers and administrators.
   a. If you had the opportunity after being a teacher leader to go back into the classroom as a teacher, what would you do differently?
   b. If your goal was to become an administrator, how did your teacher leadership experience prepare you for that positon?
8. If you could be a teacher leader again, what would you do differently?
   a. How would you structure the position?
9. Many of you described that it was difficult to understand your identity as a teacher leader.
   a. What did you learn from that experience?
10. You shared that the leadership in the building helped you to grow as an educator.
   a. What characteristics did you value?
   b. Do you see yourself as having those characteristics?
11. How did your setting (urban, suburban, rural district) attribute to your growth as a teacher leader?

12. Describe your thoughts about being in a supporting role working with teachers, administrators, and other staff?
    a. How does this differ from being a teacher?

The focus group discussion was audio recorded for the purpose of collecting accurate data. The audio recording was transcribed and coded for concepts, themes, and ideas. Audio recording the focus group discussion allowed for me to pay attention to the participants' responses. An analytical memo was written after the focus group meeting to record my thoughts, reflecting on the process, and to help keep myself thinking about the discoveries of the study. This analytical memo supported my interpretation of the data from the focus group.

The three participants shared commonalities from their teacher leadership experiences and professional experiences as a whole. The dynamic of the group encouraged conversations that went beyond the prepared focus group questions. They shared personal experiences, insightful knowledge, and discussed learned skills from their teacher leadership journey. From this experience, the participants expanded their network of education professionals.

Participants

For the purpose of this study, identifying a specific definition of teacher leadership helped to establish the parameters for participant involvement. For the purpose of this study on teacher leadership, in which, the ways teacher leaders made sense of their experience, the definition provided by Berg, Horn, Supovitz, and Margolis (2019) complements this research. Berg, Horn, Supovitz, and Margolis (2019) define teacher leadership in the following manner:

> Teachers' support of the improvement of teaching and learning beyond their own classroom…teacher leadership recognizes teachers' instructional expertise as an asset for educational

> improvement, capitalizes upon teachers' relationships with their colleagues to support change, and may provide career advancement opportunities to improve job satisfaction and the professionalization of teaching (p. 3).

To gain a thorough understanding of teacher leadership, this study recruited former formal teacher leaders, currently in a different position in the education field, such as an administrator, back to their position as a teacher, or in another teaching position.

A participant, according to Warren (2002) is, "Someone who responds-someone who is willing and able to talk to the interviewer" (p.90). My goal was to interview eight to ten former teacher leaders from the northeastern United States. I was able to recruit the participants from my pilot study on teacher leadership by asking for their contribution to my research again (Jodi, Terri, and Sophia). These three participants and I were former co-workers. These participants were key to furthering my knowledge on the topic as their prior responses helped guide the focus of this dissertation in the direction of how they made meaning of their teacher leadership experiences. I also reached out to another former co-worker who I knew fit the criteria of the study (Scott). To recruit additional participants, I contacted colleagues and friends who work in area schools to refer me to participants. I obtained the names of sixteen more potential participants. I contacted each of these potential participants informing them of my research study and the participant criteria. Four of these sixteen (Sally, Justin, Nicole, and Kelly) meet the criteria and were willing to participant in my research. Therefore, securing a total of eight participants for the study.

To establish trust, participants were assured of anonymity prior to their participation in the study. Informed consent was obtained from each participant and appropriate permission

from the Instructional Review Board was obtained for conducting the interviews and focus group. At the beginning of the interviews and the focus group, I informed the participants about the purpose of this study and the importance of their involvement. The interviews and focus group began with small talk, establishing common ground to build a relationship with the participants and to help put them at ease (Bogdan & Biklen, 2007).

From the information gained about teacher leadership from my pilot research study, former teacher leaders (teachers who have moved on to other educational positions) have provided broader perspectives and insights of the social phenomena, than current teacher leaders. This thought may be attributed to the former teacher leaders' reflections of their past professional experiences. The participants are able to see through the habitual way that they have interpreted the experience of everyday life, in order to, reassess previously unquestioned meaning schemes or perspectives (Cranton, 2016; Dewey, 1933; Mezirow, 1991). Current teacher leaders may be too immersed in the job to experience in-depth reflection, whereas, former teacher leaders have the gift of time and separation on their side.

I searched to employ a diverse group of participants, in relation to gender, ethnicity, and years of teaching/leadership experience. I sought to gain a diverse participant pool from various backgrounds, experiences, and perspectives. The participants comprised of 6 females and 2 males (1 male identified as cisgender and queer); 7 white participants (5 females and 2 males) and 1 black participant (female); 6 of the participants were teacher leaders from urban school settings, 1 participant was from a suburban school setting, and 1 participant was from a rural school setting. The participants' years of teaching/leadership experience, ranged between 10 to 20 years. Because of practical and logistical reasons, I limited the study towards eight participants. Karp (1996) stated, "One does not need huge sample sizes to discover underlying

and repeating forms of social life that, once described, offer new levels of insight for people" (p. 202).

Each of the participants' background and history is unique and specific to their lived experiences. It is important to this research to describe the participants of study because the constructs of their background help in the understanding of how they see themselves as educators and teacher leaders. *Figure 3.1* is an illustration of the participants' background and demographics.

Participant: Jodi

Jodi was one of my first participants, who took part in the pilot study I conducted on teacher leadership. She agreed to work with me again for this dissertation study. Jodi identifies as a white female in her mid-forties. Jodi shared that she has been married to her husband for twenty years and they have two teenage sons. Jodi was the youngest of nine siblings, therefore, by default, she confidently expressed, from an early age, she learned how to understand and collaborate with people. Jodi grew up in a suburb of a large city in the northeast. She shared that she attended a private all-girls school for her formal K-12 education. It wasn't until college that she attended school with males.

Jodi received her bachelor degree in English and her master's degree in secondary English in education. During her time as a teacher, Jodi valued being a life-long learner and decided to continue her education by working towards a Certificate of Advanced Study in Educational Leadership. She took classes throughout her time as a teacher and later completed the degree during her time as a teacher leader.

Jodi's professional career in education began as a director at a learning center that provided tutoring to students. During that experience, she learned about running a business and

how to manage people in a work environment. After that experience, Jodi became a high school English teacher for eight years. She taught in a large urban public district in the northeast. This high school was one of the district's most challenging in academic and behavioral needs. The student demographics at this high school consisted of 43% Black or African American, 23% Hispanic/Latino, 22% white, 10% Asian, 1% multiracial, and 1% Native American. 83% of the students were economically disadvantaged, 15% were English Language Learners, and 28% were students with disabilities. Jodi described this school as a "persistently low achieving school." Even though this was a challenging experience, Jodi spoke highly of her time as a teacher in this school. She attributed her positive experience to her relationship with the building principal. This principal was a mentor and role model for Jodi as she was growing her craft as an English teacher. This principal provided her feedback on her instruction and helped her make improvements. Jodi felt that the staff and students were like one big family. Her students were from diverse backgrounds and Jodi's goal was to provide learning experiences to meet the needs of all her students.

The district received a grant to help develop teacher skills and knowledge in teaching students in reading. Jodi was encouraged to apply to become one of the strategic reading coaches (teacher leaders). She was reluctant to leave teaching but she wanted to work with other teachers to help them with their instructional techniques to improve students' reading abilities. Jodi received the position and underwent intensive professional development in the science of reading and how to teach reading to students. The professional development also taught Jodi how to support teachers who were teaching these reading courses to students who were two to three years behind grade level. Jodi was able to stay in the school where she was an English

teacher and support the teachers in her role as a strategic reading coach. As part of the grant, Jodi had to also work in another high school in the district, part of the time.

After three years, the strategic reading program ended because the grant funding ceased. The district shifted Jodi's position to a literacy instructional coach, in which, the district funded the position. She continued working in two high schools in the district supporting teachers in English Language Arts by modeling lessons, co-teaching with teachers, and providing them feedback on their instructional practices. Jodi was in a formal teacher leadership position for a total of eight years.

Participant: Terri

Similar to Jodi, Terri was one of my first participants, who took part in an earlier study I conducted on teacher leadership. She agreed to work with me again for this dissertation study. Terri identifies as a white female in her mid-thirties. Terri shared that she is married. Terri and her husband have a young daughter and a new born son. Terri grew up in a mid-sized city in the northeast. Her family lived in university housing, which was associated with her father's job. This housing was mainly for, but not in Terri's situation, foreign exchange students and their families who attend the university. She attended the local urban public school in her neighborhood until seventh grade. Her father received a new job in the area, which, allowed for Terri to attend a private school until graduation. She shared that her life would have gone in a different path if it was not for transferring to the private school. She recalls prior to transferring schools, Terri did not take education very seriously. If she stayed, she might have never gone to college or become an educator.

Terri has a bachelor degree in elementary education and a master's degree in English for Second Language Learners. While a teacher, Terri's principal saw leadership potential in her

and encouraged her to go back to school for an educational leadership degree. She thought her impact in education would reach further if she learned to be an educational leader. During this time Terri began working on a Certificate of Advanced Study in Educational Leadership. Terri completed the program during her time as a teacher leader.

Terri's teaching career began in the same city she grew up in. She taught middle school English and English as a Second Language at a charter school for six years. Terri felt she reached a ceiling at that school and transferred to the public school district to teach English as a Second Language at the middle school level. The district offered her many opportunities to learn and grow as a teacher. The school she was teaching in was considered a low performing school and presented itself with academic challenges. The student demographics consisted of 46% black or African American, 39% Hispanic/Latino, 9% white, 3% multiracial, 2% Native American, and 2% Asian. 89% of the students were economically disadvantaged, 26% of the students were English Language Learners, and 14% were students with disabilities. During this time, Terri supported teachers with lesson plans and instructional techniques to help improve English Language Learners' academic success. She collaborated with teachers to created curriculum in English Language Arts to support the needs of English Language Learners.

The district was looking for a literacy coach [teacher leader] to support the academic needs in her school and Terri's English as a Second Language supervisor encouraged her to apply for the position. At this point in Terri's career, she had been a teacher for seven years. Yet, Terri's time as a teacher in that school had only been for one year, she was yearning for the opportunity to have a larger impact within the school, hence, becoming a literacy coach would help her gain more experience and better insight into educational leadership. Terri held this teacher leadership position for two years.

Participant: Sophia

Similar to Jodi and Terri, Sophia was also one of my first participants, who took part in my pilot study on teacher leadership. She agreed to work with me again for this dissertation study. Sophia identifies as a white female in her late thirties. She is married to her husband of twelve years. She expressed to me that she is a vegetarian and works hard to stay fit. She values her health and staying active. She also does this to support her husband who is a diabetic.

Sophia has a bachelor degree in early childhood education and a master's degree in special education, in which, she obtained both degrees from the same college in the northeast. Sophia wanted to expand her knowledge in the field of education and was interested in learning more about educational leadership. While in a teaching position, Sophia succeeded in completing an online program to acquire a certificate of advanced study in educational leadership.

Sophia began her career in education as a special education teacher at the elementary level. She taught in a mid-sized rural school district. There were three elementary schools in the district, in which, her school was the smallest with about 250 students. The student demographics consist of 94% white students, 4% Hispanic/Latino students, and 2% multiracial. 62% of the students were economically disadvantaged and 10% were students with disabilities. She viewed the staff at the school to be collaborative in nature and supportive of student needs. Sophia was the special education teacher in a self-contained classroom consisting of eight or less students. Sophia worked closely with general education teachers planning lessons and co-teaching to help support not only her students but all the other students in the grade level. Teaching assistants and teacher aides were present in her classroom at all times to support the needs of the students. Sophia provided professional development to the teaching assistants and

teacher aides in areas such as English Language Arts, by providing them strategies to help the students they work with learn.

During this time, Sophia was also working towards a certificate of advanced study in educational leadership. Sophia views herself as a life-long learner and wanted to expand her knowledge in the field of education. After ten years as a special education teacher, Sophia felt it was the right time to advance her career in education.

Hence, Sophia's district was awarded a grant to support teacher development by creating a position for a K-8 English Language Arts instructional specialist, wherein, Sophia received the position. She provided support to teachers in the three elementary buildings and the middle school in English Language Arts instruction, assessments, and interventions. Similar to Terri, Sophia designed and facilitated professional development sessions in area of English Language Arts. She worked alongside teachers in the classroom by planning lessons, demonstrating instruction, and providing instructional feedback. Sophia facilitated data meetings with grade levels. In these meetings, teachers would review student assessment performance and determine appropriate interventions for at-risk students. Sophia also helped with creating English Language Arts curriculum for grades K-8. Sophia served in the teacher leadership role for two years before moving on to an administrative role. Shortly after Sophia left this position, the position was not funded by the grant money anymore and the district had no choice but to abolish the position as there were no district funds available to sustain it.

Participant: Sally

Sally identifies as a white female in her early thirties. She is married and has a toddler son with her husband. She currently lives in a suburban town. Sally grew up in a small rural historical town in the northeast. She attended the same public school from kindergarten to

twelfth grade. Her perception of the field of education was limited based on her experiences growing up in a small town.

Sally received a bachelor degree in elementary education and a master's degree in literacy. While in her teacher leadership position, Sally felt she needed to understand leadership better. She felt uncertain of her abilities and skill level to lead adults. She decided to go back to college to work on a certificate of advanced study in educational leadership with hopes of understanding adult learners better and how to lead adults.

For a short period of time, Sally began her career in education teaching universal pre-kindergarten and then was a part time reading teacher. Later, she took a second grade teaching position in a large suburban public school district. She was a second grade teacher for five years. The school Sally taught in had a good academic record for steady student growth. This school took pride in its character education program and was recognized as a national school of character. The student demographics consisted of 77% white, 7% Hispanic/Latino, 6% Black/African American, 6% Asian, 4% multiracial. 43% of the student population were economically disadvantaged, 18% of the student population were students with disabilities, and 4% were English Language Leaners. Sally enjoyed being a second grade teacher but had a passion for literacy with hopes of being a reading teacher in the future.

A district-wide K-8 reading instructional coach position had opened up in Sally's district. Through word of mouth, one of the district level administrators heard that Sally might be interested in the position. This administrator encouraged Sally to apply. She interviewed and received the position. Sally was excited about the opportunity to be a reading instructional coach as Sally is passionate about the topic of literacy.

Participant: Scott

Scott identities as a white male in his mid-forties. During our interview, Scott shared with me that he was recently married. He has three children, all teenagers, from a prior marriage. Scott grew up in a suburban area in the northeast. The public school district he attended as a child is a large suburban district. He shared that he graduated with about 600 other students. Scott was an athlete in high school and in college, playing lacrosse as his primary sport.

Scott received a bachelor and master's degree in elementary education. After teaching at the elementary level for 10 years, Scott was ready for a change in his career and hoped to have the opportunity to move up the career ladder in education. He began working on a certificate of advanced study in educational leadership during his time as a teacher and finished this degree during his time as a teacher leader.

Scott was an elementary teacher for ten years. He taught fourth and fifth grade in a large urban public school district in the northeast. The student demographics of the school consisted of 75% black or African American, 13% white, 6% Hispanic/Latino, 4% Native American, 2% multiracial, and 1% Asian. 82% of the student population were economically disadvantaged, 25% were students with disabilities. This school was a low performing academic school. Scott has a strong interest in learning new methods for teaching mathematics and helping with student improvement. Scott worked with a principal who saw something in his approach to teaching and asked Scott if he would consider becoming the building mathematics instructional coach. Scott thought this opportunity came at the right time. Scott was ready for a new challenge in his career. He did not feel he could sustain doing the same thing much longer, as there is not much career advancement in a teacher role.

Therefore, Scott embraced the challenge for five years as a teacher leader in the building where he was a teacher, along with working, one day a week in another elementary building. During that time, he held a few teacher leadership titles as the role of instructional coach in that district was driven by grant funding. Scott's teacher leadership positions did vary throughout the five years. Scott began his teacher leadership tenure as a mathematics instructional coach and later the title was changed to STEM (science, technology, engineering, and math) instructional coach, in which, he focused on mathematics. He was an Annual Professional Performance Review (APPR) liaison at the same time as being the mathematics and STEM instructional coach. His last title, was formative assessment/mathematics coach. His role with all these titles involved working with teachers in the classroom to improve instruction.

Participant: Justin

Justin grew up in a rural area and attended a large rural public school district. He lives in the same area where he grew up and is a small farm owner. He runs a small business out of the farm selling lotions and soaps made from goat's milk. Justin is a white male in his mid-thirties. He identifies as a cisgender gay male but he actually prefers the term queer. He has been married to his husband since 2011. Together they have three sons. Two of his children are teenagers and one is seven years old.

Justin has a bachelor degree in secondary English and a master's degree in literacy. While a teacher leader, he wanted to continue his education and began the coursework towards a certificate of advanced study in educational leadership. He recently completed the certificate requirements during his time as a teacher leader.

Justin started his educational career as a teaching assistant in the district where he went to school. The teachers he worked with and the building principal inspired him to continue on with

his education to become a teacher. He valued their feedback and worked to become a secondary English teacher. He was hired in a large urban public school district in the northeast. The high school Justin taught at was one of the better performing high schools in the district but still had its academic challenges. The student demographics at this high school consisted of 40% black or African American, 34% white, 12% Hispanic/Latino, 10% Asian, and 3% multiracial. 69% of the student population was economically disadvantaged, 19% were students with disabilities, and 13% were English Language Learners.

Justin appreciated his time as a teacher and had no plans of leaving the classroom, however, he was interested in helping the district in more ways. Justin was a part of numerous committees in his school and in the district. He served on the school leadership team, a district-wide committee to update the code of conduct, and he was an active member on the teacher union board. After eight years of teaching, Justin took a teacher leadership position in the district. Justin became a district-wide annual professional performance review (APPR) and instructional liaison. Justin worked with district level administrators to help develop guidance for staff on understanding the district's APPR plan and provided professional development for the staff to comprehend this process. He assisted the human resource office with staff evaluation scores and potential evaluation appeals. He worked closely with the state's teacher union and the district's teacher union.

Participant: Nicole

Nicole identifies as a single black female in her late forties. She grew up in a mid-size city in the northeast. She attended school at a large urban public school district as a child and is employed in this school district today. Nicole has always seen herself as an athletic person. She

was involved in sports through high school and college. She has been honored as a top athlete in track and field while in high school and college.

Nicole has a bachelor and master's degrees in secondary English. She was encouraged by the building principal, she worked with as a teacher, to pursue a degree in educational leadership. She began working on a certificate of advanced study in educational leadership during her third year as a teacher leader. When I met Nicole, she was an administrative intern, which was the final requirement of the educational leadership program.

Nicole was a secondary English teacher at a large urban public school district. She was a high school English teacher for a few years and then moved to teaching middle school English. The middle school was a low performing school. The student demographics of the school consisted of 36% black or African American, 34% white, 14% Asian, 11% Hispanic/Latino, 4% multiracial, and 1% Native American. 81% of the student population were economically disadvantaged, 21% were students with disabilities, and 20% were English Language Learners. Nicole was a passionate English teacher who strived to help her students be successful.

During her eighth year of teaching, she was approached by her building principal to apply for a teacher leadership position that became available in her building. Nicole was happy as an English teacher. The thought of leaving the classroom did not cross her mind until she was approached by her principal with the idea of the teacher leadership position. She did not want to let her principal or the school down, thus, Nicole became the multi-classroom leader for four years. Nicole's role of multi-classroom leader comprised working with teachers to improve their instruction. She often would lesson plan with teachers, co-teach, and provide instructional feedback.

Participant: Kelly

Kelly identifies as a white female in her mid-thirties. She grew up in a suburban area in the northeast and still resides in the area with her husband. Kelly has two young daughters and enjoys spending a great amount of time with her family. She has shared that she is passionate about being an educator. She sees herself as an advocate for English language learners. Kelly recognizes the importance to learn about their background and culture, which is the vehicle that will open the doors to their learning. Kelly believes in providing these students a plethora of educational experiences in the United States that will prepare them for their future.

Kelly received a bachelor degree in Teaching English to Speakers of Other Languages (TESOL). She received a master's degree in elementary reading and literacy. While in her teaching position, Kelly decided to go back to college to pursue a certificate of advanced study in educational leadership.

Kelly was an English as a new language (ENL) teacher for six years in a small urban public school district. During this time, she supported English language learners at the high school level by teaching them how read, write, and communication in English. The student demographics at the high school was made up of 92% white, 3% Hispanic/Latino, 2% black or African American, 1% multiracial, and 1% Asian. 58% of the students were economically disadvantaged, 16% were students with disabilities, and 2% were English Language Learners. Kelly would support teachers who had English language learners in their classroom by co-teaching with the teachers and tailoring lessons to aid in the learning of students. Kelly also supported teachers by providing professional development to help teachers learn more about how students learn English and learn in a new environment that is different than their home country.

Kelly's district received grant money for supporting teacher development through engaging teachers to become formal teacher leaders. As a result of Kelly's involvement with supporting teachers in her role as an ENL teacher, the district offered her a position at the middle school as an instructional coach. Kelly worked with all teachers helping them to improve instruction by lesson planning, co-teaching, and providing them feedback. She also supported teachers at this level to gain knowledge about the backgrounds and learning styles of English language learners. Kelly was an instructional coach for three years before moving into administration.

Participants	Participants' Demographics	Age Range of Participants	District Information	Participants' Self-Identification as an Educator Before Becoming Teacher Leaders	Formal Title as Teacher Leader
Jodi	Female, White	41-50	Large Urban	High School English Teacher	ELA Instructional Coach
Terri	Female, White	31-40	Large Urban	Middle School ENL Teacher	ELA Instructional Coach
Sophia	Female, White	31-40	Small Rural	Special Education Teacher	District Wide ELA Instructional Coach K-8
Sally	Female, White	31-40	Large Suburban	Elementary Teacher	District Wide ELA Instructional Coach K-8
Scott	Male, White	41-50	Large Urban	Elementary Teacher	Mathematics Instructional Coach
Justin	Cisgender Gay Male, Queer, White	31-40	Large Urban	English Teacher	District Teacher Evaluation and Instructional Liaison
Nicole	Female, Black	41-50	Large Urban	High School & Middle School English Teacher	Multi-Classroom Leader
Kelly	Female, White	31-40	Small Urban	ENL Teacher	Building Instructional Coach

Figure 3.1 Summary of Participants' Background and Demographics

Setting

From my preliminary studies, I have learned that the northeast area of the United States has experienced a movement towards employing teachers in teacher leadership positions. Therefore, my participant pool was from this geographic setting. I interviewed former teacher leaders who were employed in various school/district settings-urban, suburban, and rural.

To gain a better understanding of the participants and to learn how they made meaning of their teacher leadership experiences, all of the interviews were held at the participants' place of work or an agreed upon neutral location such as a local coffee shop. The settings selected were most convenient for the participants and helped to increase the participants' level of comfort and encouraged them to share information about their experience.

The location for the focus group was an easily accessible venue that was familiar, comfortable, and free from interruptions. Comfortable, relaxed surroundings tend to enhance the quality of the data collected (Jarrell, 2000). I selected a private conference room, within a centrally located coffee shop. The room was equipped with an oval conference table that aided in the development of dialog with and among the participants.

Data Analysis

Formal analysis of the transcribed interviews, focus group data, and the analytical memos began early in the collection process and occur throughout the data collection phase. This form of analysis is the constant comparative method (Bogdan & Biklen, 2007; Corbin & Strauss, 1994; Glaser & Strauss, 1967; Strauss, 1987). During the participant interviews, key issues, events, and themes began to formulate as my beginning thoughts are recorded. This initial analysis led to more in-depth thinking about how the participants made sense of their teacher

leadership experiences and helped to construct the remaining interviews and the development of the focus group conversation.

As I read through the data constructed from the interviews, I looked for certain words, phrases, and perspectives that repeated and stood out to develop a coding system. Tracy (2013) recognizes that "…interpreting qualitative data is an indescribably ambiguous process, filled with reading the data, reflecting on the literature, thinking, note-taking, writing, and thinking some more" (p. 207). But during these moments, as Tracy (2013) knowledges, "qualitative analysis can be enigmatic, something magical and artful" (p. 207).

Lichtman (2013) suggest developing the three Cs when analyzing data: codes, categories, and concepts. To do this, I produced initial coding that summarized the ideas of participants' responses. The initial coding began during the interview process in the form of memos and notes within the columns while transcribing the first round of interviews. These codes included teacher leader responsibilities, empathy for others, beyond the job role, learning new knowledge and skills, and building relationships with teachers and administrators. Upon completion of the interviews and transcripts, I analyzed the documents to create additional codes and began brainstorming initial categories. After the completion of the focus group, I transcribed the group interview and created codes for my interpretation of the data. I ensured that similar topics between the interviews and focus group had the same codes. In my next phase of data analysis, I created a list of all the codes and grouped similar or like codes together. From these groupings, I created category names. During the final phase of data analysis, I reviewed the category names to make connections to concepts related to teacher leadership and transformative learning theory. I call this process "codeweaving". According to Saldana (2009), codeweaving is a practical technique for insuring that you are thinking how the puzzle pieces fit together.

Through the analysis of the data, I looked for themes or concepts. Taylor and Bogdan (1998) stated, "Concepts are abstract ideas generalized from observational, interview, or other data…like concepts, propositions are developed by poring over the data" (p. 144). The list of coding categories served as the vehicle for organizing the construction of themes and concepts. The formation of themes and concepts were used in preparation for interpreting the findings of how former teacher leaders made meaning of their experiences. *Figure 3.2*, illustrates the organizational chart I utilized during the data analysis. The chart is organized by the findings chapters and the codes, categories, and concepts found within those chapters. In addition, the codes from the data analysis that were not part of this dissertation are included. These codes did not occur frequently enough in the analysis or did not fit within the structure of the findings chapters. In the proceeding section, the considerations of subjectivity and reflexivity, and limitations are discussed.

Chapter 4: Challenges the Participants Encountered While in the Role of Teacher Leader

Codes	Categories	Concepts/Themes
• Two World Identity • Coach (athletic coach-like) • Middle Man • Coach • Leader • Neutral Party • LGBTQ Advocate • Supporter • Principal's Pet • Resource • Unclear job responsibilities	Participants Perception of Themselves During Their Time as Teacher Leaders	Identity in the Teacher Leadership Role
• Challenge working with adults • Emotional • Experiencing resistance • Unprepared to work with adults • Out of comfort zone • Providing feedback on instruction • Understanding how adults learn • Building trust with teachers • Building credibility with teachers	Working with Adults Building Relationships Supporting Adult Learning	A Shift from Student to Adult Learning
• Content knowledge • Leadership knowledge/Not seeing self as a leader • Independent learning/development • Pedagogy of specific content • Preparation for role as teacher leader	Confidence Level	Confidence as a Teacher Leader

Chapter 5: Using their Sense of Agency to Grow as Educators

Codes	Categories	Concepts/Themes
• Advanced degree • Career advancement • Leadership knowledge • Preparation for role as teacher leader • Working with adult (teacher) learners	Building Leadership Knowledge and Skills Sense of Agency	Learning to Be a Leader
• Jumping into the role and learn • Building content knowledge and skills • Professional development/training	Building Content Knowledge and Skills Sense of Agency	Learning to Be an Instructional Specialist

Chapter 6: Shaping Who the Participants Are Today as Educators: The Transformative Learning Experience of Teacher Leaders

Codes	Categories	Concepts/Themes
• Empathy for teachers • Learning for teachers • Social awareness • Struggling teachers • Teachers as experts • Teachers need a lot of support Struggling teachers	Supporting Teachers Learning from Other Teachers	New Perception of Teachers
• Learning system • Bigger picture • Vision and mission • Behind the curtain • Understanding other roles in education • Layers and depth of the organization	Systems Thinking	New Understanding of the Education System
• Literacy knowledge • Reading teacher • Building relationships • Supporting teachers • Administrator • Coach • Evaluator/Evaluation process • Organization/systems thinking • Gain confidence	Creating a New Identity	Current Identity as Educators

Codes from the Data Analysis, Not Part of the Findings Chapters

Codes
• Decision making • Work environment • Poor school culture • Mentor

Figure 3.2 A Diagram of Codeweaving

Codeweaving is a practical technique of insuring that you are thinking how the puzzle pieces (codes, categories, and concepts) fit together (Saldana, 2009). This chart is organized by the findings chapters and the codes, categories, and concepts found within those chapters. In addition, the codes from the data analysis that were not part of this dissertation are included. These codes did not occur frequently enough in the analysis or did not fit within the structure of the findings chapters.

Subjectivity and Reflexivity

The Sage Encyclopedia of Qualitative Research (2008), defines *subjectivity* as an individual's feelings, opinions, and preferences. Gubrium and Holstein (2002) adds to that definition by stating that subjectivity is the "[A]gent who stands behind the "facades" of the interview participants… who is held practically and morally responsible for the participants' words and actions" (p. 6). As the researcher, I am intimately involved in shaping the outcomes of this research study. I am aware that my personal and professional background, culture, and place in society influence my understanding and perceptions of this study.

Subjectivity. Interviews and focus groups are understood to be socially and linguistically complex situations in which narratives are co-constructed between the researcher and the participants (Warren, 2002). Interviews and focus groups are a form of discourse between the researcher and the participants (Mishler, 1986). Mishler (1986) stated, "Questioning and answering are ways of speaking that are grounded in and depend on culturally shared and often tacit assumptions about how to express and understand beliefs, experiences, feelings, and intentions" (p. 7). The interview and focus group are both shaped in its construction and meaning through the questions that are asked, the pauses, facial expressions, and other verbal and nonverbal communications that occur between the respective parties (Corbin & Strauss, 2015). Thus, it is critical, as the researcher, to be aware of my relationship to the field of study (Hesse-Biber & Piatelli, 2012). I am subjectively involved with the fieldwork, field relationships, and the findings of the research (Dunbar, Rodriguez, & Parkner, 2001). As the researcher, I selected what to study in my research and how to study it. Thus, I selected a topic of high interest to myself, hence, as I am an educator who is professionally involved with working alongside teacher leaders. After analyzing the literature on teacher leadership, I

selected an area within the concept of teacher leadership, I believed needed more attention and study.

Every researcher has perspectives, biases, and assumptions that they bring to the research process (Bogdan & Biklen, 2007; Corbin & Strauss, 2015). This is not necessarily a bad aspect especially when it comes to choosing the research problem, research questions, or choosing the audience for whom to write (Corbin & Strauss, 2015). Bogdan (1972) articulated, "…to try to understand the social life by standing back and being emotionless in the interest of objectivity and refusing to assume others' roles is to risk the worst form of subjectivism" (p. 45). "It is when it comes to analysis that perspectives, biases, and assumptions can have their greatest impact. The impact comes in the meaning given to data, the concepts used to stand for that meaning, the questions that are asked, and comparisons that are made" (Corbin & Strauss, 1994, p. 46). Indeed, being in the field of education, I want to study problems related to this discipline because this is the area to which I want to contribute.

It is important to my research for me to understand who I am in this process. I identify as a white, middle class, female. I am married and have two daughters. I understand that being a white person has meaning and brings with it the idea of white privilege to this present day. White privilege has influenced systems and systematic decisions such as in the education field since the birth of our nation. The United States has a unique racial history with a strong legacy that lives on today. I continue to learn how this racial history has plagued our nation and caused a disadvantage for non-white people and their societies. I acknowledge the need to work through my own white fragility to comprehend the necessary part I must take to help establish equity in education (Diangelo, 2018). Thus, being aware of my whiteness has helped me to understand

my experiences of emotions, thoughts, and reflections to understand how they influenced this research.

I have twenty-one years of experience in public education. I was an elementary teacher for 10 years of my career. I taught in a large rural school district comprised of about 3,700 students. The building I served included 95% white students, 2% Hispanic, and 2% multiracial. 53% of the student population were economically disadvantaged and 21% are students with disabilities. Currently, I am a practicing district level administrator, holding the title of Director of Staff Services. I am employed in a large suburban school district comprised of about 7,100 students. The student demographics include 6% Asian, 10% black, 6% Hispanic, 6% multiracial, and 71% white. 19% are students with disabilities, 42% are economically disadvantaged, and 3% are English language learners. In my role as Director of Staff Services, I primarily work with teachers and administrators analyzing school/district data and accountability, creating action plans for teacher and student improvement, and oversee all state assessments. Prior to my current position in educational administration, I was a district data coordinator for a regional education center, performing similar job tasks as I currently do. I was also an elementary principal in a small rural school district comprised of 95% white students and a high economically disadvantage rate of about 55%. I am well-versed in the institutional language of education and the discourses surrounding education and educational leadership.

Reflexivity. I understand, there could be drawbacks to my subjectivity. The notion of reflexivity in research is important in avoiding these potential drawbacks. According to Hesse-Biber and Piatelli (2012), for the reflexive researcher, the process of reflection begins prior to entering the field. Hertz (1996) said, "It [reflexivity] permeates every aspect of the research

process challenging us to be more fully conscious of the ideology, culture, and politics of those we study [with] and those whom we select as our audience" (p. 5).

There exists the duality of the insider/outsider phenomenon in my research. I enter this study as an educator familiar with the educational language and discourse. For this, I hold an insider perspective. I use this perspective to my advantage because I am able to understand the discourses surrounding this study and comprehend the participants' interview responses. Due to being an insider, I have access to participants directly or through colleagues. Lastly, being an insider has helped me to formulate the questions that will directly impact my study. However, I approached the research of the participants objectively and with eyes open by not assuming I know what they will say or understand their situations. Moreover, I am an outsider to this research study, as the participants may have different experiences in education than me or who derive their knowledge from unfamiliar ethnic backgrounds from mine.

However, Corbin and Strauss (2012) state,

> It is the multiple aspects of our identity…not necessarily the insider/outsider perspective, that shapes our research experience, and this identity continuously shifts throughout the research process. Researchers are never fully insiders or outsiders. By allowing herself to reflect on and experience the fluidity of her positionality throughout the research process, she was able to gain greater insight about her own biases and assumptions as well as explore the similarities and differences between herself and the community members she encountered (p. 499).

Thus, throughout this research process, I reflected on my positionality and my identity as a researcher examining how this has helped me learn more about myself.

Furthermore, being reflexive throughout the research process, according to Hesse-Biber and Piatelli (2012), helped to shape this study. "Reflexivity can help researchers explore how their theoretical positons and biographies shape what they choose to be studied and the approach to studying it" (p. 496). Moreover, Atkinson and Coffey (2001) in their writing about the relationship between participants and interviewer assert,

> [T]hrough active reflexivity we should recognize that we are part of the social events and processes we observe and help to narrate. To overemphasize our potential to change things artificially swells our own importance. To deny our being "there" misunderstands the inherent qualities of both methods-in terms of documenting and making sense of social worlds of which we are a part (p. 812).

Procedural Understanding

During the interviews and focus group process I took into account how social and historical factors influenced the meaning of questions and how those questions were answered (Dunbar, Rodriguez, & Parkner, 2001). It is important to me as the researcher/interviewer to be attuned to both the lived and procedural complexities of the participants. Being an educator, provided me an advantage to the research of teacher leadership. Additionally, the participants for my study are former teacher leaders, a few of which were participants from my pilot study on teacher leadership. These factors helped to draw out a more in-depth discourse from the participants. Consistent with Dunbar, Rodriguez, and Parkner (2001),

> [I]nterviewers must be deeply familiar with the lives of potential respondents in order to cultivate and activate fully the subjects that figuratively stand behind them. Indeed, one might infer that interviewers need to be "insiders" in order to conduct productive, insightful, nuanced, and revealing interviews (p.290).

Credibility and Trustworthiness of Findings. To accurately record and communication the phenomena of study in this dissertation, well established research methods of qualitative interviewing and focus group were used, which have been successfully used in comparable teacher leadership studies. Prolonged engagement in the field with the participants through interviewing, analyzing, additional rounds of interviewing, more in-depth analysis, and the development of a focus group with questions based on participant insight has assisted in the thorough understanding of the phenomena. Thus, various data collection sessions helped me to expand my thinking and questioning. I consistently asked myself, what is it that I do not know yet about the participants and the topic. To aid in the credibility of the study, member checks relating to the accuracy of the data took place. First round interviews were transcribed and initial coding took place leading to follow-up questions to ask the participants. These initial codes included teacher leader responsibilities, empathy for others, beyond the job role, learning new knowledge and skills, and building relationships with teachers and administrators. Prior to the second round interviews, I reviewed with participants the transcripts to ensure I understood their responses correctly. I shared the initial analysis and coding with the participants to check if they agreed with the analysis. Second round interviews asked participants to expand on responses to questions that seemed vague or confusing. The emphasis was to ensure the participants' words and articulations match what they actually intended (Shenton, 2004). Upon completion of all

rounds of interviews, final transcripts with codes present were shared with the participants to provide one more check for accuracy of the data.

Another verification of the study's credibility was the inclusion of the focus group participants (Jodi, Terri, and Sally) in offering reasons to particular patterns and concepts that were identified through the data analysis and coding process of the individual interview transcriptions. Van Maanen (as cited in Shenton, 2004) expresses the importance of developing this formative understanding, by expressing,

> [A]nalysis and verification…is something one brings forth with them from the field, not something which can be attended to later, after the data is collected. When making sense of field data, one cannot simply accumulate information without regard to what each bit of information represents in terms of its possible contextual meaning (p. 69).

Finally, the findings of this study were compared to existing bodies of knowledge to further illustrate the phenomenon of teacher leadership.

Limitations

My interpretations to the social phenomenon of teacher leaders making sense of their experiences, are limited because of my own personal background and experiences. My experiences as a teacher and leader varied from those of the participants, guiding me to understand their responses in the framework of my own background knowledge. My interpretation of the participants' responses led to additional questions for asking and led to the follow-up interviews, acquiring more time from the participants.

Qualitative interviewing and focus groups are time intensive processes that include identifying a sample group, creating an interview guide, conducting the interviews, and transcribing interviews from audio recordings. The participants were asked to be involved in the study more than once to gain an in-depth understanding of their experiences. Numerous interview sessions required more of the participants' time.

Conclusion

This dissertation study aimed to contribute to the field of education by addressing actual teacher leaders' understandings of their transformation, thus providing additional insight into teacher leadership. The data collecting techniques of semi-structured interviews and focus group were both effective methods to achieve the desired outcomes of the study. Initial data analysis created in-depth thinking and understanding of teacher leadership leading to initial codes and categories. As the study progressed to second round interviews and the focus group, participant involvement helped me to modify the codes, categories, and concepts, hence, enabling me to articulate the findings of this research study on teacher leadership. Thus, chapters 4, 5, and 6 articulate the findings for this study.

Chapter 4: Challenges Encountered as Teacher Leaders

Becoming a teacher leader offered the participants the hope to expand their influence in their schools and districts by helping teachers and students improve. The participants welcomed the opportunity to collaborate with colleagues, learn, and grow as educators. They were excited about this new journey in their career. As Sophia shared,

> I was going to be in education for a long time. I knew I didn't want to ever get to a point where I wasn't going to like doing what I was doing. I liked what I was doing and I thought I wanted to get myself moving forward and to expand that circle of influence.

Other participants shared similar sediments. Scott expressed,

> Your entry point and exit point are the same unless you are willing to become…to be a leader of an organization…I was lucky and had that opportunity in front of me.

Sally saw being a teacher leader as a necessity in education. Sally stated,

> I think of it more as a necessity in education. Being right now in education we need to collaborate as much as possible and we still need someone to steer the work. A principal is so involved in the day to day operations of the building that they can't function so much as that instructional leader as they may like to. So, I feel that we need teachers to take on some of that responsibility…I think for myself as becoming a teacher leader. I look to grow and improve

> as an educator. I reflect often to get better and to improve and I want to be able to inspire my colleagues to do the same.

Even though, the participants were enthusiastic about their role as teacher leaders, they faced some challenges throughout their journey. Using the lens of transformative learning theory to understand this phenomenon, these challenges presented as "disorienting dilemmas" (Mezirow, 1991). These "disorienting dilemmas" provided the participants the opportunity to "make meaning" of their teacher leadership experiences. This chapter examines how the participants made sense of their teacher leadership experiences by sharing three significant challenges they encountered, which were: 1) identity in the teacher leadership role, 2) working with adult learners, and 3) confidence as teacher leaders.

"That is How I Truly See Myself": Identity in the Teacher Leadership Role

Qualitative researchers in education continually ask questions of their participants, to discover how they interpret their experiences and how they structure their social world in which they live (Bogdan & Biklen, 2007). In order to understand how former teacher leaders made sense of their teacher leadership experience, the participants were asked to share how they perceived their identity as an educator during that time. Identity played a role in the participants' transformation from teachers to leaders. The process of becoming a teacher leader is a journey of identity change, development, and re-invention (Mezirow, 1991). To help understand how the participants made meaning of their teacher leadership experience, *Figure 4.1* includes the participants' official teacher leader title and their self-identification as educators during that time.

Participants	Formal Title as Teacher Leader	Participants' Self-Identification during their Time in the Role of Teacher Leaders
Jodi	ELA Instructional Coach	Two World Identity
Terri	ELA Instructional Coach	Coach (Athletic Coach-like)
Sophia	District Wide ELA Instructional Coach K-8	Middle Man, Coach
Sally	District Wide ELA Instructional Coach K-8	Martyr for the Cause
Scott	Mathematics Instructional Coach	Coach, Leader
Justin	District Teacher Evaluation and Instructional Liaison	The APPR Guy, Neutral Party, LGBTQ Advocate
Nicole	Multi-Classroom Leader	Supporter, Principal's Pet
Kelly	Building Instructional Coach	Resource

Figure 4.1 Summary of Participants' Perceived Self-Identification during their Teacher Leadership Experience

Jodi's professional identity shifted when she became a teacher leader. Prior to becoming a teacher leader, Jodi identified as a high school English teacher. Jodi's title as a teacher leader was English language arts (ELA) instructional coach. In the role of a teacher leader, Jodi referred to her identity as "two world identity". According to Jodi,

> It's interesting because I actually saw myself in two worlds. As a teacher leader, you are a teacher but you are also working with administration in the service of whatever the district initiatives are. I saw myself in both those roles.

However, Jodi perceived her teacher leadership identity to be awkward and she had to proceed with caution when asserting it. Jodi communicated,

> I think there is a danger as a teacher leader being too loyal to either side, by being too loyal to teachers or being too loyal to administration because in some ways you are ostracized by both sides. But what you really are as a teacher leader is bridging the gap between both. So your there to try and help administration to move teachers forward in a positive direction but you are also there as the colleague and loyal friend to teachers. It is tricky to balance both I saw myself in both realms.

Jodi thought this "two world identity" was a trait of a teacher leader. The role, as she described, made her "the bridge between both teachers and administration." She worked with administrators ensuring the initiatives were implemented successfully, while helping teachers develop literacy instructional skills. However, Jodi did not feel she belonged to one specific social groups. She did not see herself completely as a teacher or an administrator.

Terri identified as an English as a new language teacher before becoming a teacher leader. During Terri's time as an English language arts (ELA) instructional coach, she perceived her identity to be literally as she stated a "coach". Terri articulated,

> So my title was literally "coach". That is how I truly see myself. As a coach, you watch people in the field. If you are a really good coach, you are adjusting what really worked and what had the most impact on people. When you find those moments of success you can leverage those to find more success with your team. If you think about it as a sports analogy, a coach will find someone's strength and play on that over and over again…You use the strength piece to strengthen what they do well such as classroom management. You focus on the people…a good coach works to help people get better. That's their job.

Terri was clear on her identity as a teacher leader. Terri saw her identity as an educator similar to an athletic coach's role. Athletic coaches instruct and work with their athletes to prepare them for competition. Coaches know and understand the sport well to help athletes perform their best. Terri was a supporter for the teachers by recognizing their strengths and fostering improvement in other pedagogical areas through supportive learning opportunities. Terri understood that recognizing one's strength helped to foster relationships. Terri stated, "Once they see that you are recognizing their strengths they may work with you better or collaborate with you better."

Sophia identified as a special education teacher before becoming a teacher leader. While in the role of an English language arts (ELA) instructional coach, Sophia saw herself as a "middle man". She described this as,

> I felt like a middle man. I was the sounding board and the confidant…both administrators and teachers felt they could talk to me and share information with me freely.

Sophia valued the time spent supporting teachers and administrators and felt she was making an impact. She stated, "Being an instructional specialists allowed me to expand my circle of influence."

However, at times, Sophia felt frustrated and confused in this role, as she stated,

> I was frustrated because we had one teacher leader position that was administrative and the other was not. At times, I could not attend certain meetings that my counterpart could. I did all the same work, but not getting the same respect in my role simply because of how the position was classified.

Sophia's teacher leadership position was not an administrative position. She was not sure why the district classified these positions the way they did, which caused frustration and confusion for Sophia with understanding her identity as an educator.

Prior to becoming a teacher leader, Sally identified as a second grade teacher with a passion for literacy. Sally, as a teacher leader, held the title English language arts (ELA) instructional coach. This was a district-wide role that supported nine elementary buildings and three middle schools. When Sally was asked during the interview to share the way she perceived her identity to be during her time as a teacher leader, there was a long pause and then a sigh. Sally shared,

> I think that I was a martyr for the cause. Honestly, I feel like that. I would die for the cause; I would die for the cause of literacy. I

> was a month into the job and I was falling over my own sword. I was trying to do it all myself and I could not. I think I was going into it with this relentless spirit, we were going to change, we were going to do this. But the "we" was really me. I was taking everyone's questions and doing the research instead of trying to work with people on these questions.

Sally passionately saw herself as a literacy expert and instructor. Sally thought she was admired for her knowledge in literacy and advocated for change in the way literacy was taught in the district. Sally initially thought being a "martyr" was what she had to be in that role. However, after a few months as a teacher leader, her perception of herself changed because she came to realize the job was bigger than she expected. Sally shared,

> I was the jack of all trades master of none. I was putting out a lot of fires. A lot of things people were asking for were things I didn't think an instructional coach should have been doing. Like making copies for teachers. That was the culture at the time. So teachers expected this. I don't want to make your copies I want to help you with student improvement. I just feel like as a district we haven't truly figured out how to manage this role. The teachers in that role take on many responsibilities and aren't always prepared for these.

Sally conveyed that she wanted to see herself as an "instructional coach" but the overwhelming responsibilities of the job role made it difficult to assume that "instructional coach" identity. Sally felt the job was too big because of the size of the district and the large number of people she needed to support in the teacher leader role. The difficulty of Sally identifying as an

"instructional coach" may also be attributed to the way others in the district viewed the position as the culture from what Sally shared saw her more as a helper for teachers instead of a supporter for instructional improvement.

Scott identified as an elementary teacher prior to becoming a teacher leader. Scott's teacher leadership position was titled mathematics instructional coach. Scott agonized to distinguish his identity during this time. Scott stated,

> I struggled with that, even though I knew I was connecting with people and moving the position forward and having an impact with it. I wasn't a teacher anymore, I couldn't identity as that anymore. I felt guilty about that. Like the first day of school, I didn't have any kids. I didn't have a class. So I felt guilty about that. I struggled.

Scott struggled with his identity. He felt guilty leaving his role as a teacher. He knew he could not identify as that anymore. As time went on, Scott gained knowledge and experience working with teachers and administration. Scott transformed as an educator and began to see himself as a leader. Scott said,

> I think I grew and saw myself as a leader and I embraced that role…I began to see that I was in a leadership role and I wasn't a teacher anymore. I was an instructional leader and I worked to own that role. It took some time but I got there.

Scott realized when he started as a teacher leader, it was hard to figure out his identity as an educator. It became arduous, transitioning from seeing himself as a teacher, which was all he known, to seeing himself as a leader.

Transitioning from a teacher to teacher leader was an enormous change for Justin. He had viewed himself as an English language arts teacher supporting the needs of students. In his teacher leadership role, as the district teacher evaluation and instructional liaison, Justin's work was with adults not students. Justin stated,

> My role as the APPR and Instructional Liaison took me out of the classroom as I worked full time to support teachers, thus, I became "The APPR Guy". More importantly, I was in a leadership role in which no one held previously. I worked closely with the union, the teachers, and the district departments. A part of my professional identity that I hold true regardless of the role is to do what's best for our students, which in this case, meant helping to support teachers so they can perform their best for the sake of our students.

In this role, Justin also created an image of himself as the "neutral party" because he was supporting the teachers in their understanding of the evaluation process, while at the same time, supporting administrators with their part of the evaluation process. Justin entered the role of district-wide APPR and instructional liaison during a difficult time in the district. Justin expressed,

> I had taken this job during a rather tumultuous time in our district as the teachers' union had publicly engaged in a "vote of no confidence" towards the then superintendent. I had to constantly market myself as a neutral party. I was still in the teacher's union and a teacher. Some people thought I was a district administrator and still others thought I had taken a job with the state education

> department. It was an adjustment not being in the classroom and the work and the stress still remained, it just looked a little different.

Teachers were skeptical about Justin's involvement in the evaluation process as they did not quite understand his role in supporting them. Hence, the identity of being a neutral party was Justin's way of staying out of the current issues with regards to his opinions and doing the job he was hired to do. Justin's work was driven by the need to help students in his new role the best way he could which was supporting teachers with their instructional practices.

Justin also shared the importance of his cisgender gay male/queer identity and his position as an educator. Justin worked towards inclusion in education since he started as a teacher. He is actively involved in the teachers' union and district LGBTQ committees, advocating for equity and inclusion in education. Justin shared,

> I helped to established the first and only Gay-Straight Alliance (GSA)…I became the DASA representative [for the building Justin worked at] …I also served for several years on the teacher center policy board to help update the district's code of conduct.

His work includes ensuring that curriculum, programs, and textbooks in the district and around the state are inclusive for all students. Through his work as an APPR and instructional liaison, he had provided support to teachers and administrators, ensuring instruction meets the needs of all learners.

Nicole had a difficult time expressing her identity in the role of a multi-classroom leader. She continually stated throughout the interview that she was a passionate English teacher. Her struggle with the teacher leadership identity was apparent when she said,

> I would always tell teachers that I am not an administrator. I would say I am your colleague. I am doing this to help you and make you a better teacher. I also said this is to help make you a better teacher to help students learn. I think some of them saw me as someone who would hire and fire but I wasn't.

Furthermore, Nicole felt that because she worked well with the principal, teachers saw her as someone with authority that would determine their employment status. Nicole said, "Some teachers used to say I was the principal's pet but I was just doing my job." Nicole expressed frustration that teachers thought of her in this manner. She still saw herself as a colleague to teachers and wanted to be a support for them.

Prior to becoming a teacher leader, Kelly identified as an English as a second language teacher. When in the role of instructional coach, Kelly felt challenged to recognize her identity. Kelly stated,

> I was a liaison between teachers and administrators. Honestly, I feel like as an instructional coach and I think we [Kelly and the other instructional coaches in the district] struggled with our professional identity because we weren't administrators and we weren't teachers.

Kelly felt this way because of the reaction she received from teachers in her school. Kelly shared, "We had a list of quality instruction that we should be looking for and working with teachers on…the teachers saw us as spies for the administrators." Kelly felt that teachers did not value her support and thought she was going into their classrooms as a way to provide information to administrators. Kelly wanted teachers to value her support and expertise in

instruction. Kelly had a view of what she hoped would be her identity during this time. Kelly expressed, "I wanted others to see me as a resource. I saw myself as a resource for teachers." Kelly wanted teachers to see her as someone who was there to help them become better teachers.

Discussion of Identity in the Teacher Leadership Role

A person's identity is the way one perceives and represents himself or herself (Hanuscin, Cheng, Rebello, Sinha, & Muslu, 2014). According to Priest and Seemiller (2018), "Professional identities are socially constructed, and legitimized through interactions and participation with students, colleagues, and professional communities" (p. 94). The participants' identities during their time were based on the way they made sense of their teacher leadership experience. Priest and Seemiller (2018) state that becoming a teacher leader is "the negotiation of self-views, others' perceptions or expectations, and the meaning of a teacher leader's role within society" (p. 94). It was difficult for the participants to articulate their identities during this time in their career. Most of them stated that they were not teachers and they were not administrators. In the understanding of the current educational systems, the idea or concept of "teacher as leader" or even "coach" is still not easily recognized.

In the case of the participants, they did not see themselves belonging to a specific group in the educational system. Their relationship with other teachers changed because the participants were not classroom teachers anymore, thus excluding them from that social group. The participants were not administrators either, in which, they were not invited to join that social group. Therefore, the participants did not find themselves belonging to a specific social group within the organization making it unclear to identify as such.

Sinha and Hanuscin (2017), in their work on teacher leader identities, learned that teachers cannot perceive themselves as leaders until they engage in teacher leader practices and

others identify them as such. Weiner and Woulfin (2018) note that if teacher leaders lack opportunities to act as leaders, they may not progress in their role as teacher leaders.

"Working with Adults is a Lot Different": The Shift from Student to Adult Learning

Each of the participants' had a background as a P-12 teacher working with children. They have degrees in education that equipped them with the skills of understanding the development of children and how they learn. When the teacher leaders stepped away from their classrooms, they also stepped away from educating students directly. As teacher leaders, the participants' main role was to support teachers instructional. Prior to this position, many of the participants had limited experience working with their colleagues in this manner. The participants entered their teacher leadership positions under the assumption that adults learn in the same fashion as children and their colleagues would be receptive to their ideas for improvement. However, these assumptions led to challenges for the participants.

During the focus group meeting, the three participants agreed it was easier to work with children than adults (other teachers). They found working with adults in the capacity of providing feedback on instructional practices and implementing new strategies for learners was challenging. Terri stated, "It's harder to get adults to come around." They all concurred, when they began as teacher leaders, the excitement of being in a position to encourage change in their school or district was overwhelming. Sally stated,

> I knew what I wanted to do and I think I had my own vision on where I wanted to bring things. However, I wasn't paying attention to the culture and climate and looking to "see" what they [teachers] were in need of for support. I knew what I wanted,

> instead of asking the teachers, what do you need or how can I help you…. I always say, if I could go back [meaning in time].

The other focus group participants resonated with Sally's statement. They had similar experiences working with adult learners and through critical reflection, the participants recognized that their approach to supporting teachers was not really about helping them but rather, trying to make the participants' vision of education come to fruition. Sally summarized these transformative learning experiences well, by stating,

> I was used to working with these little ones and they would listen to me and I was the most knowledgeable one in that setting. Working with adults is a lot different, a lot different. Their backgrounds, their core beliefs, their perspectives. I wasn't prepared to work with adults, as I was with kids.

Sally shared that she was not prepared to work with adults in the capacity of providing feedback and getting them willing to accept new teaching techniques. In addition to the focus group participants, the other participants in the study had similar experiences understanding how to work with teachers.

Kelly disclosed that she developed a new perspective of teacher leadership while working with other teachers. Prior to being an instruction coach, Kelly was a middle school and high school English as a second language teacher. She was an advocate for English Language Learners (ELL) by working to meet their social and academic needs. As an instructional coach, one of Kelly's goals was to help other teachers understand the backgrounds and needs of ELLs. Kelly stated,

> As a former ENL teacher and working with groups of students who's needs weren't being met, I was an advocate for those students and to help their needs to be met.

Kelly understood the families and student backgrounds of the ELLs by recognizing their diversity and culture. Kelly understood the struggles many of those families faced by moving to a new country. Kelly wanted to have more of an impact in her district and thought sharing her knowledge with other teachers of how students from diverse backgrounds learn, in turn, would help a larger group of students. However, she experienced the opposite of what she had assumed. Kelly disappointedly said,

> This is going to sound horrible. That year as an instructional coach kind of killed it for me. We keep talking about all this PD [professional development], and talking about instruction and changing instruction but no one was doing it. I was very discouraged as an instructional coach. I thought I would have more of an impact with teachers. It kind of left a bad taste in my mouth.

Kelly felt defeated as an educator. She thought teachers would want her help to make improvements. She taught teachers various instructional strategies to use in their classroom that worked for her but when she observed teachers in action, she did not see them using those strategies in their classrooms. Kelly did not understand the reactions she received. Kelly stated,

> They couldn't see past themselves. You need to have a growth mindset as a teacher. We want students to think like that but the

> teachers didn't think like that. They wanted to blame everyone and everything else but themselves for the students not improving.

Having some time to reflect on that experience and using that experience to broaden her own knowledge, she acquired a new perspective of how to work with adult learners. Kelly concluded, "I read a quote that said, 'You can't expect you from other people'. It made perfect sense." Kelly learned that the teachers she worked with did not have the same background as her, therefore, not having teaching experiences similar to an English as a new language teacher. Kelly had to learn what it was like to be a general education teacher in a K-12 setting. She also learned that bringing evidence such as student data reports to meetings and trainings with teachers helped to strengthen her approach to instructional change. Kelly expressed,

> Using data as a talking point with teachers…I feel confident in some of the support I was giving people because the data showed that they needed support.

Kelly learned that using student data as evidence helped her gain leverage with teachers. The student data reports showed the teachers their instruction needed to change to help students make improvements.

On the other hand, Terri saw the challenge working with teachers to be one of the highlights of her teacher leadership experience. Terri was frustrated during early on instructional development meetings she had with small groups of teachers. She would demonstrate and explain new instructional strategies for teachers to use in their classroom. She thought because she had success with those strategies with her students, that all classrooms would as well. During these meetings, teachers gave Terri feedback and she learned that her approach to working with them, unknowingly shut them down. She had made the teachers feel like she did

not respect them as professionals. This situation was emotional for Terri and she was disappointed in herself. Terri stated, "It is not until after, when you reflect on it, you see and that it was awful." She arranged with her administrator to meet with those teachers shortly afterwards to apologized for the way she approached the meeting. She was able to redeliver the instructional strategies in an engaging way to the teachers and included their participation on ways to deliver these strategies in their classrooms. Terri reflected,

> I think a lot of it came when I realized the biases I have and I learned to understand those biases. It's being open to take feedback and using that to move our relationships forward. Relationships are huge. I had no idea! I didn't realize that I was standing in the way of building these relationships at first. It took another teacher to bring you out of that…. It goes back to what you said that if you don't have those moments, those epiphanies, I won't have learned this.

This dilemma enabled Terri to learn the true meaning of being an instructional coach as she shared,

> You focus on the people…. if you are a really good coach…. you use the strength piece to strengthen what they [teachers] do well…. once they see that you are recognizing their strengths they may work with you better or collaborate with you better.

This experience shifted Terri's understanding of how adults learn and ways of encouraging adult growth.

Terri worked in a large multicultural urban district. It was important to Terri that the students' culture be a relevant piece in the curriculum and instruction. She understood that from the trainings she received from the district that culture, diversity, and recognition of students' backgrounds were important to the learning environment in her district. Thus, Terri felt, "The culture here taught me how to be an advocate for students." Terri shared that the school she worked in was concerned to be dangerous or violent. She did not perceive that to be the case. Terri stated,

> The building I was working in may have seem dangerous or violent on paper but the kids were looking out for you. It was like the kids were taking care of me.

Terri worked to help teachers understand these important beliefs and values about her school and district. Terri stated,

> So people who come in to judge those kids, they are failing to see how we handle students here. When I started to understand this, I was helping others to understand their bias. It has helped me to learn how to reach people and help people learn how we could reach our students. It has helped give me a broader perspective.

These experiences working with adults helped Terri to grow in her understanding of culture and community. Through these experiences, Terri became humbler and changed her approach with helping adults learn. Her tone changed and she learned that it's not just what you say but how you say it.

Scott shared that he knew of teachers that were not respectful of instructional coaches. Scott stated,

> There were a lot of people when I came across them in buildings who were resistant to the work of a coach. They didn't respect that position and didn't respect the people in that positon. So how do I fix that.

Scott took a positive approach to understanding his new role by working to shape who he was as a teacher leader. Scott believed the culture in the building he worked in helped him to build relationships with teachers in his role as a mathematics coach. Most teachers were welcoming to Scott and his role to support them. Scott thought that being a male in this position helped with building relationships. Scott said,

> I am sure it worked to my advantage being a male in that building with relationship building and interacting with people. I wasn't seen as much of a threat. I am talking in stereotypes right now. I have seen how females at times treat each other.

Scott believed that his gender had an impact on building relationships with teachers in his building. He thought that being a male aided in developing professional relationships with female teachers. Scott further expressed,

> I worked with somebody who was a coach for a few more years than me and she was doing some formative assessment PD with staff. I said can I help you, I want to learn more. We could present the same thing, she put her personal touches on it and I put mine. I received a better reaction from staff than her. I could use more sense of humor. I could present with more humbleness. I do agree that being a male allowed me to connect with people.

For Scott, being a male in the role of mathematics instructional coach afforded him more respect and less resistance than being a female in that same role.

Discussion of the Shift from Student to Adult Learning

The participants came to a realization that adults learn differently than children. The participants learned adults are not as curious about new ideas and concepts as children. Many of the participants faced resistance from other teachers. The participants discovered that adults learn what they want to learn, what they are interested in, or what they feel would value their work. According to Cranton (2016), adult learning is considered, in most cases, a voluntary event lead by self-motivation and self-direction. Individuals choose to become involved in learning activities because they want to develop personally or as a response to a professional need. The participants recognized their unfamiliarity of being in a position of a change agent when working with other teachers. Most of the participants did not feel equipped with the knowledge or skills to work with adult learners.

The participants were able to critically reflect on their experiences working with teachers to acknowledge the value of building relationships with teachers that led to developing a sense of trust and respect for each other's professionalism. Taylor and Snyder (2012) learned that relationship building is a significant part of the process of transformation. Kroth and Cranton (2014) stated, "Relationships can change during a transformation process, they can provide support, and trusting relationships make it possible to have significant discussions for questioning and building understanding" (p. 96).

"I was not developed and I was not trained for the role": Confidence as a Teacher Leader

Each of the participants came from diverse backgrounds as educators. They are experienced teachers from the areas of elementary, high school English, English as a second

language, and special education. The participants became teacher leaders because they were interested in expanding their impact as an educator. However, they felt unprepared and lacked confidence or self-esteem due to the vagueness of the teacher leadership role.

Sophia became an English language arts instructional coach for grades K-8, after many years as a special education teacher at the elementary level. She was excited about her new role in education, however, in some ways, she felt out of her element stepping into the instructional coach role. Sophia knew she would be supporting teachers in English language arts instruction, but she did not know how to begin this task. Part of the reason Sophia felt this way was because she did not know all the job responsibilities of an instructional coach. Sophia shared,

> I have said in my district, that it would be nice to have a job description so that you can learn about your job responsibilities. Then, I would know what I needed to learn as I went along…...It was a lot of teaching yourself…. I think not many people even go looking into that type of position because they don't know about it and it is so vague. I mean I didn't even have a description for that position. It's not like hay here are your duties. I didn't have that. I would have to ask if I should be at meetings.

Sophia's school district did not have a clear description of her job duties and responsibilities that would have helped her with seeing how to promote instructional change. As a teacher, Sophia knew her role and was a confident teacher. The uncertainty of being a teacher leader caused Sophia to feel insecure, as she shared, "It was different than I expected."

Terri was a middle school ELA instructional coach for four years after her time as an English as a new language teacher. Terri expressed comparable sediments to Sophia by sharing

there were no "standard operating procedures" for literacy coaches in her district. Terri commented,

> There were none of that [standard operating procedures] and I only knew what I had seen from my classroom position from working with other literacy coaches. We had coach academies once a month or every other month but we sort of taught ourselves.

Even though Terri had monthly coach academies, she was at a loss for understanding the job role. Terri found that she had to prepare herself for this role by sharing,

> So I sat down by myself and thought, if I had the opportunity to have the support of a coach, as a teacher myself, what would be some things I would appreciate having. I made a pretty thorough list and tried to decide what was going to have the most impact right away. The value I saw was in visibility and feedback and just being in the classrooms to give me some credibility to coach teachers is what I was trying to do.

Terri's district provided her time once a month or every other month to come together with other coaches for training but she did not feel that was enough to help her learn how to be a coach. Therefore, Terri used her perspective as a teacher to think about areas she would need help in from an instructional coach. That was the basis of how she structured and created logic to her literacy coach position. It was important for Terri to be visible and learn how to provide effective feedback to establish her credibility with teachers.

Sally shared that being an instructional coach in a district-wide position, rather than in one building, was "very daunting and a hard task." She was an elementary teacher prior to

becoming an instructional coach. Sally served as an instructional coach for two years. Sally was familiar with working with a classroom of students but not with a large district-wide group of elementary teachers. Sally expressed in a frustrating manner,

> I was not developed and I was not trained for the role. I interviewed, got the position, and started. There wasn't a training program for me.

Sally did receive help from the other instructional coach in her district as an unofficial mentor, however, the other coach was in a mathematics position not familiar with current literacy concepts. Sally stated,

> She had been an instructional coach for about 15 years. So I was very fortunate year one as she was my teammate. I felt very comfortable working with her. She took me under her wing. However, she was a math instructional coach and I was a literacy coach. She was able to lead me through the work the best she could. I still felt I needed something more formal for my training.

Sally had some support from the other instructional coach in learning her position, however, she longed for direction to help her as the literacy instructional coach. Sally shared,

> So, I had some unofficial training…I felt very directionless to be honest. I felt very ambitious but I wasn't sure how to roll things out…I felt like I failed in some ways.

Throughout the first year, Sally sought help especially from her supervisor. It was not until her second year in the position, she received instructional coach training. Sally shared,

> At that point, it was a little too late. I really wish I had that in year one because I have already decided that the job was too big and I would have been happier going back into a building.

Sally became discouraged by the complexity of her teacher leadership position. She felt unprepared for many of the job responsibilities and did not feel confident in her abilities to be a leader.

Discussion of Confidence as a Teacher Leader

The participants' confidence levels or self-esteem as an educator dwindled due to the lack of preparation and vagueness of the teacher leadership role. Prior to becoming a teacher, one is involved in four years of undergraduate preparation followed by two years of graduate level education. An educator is well equipped when stepping into a teacher role. However, little, if any, preparation time occurred for the participants before becoming teacher leaders. The participants valued the autonomy of their position, although, they desired parameters that would add clarity to their job roles. They yearned for a structural and logical way to perform their jobs that included support from their school or district administrators.

According to Mezirow (1991), transformative learning is a process of examining, questioning, and revisiting perceptions. We expect things to be the way they were before, however, when we critically reflect on our experiences that lead to transformation, it often prompts an awareness of conflicting thoughts and feelings of uncertainty. In the case of the participants, as they journey through the phases of transformative learning, one enters the phases of self-examination of the world with feelings and a critical assessment of epistemic, sociocultural, or psychic assumptions (Mezirow, 1991). Hence, leading to feelings of uncertainty and lower confidence levels.

Conclusion

In this chapter, the participants shared how they encountered challenges during their time as a teacher leader. The participants perceived their identity to be ambiguous during that time. They did not feel they were a teacher or an administrator, therefore, they had a sense of not belonging to a specific social group in the education system. The participants discovered that working with adults as learners was different than working with children. Often times they faced resistance and a lack of respect from teachers. Due to the vagueness of their job roles, the participants felt a lack of confidence in their abilities as teacher leaders. Using the lens of transformative learning, these challenges presented as "disorienting dilemmas" (Mezirow, 1991) for the participants. These dilemmas were experiences that did not fit the participants' expectations of their role as teacher leaders. The dilemmas did not make sense to them or fit into their existing frame of reference, thus, creating a change in their perception. However, the participants did not let these challenges discourage them and they worked to gain control of their teacher leadership positions. In the next findings chapter, I examine the ways in which the participants' use their sense of agency to grow as educators.

Chapter 5: "Jump Right into that Role and Learn": Using their Sense of Agency to Grow as Educators

The teacher leadership experience changed the participants' perception of how they saw themselves within the education system. As conveyed in chapter 4, the participants encountered challenges or "disorienting dilemmas" (Mezirow, 1991) throughout their tenure as teacher leaders. These dilemmas were experiences that challenged the sense of who the participants were as educators. As expressed, this study sought to learn how teacher leaders made sense of their experiences through the lens of transformative learning theory. Kroth and Cranton (2012) understand,

> Transformative learning experiences often begin with a feeling that one has lost control [agency] and that the events of the world are sweeping them up. As one goes through the process individuals begin to reassert themselves into actively taking on and learning new roles until finally integrating into a more realistic view. (p. 99).

This chapter examines how the participants worked to gain control of their teacher leadership experience, therefore, using their sense of agency to grow as educators. Mezirow (1991) asserts that during transformative learning, one experiences meaning making phases to reintegrate into one's life after experiencing a disorienting dilemma(s). Working to gain control of experiences or using sense of agency is one of the meaning making phases of Mezirow's transformative learning theory. The participants critically assessed their current understanding of education and realized the need to expand the idea of how they viewed themselves as educators. They explored

their options of their new roles and relationships. The participants planned a course of action that included acquisition of knowledge and skills related to the challenges or dilemmas confronted. Hence, this chapter examines the ways the participants acquired knowledge and skills by using their sense of agency to grow as teacher leaders. One of the participants, Scott, summarized the sediments of the other participants in regards to gaining knowledge and skills as a way to grow as teacher leaders. Scott stated, "I worked to own that role. It took some time but I got there." Scott shared how he constructed his role,

> You know when you first start off as a teacher and you don't really know what you are doing. That is how I felt at first. I had to work to learn and understand my direction. I had to jump right into that role and learn.

Using their sense of agency, the participants "jump[ed] right into that role and learned." The following sections examine the ways the participants acquired the knowledge and skills to perceive themselves as leaders and specialists in instructional areas.

Learning to Be a Leader

When Sophia started the English language arts instructional coach position, she had two courses completed from an online program for a certificate in advanced study in educational leadership. Sophia thought that learning to be an educational leader would help her gain the knowledge needed to understand her role as an instructional coach. In addition, Sophia's school district received state grant funds that could be used to help teachers develop the knowledge and skills to become teacher leaders. With the support of Sophia's district, she participated in a teacher leadership development program provided by a regional education center. Sophia thought the teacher leadership program closely resembled the educational leadership program

she was already a part of online, therefore, not equipping her to understand her role as a teacher leader better. Sophia said,

> We worked on creating an [educational leadership] vision and mission…. we worked on career ladders and how we could help develop other teachers into leaders. I felt sometimes we were investing time into something that I know wasn't going to happen because the position I was in as an ELA specialist means something different in every single district…We talked about how we can get to this point in our careers [meaning educational leadership/administration].

Sophia was hopeful the teacher leadership program she participated in would prepared her for her role as an instructional coach, however, instead it was more like a preparation program on becoming an educational administrator. Basically, Sophia was engulfed with educational administrative training that helped with her work with teachers, but, unfortunately, this preparation did not prepare her for certain aspects of teacher leadership.

Sophia did attend a week long professional development training that was also part of the grant. Sophia thought this training helped her prepare to be a teacher leader more than the program specifically for teacher leadership development. Sophia expressed,

> I think that time I spent going through the training was huge. That really helped me to understand how to meet people where they are and understand that we all come to the table with different perspectives. Much of the skills were about listening and trying to

> come to understand the other person's perspective.
>
> Communication and building relationships are key.

Sophia's new understanding for teacher leadership occurred when she took courses in educational leadership and the week long professional development training. Sophia articulated, "The skills I learned in both that training and in my coursework have really stayed with me." Sophia believed that these two programs helped her understand her role as a teacher leader better.

Terri recognized she needed to learn more about the education system and develop skills to lead adults. Terri shared,

> I started my CAS [educational leadership degree] when I still was teaching English…I got into my CAS [educational administration degree] because I wanted to understand it all better. So, then the literacy coach was sort of the best job for that.

Terri wanted to understand the education system better and her role as a literacy coach by working towards an advanced degree in educational leadership.

Scott wanted to learn how to work with teachers better to help them make improvements. He felt that advancing his educational leadership knowledge by obtaining an advanced degree was according to Scott, "a logical thing to do." Scott expressed,

> I actually started my CAS [educational leadership degree] when I was still teaching. It was…well, I stopped because it was personal and I couldn't get passed public speaking. I also thought, I would never be able to make that jump. So, I stopped taking classes for about one and a half years. When I got into the coaching world, I

> realized I could communicate with teachers very quickly and I had a deep understanding of math. It sounded like a logical thing to do for my work with teachers.

Jodi worked towards an advanced degree in educational leadership as well. Jodi shared,

> I was still teaching English. I again love taking classes and love going to school. I did not start taking these classes thinking I was going into administration. I just love taking classes. But my kids were really young and my husband was always away with his job and I didn't have any family to help me take care of the kids. So I waited. That was in 2009…I finished my degree when I was a literacy coach in 2014-15.

Jodi thought that working towards a degree in educational leadership would help her understand her role better. Jodi also shared, "There were a lot of coaches going for their CAS." Jodi shared this because she understood that the role a teacher leader required an understanding and application of leadership. Jodi believed that the administration in her district viewed coaches differently by having an educational leadership degree. Jodi stated, "When I began taking those courses, administrators finally began to see me as a teacher leader." For Jodi, taking leadership courses helped her to relate better to the administrators in her district and enabled her to feel more confident about herself. She gained credibility with the administrators in her district.

Since Sally's instructional coach position was a district-wide one, she felt she had a lot to learn and did not feel confident as an educator. Sally said,

> I think this position was very humbling for me. While I went into that position, you don't know what you don't know. I realized

> very quickly there was a lot I needed to learn. Trying to change things at a district level was a lot more challenging than I ever assumed.

These feelings pushed Sally to obtain an advanced degree in educational leadership. Sally believed, "From getting my CAS [educational administration degree] I can see in a very different perspective." For Sally, developing leadership skills taught her to appreciate the expertise of others more. Sally shared,

> I learned from all these people and got to see all the amazing things happening in classrooms. I got to share their ideas to help teachers to make connections with other teachers. I almost felt like I was a match maker for people but for instruction.

As Sally stated, she saw the work that teachers do differently and she was humbled by this experience.

Discussion of Learning to Be a Leader

The participants understood that being in a leadership position required knowledge and skills to be a leader. According to Muhammad and Cruz (2019), "Schools cannot ensure effective school leadership by simply promoting a good teacher to the role" (p. 3). Therefore, in reinforcing their need to understand leadership and how to be a leader, the participants worked towards an advanced graduate degree in educational leadership. The participants did express their educational leadership programs enhanced their understanding of the education field and built their leadership skills. However, for some of the participants their educational leadership programs prepared them more for administrative positions, rather than, how to be teacher leaders. Thus, programs for educational leaders and teacher leaders have a common foundation

in the idea of "leadership" but are distinctly different in the educators' role within the field of education. These two areas in education do not lead to the same end goal. Moody (2019) expressed that teacher leadership is more about, "…attending to *logistical* issues such as pairing coaches with teachers and scheduling coaching sessions; *structural* issues such as the coaching model to be used; and *human capital* issues such as the quality of coaches" (p. 31). The participants would have grown more if they gained further knowledge and skills specific to teacher leadership.

Learning to Be Instructional Specialists

The participants shared that their districts provided extensive professional development for content knowledge and pedagogy specific to support their growth as teacher leaders. Jodi was provided training in English language arts by her district to aid in her understanding of her role as an instructional coach. Jodi shared,

> Even though I wasn't a high school English teacher anymore, I still received training in foundational reading…on understanding the standards, writing curriculum, and applying these to student work…as a literacy coach we has a ton of training. We had coach meetings once a month. When I reflected on my time as a coach we had tremendous amounts of PD [professional development].

Jodi found this knowledge and skills value to the work she did with teachers. Jodi expressed,

> I would use these same techniques when meeting with teachers. Not just in the way I observe teachers' practices but also meeting with teachers to provide them feedback…I helped teachers develop interim assessments and we created spreadsheets to look at their

> student data…I also did PD to help teachers who struggled with understanding the tiers of vocabulary for students.

It was evident by the way Jodi expressed her growth as an educator, that she developed the competence and confidence needed to lead others.

Terri conveyed her district provided a great amount of training in literacy development for coaches. She received training in numerous literacy programs used to support student development. Terri shared, "We were trained in different support systems such as LETRS, Language Live, STAR, and CKLA." Understanding these programs enabled Terri to have in-depth conversations with teachers about literacy. Terri stated,

> At our department meetings, I may do a model lesson or we might talk about best practices or a teacher may present a lesson and we talked about that…I would run professional development and model lessons for teacher.

She was able to help fill in the gaps in their knowledge of these programs. Terri stated,

> I think the impact I had was pretty enormous. The V.P.s in the building my second and third year really tried hard to get me to come to their new buildings.

This made Terri feel valued as a teacher leader and helped to boost her confidence as a literacy coach. During this time, Terri grew as an educator. Her level of understanding, knowledge, and skills expanded, enabling her to develop as a teacher leader.

Scott also received professional development in the area of mathematics. He found this training very valuable to his position as a mathematics coach because it provided a larger insight

into his instructional understanding. He saw a change in his level of understanding for mathematical concepts. Scott expressed,

> My change had been in that instructional understanding. As an elementary teacher, I used to believe that you were a jack of all trades master of none. I don't believe that anymore. You have to be an expert in those areas and instructionally sound to make a difference for students. You have to understand math.

Throughout his time as a teacher leader, Scott developed the confidence to work with teachers and ask them those challenging questions to help improve their instructional practices. Scott stated,

> When I work with teachers, I ask them what kind of thinking are you walking kids through? Do the students understand it and not memorize it? I learned that teaching isn't about following procedures it's about understanding the concepts to help the students learn.

Over the course of his time as a teacher leader, Scott broadened his understanding for mathematics and learned that teachers need to be experts in the content they teach, in order, for students to become successful learners. It seems this new level of understanding assisted Scott in developing a non-negotiable about being an expert in the areas you teach. Scott was able to gain confidence from these experiences, giving him the courage to approach supporting teachers in a new way.

Nicole found the position of being a multi-classroom leader challenging because she was not confident in her abilities to support teachers in lesson planning and modeling lessons of instruction. Nicole expressed,

> The first year was really tough even though we set the parameters it was exhausting because we really didn't know how to do the position.

Nicole shared that she received numerous professional development opportunities from her district to learn how to support teachers better. Nicole stated,

> We had training from the company [agency the district collaborated with for teacher leadership development] and we had to meet once a month for professional development on how to model lessons and provide feedback to teachers. We also Skyped with other districts around the country doing the same things.

Nicole received quite a bit of professional development and training to learn how to develop effective lesson plans and model lessons to support classroom teachers.

As a part of Kelly's role as an instructional coach she led grade level and department meetings with teachers. Kelly wanted to ensure these meetings were productive and meaningful for teachers, therefore she worked to develop the knowledge and skills to lead successful meetings with teachers. Kelly shared,

> As the instructional coach, I helped to facilitate PLCs [professional learning communities] meetings and team meetings. I was involved in the focus district plans. So, PLC training, RTI

> [response to intervention] training, and setting targets training occurred. Luiz Cruz came to our school to help us with PLC work.

Kelly learned how to support teachers by gaining the knowledge and skills to lead these specific type of meetings. Professional learning communities (PLCs) is a method used to foster collaborative learning among teachers. Much of Kelly's work with teachers involved analyzing student data for instructional improvement and student learning. Kelly felt she was able to help teachers during these meetings, as she stated,

> In the PLC meetings, we would analyze student data…I feel confident in the support I was giving people because we were analyzing areas were improvement was needed.

This new learning helped Kelly to grow as an educator and she felt confident in her ability to support teachers.

Sally felt she struggled during her first year as an instructional coach in understanding her role and how to support teachers with instruction in literacy. Sally worked with an administrator in her district to help her receive training. Sally shared,

> So in year two I was very fortunate. Our assistant superintendent found an actual coaching institute through a regional education center and we were able to get coach training. So once a month we would go and get the coach training from them. That is where a lot of the training I had from my literacy degree came to fruition in a more practical sense. They talked about setting up a coaching cycle and how to work with teachers and administrators. They

> really helped bring things full circle and I had that truly moment of what a coach should be.

Sally found this training exactly what she needed to feel successful as a teacher leader, however, it was unfortunate that Sally was not able to gain this knowledge and skills until her second year.

Justin was in a unique teacher leadership position as the Annual Professional Performance Review (APPR) and Instructional Liaison. He was responsible for supporting teachers with the evaluation process which included teacher observations and student performance learning objectives. Justin learned to understand this process beyond his own experience from his perspective as a teacher. Justin expressed,

> I had to move beyond how it impacted me as a secondary ELA teacher and understand how all educators at all levels were impacted.

It was imperative for Justin to wrap his head around all the details including the regulations from the state education department and his district plan for annual professional performance review. Justin shared,

> I studied the APPR and was a part of the committee to develop some guidance around what it would look like for our teachers. This involved a lot of reading of guidance documents and paying attention to the political landscape in which this was coming from. Included in this process was being a part of discussions on the state level with the union and the state education department in terms of the rollout of APPR…I had worked with most every teacher type in our district, which really helped me to have a better

> understanding of all their roles, responsibilities, and status as related to APPR.

Justin gained the knowledge and understanding of the APPR process and regulations by immersing himself in the policies, procedures, and politics around the evaluation process. Justin shared,

> This opportunity also had me working closely with building administration, district level administration, the state education department, and the teachers' union. Because APPR was new, I also took a variety of guidance documents and helped create and update an APPR manual that was used widely by the district and became a model for other districts to use as well.

By taking ownership for his own learning, Justin was able to support teachers and his district in numerous ways.

Discussion of Learning to Be Instructional Specialists

By using their sense of agency the participants acquired subject specific knowledge and skills enabling them to grow as educators. According to Mezirow (1991), individuals experience transformative learning when they are active members in their own learning about themselves and their world around them. Using one's sense of agency is part of Mezirow's (1991) phases of transformative learning. The participants acquired the knowledge and skills by support from their districts. The participants received training and/or professional development over the course of their tenure as teacher leaders in areas such as literacy, mathematics, teacher evaluation, and instructional practices. Some of the participants, such as Sally, requested training and/or professional development from her school district to enable her to perform her

job roles. Other participants conducted their own research, such as Justin, to understand their role better. Having in-depth knowledge of the subject content, not only helped the teacher leaders gain confidence in themselves, it increased their credibility with teachers and led to better ways of supporting teachers' practices. In the phases of transformative learning, Mezirow (1991) asserts that taking action for one's transformation involves an acquisition of knowledge and skills. Gaining new knowledge and skills builds one's competence and self-confidence in new roles and with new relationships (Mezirow, 1991).

Conclusion

This chapter examined the ways teacher leaders made sense of their teacher leadership experiences through the lens of transformative learning theory, specifically, Mezirow's (1991) phases of transformative learning. The participants explored their new roles and relationships by taking action to gain control of their experiences. The role of a teacher leader is to lead and support other teachers. The participants knew they needed to develop the knowledge and skills to be leaders. Therefore, the participants engaged in educational leadership programs. These programs helped the participants understand how to be an educational leader and how to support other educators. However, a few participants shared they would have benefitted from a program specific to teacher leadership and the work they were doing with teachers in their schools/districts.

The participants expanded their knowledge and skills of the content specific to their roles such as literacy, mathematics, teacher evaluation, and instructional practices. The participants received training and/or professional development throughout their tenure as teacher leaders. The participants used the knowledge and skills gained to support teachers and to help teachers make improvements in their instructional practices. Hence, the participants used their sense of

agency to build competence and confidence in their role as teacher leaders, therefore, growing as educators. The next chapter examines how the transformative learning experience of teacher leadership shaped who the participants are today as educators.

Chapter 6: Shaping Who the Participants Are Today as Educators: The Transformative Learning Experience of Teacher Leadership

Transformative learning is learning that occurs when an adult engages in activities that cause them to see a different worldview from their own. According to Mezirow (1978, 1991), transformative learning is a rational, cognitive process of critical reflection and perspective change. When engaging in this learning process, the learner experiences, "a conscious recognition of the difference between an old viewpoint and the new one and makes a decision to appropriate the newer perspective as being of more value" (Mezirow, 1978, p. 105). Mezirow (1991) proposes that an individual who experiences transformative learning shifts away from narrow, problematic, fixed, or static perspectives towards more inclusive, discriminating, and integrative perspectives. The journey of teacher leadership was a transformative learning experience for the participants as expressed in the two prior findings chapters. This chapter continues to expand on the findings of this research study and the ways former teacher leaders make sense of their teacher leadership experience through the lens of transformative learning theory. First, this chapter examines two perspective transformations the participants encountered: 1) new perceptions of teachers and 2) new understandings of the education system. The second part of this chapter, examines how the teacher leadership experience shaped who the participants are today as educators.

"I was Amazed at What I Saw": New Perception of Teachers

The participants began their role as teacher leaders with perceived ideas of how teachers function within their classrooms. The participants based their ideas of what a high quality teacher looks like on how they performed as a teacher, knowledge on good teaching practices

from professional development, and from their districts' teacher evaluation rubrics. As stated in chapter five, the participants received training and/or professional development related to content knowledge and researched-based instructional strategies over the span of their time in that role. Therefore, the participants grew to become well-informed in these areas enabling them to identify quality instructional practices. A number of the participants were taken back by what they witnessed from the performance of educators in the classroom.

Going into her role as a multi-classroom leader, Nicole believed,

> All the teachers were in their classrooms doing their job and doing it well. I remember I had such a spirited conversation with the math teacher I worked with that stated he doesn't think teachers here are doing a good job. I would say, how could you say that. Our teachers are wonderful and know their content.

Nicole thought all teachers were highly qualified educators. However, after spending some time with teachers in their classroom and observing their practices, Nicole expressed,

> OMG…teachers need a lot of support. I didn't realize that until then. I think they really needed a lot of support because they really didn't know what or how to do things.

Nicole realized teachers needed help with instruction. Nicole further stated,

> No one wakes up each day and says, how can I be the suckiest teacher today. They don't know they need help…I learned that most teachers think they are good.

This was an eye opening experience for Nicole. She was shocked to see that all teachers were not outstanding. She saw teacher practices that were not as effective as she thought based

on her knowledge of pedagogy and by analyzing the student data she collected. Nicole's perception of teachers changed as she had these experiences. Nicole shared,

> I would have gone down in flames defending teachers and then once I was a MCL [multi-classroom leader] …. oh dear the things I saw. It was depressing.

Throughout her time as a teacher leader, Nicole seemed to have learned that teachers need help getting better. She learned that teachers are coming to school to do their best and they think they are performing their best. Nicole understood it was her job to support these teachers with their practice and to help teachers make improvements in their teaching. She grew to understand what she felt was the purpose of her role as a teacher leader.

Scott experienced a similar learning experience as Nicole. He also thought teachers were well prepared and highly qualified to instruct students. He disclosed,

> I saw a lot of teachers struggling. I was taken back on how many people just didn't have any purpose to what they were doing. I was amazed at what I saw.

Scott was surprised by how many teachers struggled with instructional practices. Scott reflected critically on this experience and expressed,

> At some point, I realized from being in the middle I would think that a building administrator doesn't see that and all these people were getting glowing evaluations…all the evaluations that I got- they were meaningless.

This was an awakening experience for Scott that had deep roots into how he saw himself and his abilities as a teacher. He was clearly taken back by the lack of respect he was given from his

administrators on his evaluations. This experience led Scott to examine his own practices as a teacher and his qualifications for being a teacher leader.

Over time, Scott realized how important his instructional coach role was, as he stated, "in trying to fill the gaps" for teachers. Scott stated,

> A building administrator is supposed to be the instructional leader but they have ten million other things going on, they can't and just because you had your CAS [certificate of advanced study] didn't mean they actually knew quality instruction. That disconnect opened my eyes.

This experience was transformative for Scott and changed his perspective about what happens behind closed classroom doors. He did not know there was such a need for continuous support for teachers. He showed a tone of disappointment towards the administration in his building because he felt they were not doing enough to support the needs of teachers.

Justin also believed the teachers he worked with were competent instructors. Justin expressed,

> I was apparently stuck in my own little bubble [referring to when he was a teacher in the classroom] where I assumed others operated in a similar fashion.

During Justin's initial experiences as a teacher leader he learned,

> Taking on that leadership role, I soon realized that is not the case and that there are, in fact, people who need a lot of support and guidance to be better teachers and this was true for newer and seasoned staff.

These experiences changed Justin's beliefs and perspectives about other educators and his role as a teacher leader. Justin's teacher leadership position was directly related to supporting teachers to improve their instructional practices, hence, improving their annual professional performance review. Experiencing how so many teachers were in need of support as instructors, made his work as a teacher leader more challenging, yet, more meaningful at the same time. Justin's goal was to help students be successful by helping teachers improve their instruction.

Sally's experiences with teachers were quite different than Nicole, Scott and Justin. Sally entered her instructional coach position from the perspective that she was performing so well as a teacher, her district needed her to help teach others how to perform as well in their classrooms. However, when Sally started visiting classrooms to observe teachers, she became aware of new instructional methods unfamiliar to her. During the focus group interview, Sally shared,

> I guess I had some teacher envy. It was kind of humbling. I would say there are so many other great candidates out there, how did I get this role? It was good to see all those great things happening in those classrooms.

The other participants in the focus group, Terri and Jodi agreed with Sally. They assumed their subject expertise was beyond the knowledge of other teachers and their role was to be the provider with the instructional answers and techniques. They were prepared to enter into teachers' classrooms to develop lesson plans together and co-teach to help them improve. They all agreed their teacher leadership role opened classroom doors for them to enter and learn from other teachers in their schools. Their perspective of the teacher leadership role changed from this new awareness. Terri and Jodi felt that a number of teachers were effective educators in their

schools, however, many needed support with instructional practices and content knowledge. Sally, on the other hand, worked to engage teachers in building a collaborative community of educators. Sally explained,

> Yeah, I could go in and model a lesson but I think it would be more meaningful if you could go see another teacher. Go see one of your colleagues do it first-hand. That was amazing for me to see all these things. We have a lot of great things happening here and we don't always get to see this because you can get lost in your own classroom.

Sally empathized with teachers and became conscious about her ability in her position to make cultural changes in the district. Her idea of an instructional coach shifted. She stated,

> We can't be competitive and hiding these great tricks and tips. We should be sharing them, right, share your gifts. So, I really tried to break down walls between buildings.

Sally saw her role, as a teacher leader, to build collaboration between the schools in her district by facilitating visits to one another's classrooms and by creating a platform for teachers to share their best practices.

Discussion of New Perception of Teachers

The participants' idea of their teacher leadership role shifted as they witnessed teachers educating students in classrooms. Their assumptions of the degree to which teachers needed support with instruction changed after seeing first hand, teachers' performance in classrooms. In many cases, teachers needed a large amount of support from the teacher leaders in the areas of instructional practices and content knowledge. In other cases, the teacher leaders thought

they were the experts to provide skills and knowledge to the teachers, however, they saw well developed lessons and instruction that expanded their understanding.

In Mezirow's (1991) transformative learning theory, he explains that meaning structures (perspectives and schemes) are major components of the theory. Meaning structures are defined as broad sets of predispositions resulting from psycho-cultural assumptions which determine the horizons of our expectations (Mezirow, 1991). Meaning structures are understood through critical reflection. Mezirow (1991) states that through critical reflection, one critiques their assumptions to determine whether the belief, often acquired through cultural assimilation, remains functional for us in our current situations. Based on their experiences and role supporting teachers' instructional growth, the participants critically reflected on their assumptions and perceptions, altering their viewpoints of teachers' competence as instructors. As the participants developed new perceptions of the practices of teachers, they viewed their own role in assisting teachers differently by understanding that some teachers need more support than others, while other teachers are role models and resources to the organization.

"My World Opened Up": New Understanding of the Education System

The education system is also known as a learning system. Senge (1990) defines a *learning system* as a group of people working together collectively to enhance their capacities to create results they really care about. Senge (1990) states that people are agents, able to act upon the structures and systems of which they are a part. Education systems are complex systems but often times, as educators, we see the parts of the organization, rather than, seeing the whole. Senge (1990) states we often fail to see the organization as a dynamic process. Thus, a better appreciation of the system will lead to more appropriate actions to create a better learning

system. During their time as teacher leaders, the participants moved beyond their four classroom walls, expanding their knowledge and understanding of the education system they worked in.

For Scott, being in an instructional coach position, within a large urban school district, opened his eyes to seeing how the organizational system functions. Scott expressed,

> It really helped to give me a bigger picture of how the organization really works. When you are an instructional coach, you have time to think about how systems can improve. I had systems in my mind consistently.

Scott's perception of the education system changed when he stepped away from the classroom and into the role of a teacher leader. It was interesting to learn that Scott was also reflecting on ways to change or improve the system. This new understand developed from the experience he gained in the role of instructional coach. Scott stated,

> The knowledge I was able to acquire in that position allowed me to talk about areas I couldn't before with instruction. When I was in the classroom, I couldn't see these things but when I was in the role of instructional coach, I began to understand the organization and the systems.

As Scott's knowledge and understanding of the organization system grew, he realized the importance of a clear organization vision and mission. Scott said,

> I very quickly realized that any organization needed to have a clear direction and approach and you needed all people working in the same direction.

Scott came to this perspective by "witnessing the strength of politics in the district and how it can pull the district in many different directions." He had a new understanding for the education system and the importance of all the parts working together for success of the organization.

Justin also came to a new understanding of the education system from his experience as a teacher leader. Justin compared his understanding of the education system to a theatrical event, whereas, "One knows what is happening on the stage but can't see what is behind the curtain." In Justin's role as a teacher leader, Justin was able to see the "behind the scenes" pieces that he could not see before in his role as a teacher. Justin expressed,

> Perhaps most importantly, I was able to see that the district officials seemed to do their best to choose options that would best support teachers, which countered what many teachers' felt.

Justin was able to explain to teachers the reasons behind many of the questions they had about decisions the district made about evaluations because of his work at the district level. Justin learned to understand the evaluation system from the district/administrators' viewpoint, the teachers' viewpoint, and the state's viewpoint. Justin's level of support for teachers, administrators, and the teachers' union grew because of his new perspective of the system.

In Jodi's role as an instructional coach, she worked quite a bit with district level administrators and began to understand their role within the system. Jodi responded,

> I started off as a teacher for years and you are in your own little silo. Then, as a teacher leader and working in the district office, you get a better sense of the organizational structure. You are meeting people and understanding what they do.

Jodi expressed that she was in her own silo, meaning her work, thus far, had been limited to her classroom of high school students. She had not been exposed to the operations of the district office. She learned about the roles of various positions in supporting the functioning of the district while in her teacher leadership position. Jodi also shared "You get to learn fast who is good at what they are doing." Prior to this time, Jodi's understanding was that if you were in a district administrative role, you had a high level of knowledge and expertise. When she developed an understanding of these administrators, she started to see differently. Jodi learned that other instructional coaches and she also carried much of that same knowledge. This new understanding helped Jodi feel competent and confident in her role.

Sally learned that teachers were not the only people in a school helping students learn. She was stunned by the layers and depth of the organizational structure. Sally expressed,

> When I started to work at the district office, wow, my mind was blown. I didn't realize how many people worked there. I didn't know there was all those roles….my world opened up. I started to gain an understanding and all the different roles that come into play to help students come to school to learn. I gained a lot of perspective. What we have a painter in the district? An electrician? Wow!

Sally developed this sense of a larger community helping all students to learn. She did not make those connections until she was a teacher leader. Sally stated,

> When I was a classroom teacher, I felt like I was a big fish in a little pond but when I worked at the district level as an instructional coach, I felt like a very little fish in a very big pond.

As a teacher, Sally was focused on the students in front of her not realizing there were more people helping to make the organization a safe learning environment for students. This experience became very humbling to her and opened her minded to another perspective of education, one as a larger learning community.

Sophia's understanding of the education system changed during her teacher leadership experience. Sophia shared,

> I began to see education as more of a business. As a teacher, we are so focused on the students in front of us that we do not always see the big picture. I felt like I had a much better view of how things really were and how all the moving pieces worked together. There is so much that we do not know about as teachers.

Sophia's new educational system perspective was dramatically different than the one she experienced when she was a classroom teacher. Her focus was on the students and learning at that time. As a teacher leader, it was interesting that Sophia viewed the education system to be business-like. She saw the various pieces of the organization and how those pieces work together.

Discussion of New Understanding of the Education System

The teacher leadership experience, broadened the participants understanding of the organization and how it is a structured learning system that includes layers of support for student learning. They learned that the educational system is built of interrelated parts that work together to create an organization. For some participants, they became aware of parts of the organization they did not know existed. Using the lens of Mezirow's (1991) transformative learning phases, the participants build competence or a broader understanding of the education

system. The participants developed an understanding for what Senge (1990) calls "systems thinking". The participants' perception of the education system changed throughout their time as teacher leaders which enabled them to develop a deeper understanding for the system. Their levels of understanding for the complexities of the organization shifted. For some, they were able to become critically reflective of the organization developing ideas of how to make the organization more productive. According to Mezirow (1991),

> Through reflection, we see through the habitual way that we have interpreted the experience of everyday life in order to reassess rationally implicit claim of validity made by a previously unquestioned meaning scheme or perspective (p. 102).

Thus, the participants were able to reflect on their assumptions of the education system to develop a larger and more inclusive view of the system. The next section examines how the teacher leadership experience helped to shape who the participants are today as educators.

Current Identity as Educators

Turner, Oakes, Haslam and McGarty (1992) state, when a person categorizes or views their identity, it is a social process and relative to a frame of reference. Identity of self is a relationship between the self and the social context. According to Turner, Oakes, Haslam, and McGarty (1992)

> In one sense, the self may be regarded as the psychological vehicle by which the collective shapes the cognitive functioning of the individual in terms of his or her changing social relationship and group membership (p. 2).

As indicated, it was challenging for the participants to develop an identity as a teacher leader. They actively used their sense of agency as educators to build their content and leadership capacity. The teacher leadership experience awakened them to new perspectives of education, thus, transforming them as educators. Taking into account, the participants are former teacher leaders is an indicator they grew as educators and were equipped to climb the career ladder in education. Therefore, it is important to this study to learn how the participants' teacher leadership experiences contributed to who they are today as educators. *Figure 6.1* illustrates the participants' current identity as educators.

After her teacher leadership experience, Sally went back into an elementary building, in the position of a reading teacher. This was a new position for Sally, however, she developed a wealth of literacy knowledge during her time as a teacher leader. She knew the expectations of a reading teacher before starting the role. Sally used the knowledge she gained from her teacher leadership experience by applying it to the way she approached her role as a reading teacher. She expressed,

> Going to that school was like hitting the reset button for me. It really was. I am so thankful for that experience [teacher leadership]. I have a wonderful relationship with the building principal…. When I first went in I did a lot of listening…. When I started to gain the trust of my colleagues, I started to make suggestions and share ideas. I learned the value of collaboration, talking with your colleagues, and the importance of feedback and again, you can't do it all on your own.

Sally felt she had an opportunity to start over as an educator in the reading teacher position. For her, it was "like hitting the reset button". This was her chance to take what she learned from her teacher leadership experience, including those experiences that she wished she could redo and present herself in a new way. Although Sally was working towards an advanced degree in educational administration, she was passionate about literacy and wanted to work in the capacity of helping students and teachers improve their literacy knowledge and skills. Therefore, she took a position as a reading teacher. Sally's teacher leadership experience helped her to realize the professional identity she desired. She was certain that she wanted her professional identity to be a reading teacher.

For a short time, Terri transitioned into an administrator role of data coordinator (occurred during the time of the first and second interview). She helped out various local school districts in the area with student data analysis, school accountability and assessment development. Terri transitioned to a high school associate principal position soon after (occurred during the third interview). Terri recognized her time as a teacher leader prepared her for her current position. Terri shared,

> I think a lot of what I was doing as a coach has spilled over into this role. But, I think it is because those are my strengths and I continue to use those after being a teacher leader.

Terri knew that pieces of her learning as a teacher leader became strengths for her that she was able to carry into her new position.

Even though Terri was now an educational administrator and understood that her official title was such, she still identified as a coach. Terri stated,

> That is how I truly see myself [as a coach]. It's not about checking off things as my duty. It's still about teaching teachers to do great things to help kids do great things…. A good coach works to help people get better.

She valued being a support to teachers helping them to get better at their craft.

Jodi became an assistant principal in a different district after her teacher leadership experience. Her identity became one of an administrator, specifically to Jodi, a principal. Jodi shared during the focus group conversation, being a teacher leader helped prepare her for her role as a principal. She spoke of one example of how that experience prepared her to be a principal by exclaiming,

> I think I am a much better evaluator of teaching from that experience. If I went from being a teacher to an administrator and not having that teacher leader experience, I wouldn't have been able to give people the type of feedback I am able to provide today…. I am able to provide so much more depth to my feedback. I had just taken that for granted and I think, oh my gosh, I can really provide valuable feedback here. I couldn't have done that if I have not been in so many different classrooms during that time.

Jodi is a confident administrator today because the experiences as a teacher leader prepared her for this current role in education.

Scott served in several roles after being a teacher leader. First, he completed his administrative internship for his educational administrator degree in the district where he was a teacher leader. Second, Scott became a data coordinator for a short period of time before moving

on to a middle school principal in the same district. Scott identified himself as a principal. Scott felt being a teacher leader prepared him for those various roles. Scott shared,

> It really helped to give me a bigger picture of how the organization really works. Also, that instructional piece, because I have been working with teachers providing them feedback, so it wasn't difficult when I had to really start evaluating teachers and providing them feedback. I understood those relationships…. I got to learn so much in that role that I feel comfortable talking to teachers about their instruction and approach.

Being a teacher leader taught Scott the importance of building relationships with other educators. Scott learned how to work with teachers by providing them support on their instructional practices. He gained confidence in evaluating teachers and providing them feedback.

Sophia decided to leave her position as a teacher leader because she wanted to continue to expand her "circle of influence". She wanted to have a larger impact on teachers and students. Sophia entered into administration as a data coordinator. In this position, Sophia saw herself as an administrator. She sees this role as one similar to her teacher leadership position. Sophia shared,

> Many of the responsibilities I had were the same. I was running PLCs providing PD and trying to understand what the teachers or administrators needed. My job was to help them to meet their goals.

Sophia continues to work with teachers providing them professional development on instructional strategies. She facilitates professional learning community meetings helping teachers to discuss student data and how to provide support to at-risk students.

Justin has remained in the same district as an administrator after Justin's teacher leadership experience. Justin shared,

> Upon finishing my CAS there was a position available in the district. I originally wasn't expecting to move into administration that quickly, but I figure I had nothing to lose…I applied and was hired as the district coordinator.

Being a teacher leader, prepared Justin for that role, as Justin expressed,

> I was already doing a lot of that work, just from the "other side" [meaning as a teacher]. Now, however, I was one of the district leaders they were meeting with. I continued to support APPR and took on a lot of additional responsibilities. I also had a relationship with many of the stakeholders already established, which helped with my transition into my role as an administrator.

Justin identified as an administrator, more specifically, a data coordinator. Justin's teacher leadership experience directly prepared him for his current positon as he holds many of the same job responsibilities. Justin did share that being an administrator means taking on more responsibilities, in which, he felt prepared for because of his teacher leadership experience.

Nicole is currently involved in her administrative internship for her educational administration graduate degree. Nicole is able to use many of the knowledge and skills she learned during her time as a teacher leader while an administrative intern. Nicole stated,

> It [teacher leadership experience] helped me with the evaluation process because I understand the process better and the expectations for teachers. I think having those difficult conversations during my time as a MCL has helped me prepare for this [internship]. I learned how to be more positive with people and how to work with adults.

Nicole learned how to conduct evaluations more thoroughly with teachers and how to provide them effective feedback. She has learned that she may have been too "abrasive", as she stated, with teachers and has learned how to be more of a positive influence. Nicole still is exploring her identity because she is in a temporary position finishing her degree by completing her internship. At this point, she is not sure if she will return to the classroom as a teacher or seek an administrative position.

Kelly, as a number of other participants, became a data coordinator after her teacher leadership experience. During her time as a teacher leader, Kelly was working with teachers helping to support their instructional practices. She also was coordinating meetings with teachers to review student data and helping teachers create action plans on instructional improvements. Having this experience as a teacher leader, helped Kelly obtain her current position. Kelly shared,

> I learned a lot about how to work towards school improvement and using data in your decision making process.

Kelly identifies as an administrator who values working with teachers to help improve their instruction.

Participants	Official Title as Teacher Leader	Self-Identification as a Teacher Leader	Current Perceived Identity as Educators
Sally	District-wide ELA Instructional Specialist	Martyr for the Cause	Reading Teacher
Terri	ELA Instructional Coach	Coach (Athletic Coach-Like)	District Data Coordinator "Coach" High School Associate Principal
Jodi	ELA Instructional Coach	Two World Identity	Assistant Principal Middle School
Scott	Mathematics/STEM/Formative Assessment Instructional Coach	Coach	Assistant Principal Middle School
Sophia	ELA Instructional	Middle Man, Coach	District Data Coordinator
Justin	District Annual Professional Performance Review and Instructional Liaison	Neutral Party, LGBTQ Advocate	District Data Coordinator
Nicole	Multi-Classroom Leader	Supporter	Administrative Intern
Kelly	Building Instructional Coach	Resource	District Data Coordinator

Figure 6.1 Participants' Current Perceived Identity as Educators

Discussion of Current Identity as Educators

In a recent study on transformative learning theory and identity, Illeris (2012), notes, "Modern sociology has focused on the identity as the instance through which the development of society influences individual understandings, reactions, and way of life" (p. 152). According to Illeris (2012),

> Thus, identity has the nature of a "reflexive project," implying a constant necessity to change [transform] in order to maintain the feeling of being oneself, a balance between stability and flexibility, and between being oneself and changing oneself (p. 155).

For the participants, their teacher leadership experiences helped prepare them for their current positions in education. Most the participants became educational administrators, with a few, entering the role of a data coordinator. A reintegration into one's life on the basis of conditions dictated by one's new perspective, hence, engaging in one's new identity, is the final phase of Mezirow's (1991) transformative learning theory. Thus, the opportunity of being teacher leaders transformed the participants' beliefs, values, assumptions, and perceptions of education; and their idea of who they are as educators.

Conclusion

Freire (1970) conveyed,

> Knowledge emerges only through invention and re-invention, through the restless, impatient, continuing, hopeful inquiry human beings pursue in the world, with the world, and with each other. No one is born fully-formed: it is through self-experience in the world that we become what we are.

As expressed throughout numerous chapters, transformative learning occurs when one's values, beliefs, and assumptions, hence, one's meaning systems, are found to be inadequate "in accommodating some life experience" (Merriam, 2004, p. 61). Through transformative learning, meaning systems become replaced with new perspectives and as Mezirow (2000) stated, ones that are "more inclusive, discriminating, open, emotionally capable of change, and reflective" (p. 7). It can be concluded that the participants' teacher leadership experience, transformed their perceptions of content, leadership, and the educational system. These transformative learning experiences helped to shape who the participants are today as educators.

Looking at the past must only be a means of understanding
more clearly what and who you are so
you can more wisely build the future (Freire, 1970).

Chapter 7: Conclusion: Discussion, Implications, and Recommendations

My Personal Journey

This dissertation started with a personal story that led me to this research. I shared a narrative about a close friend who had the opportunity to become a teacher leader in the school, in which, she served as a middle school English teacher. My friend's role as a teacher leader drove me to self-reflect on my own experiences as an educator. Similar to my friend, I wanted to have more of an impact as an educator, thus, leading me to become an educational leader. It was quite a transformative experience going from being a teacher to becoming a leader, similar to the experiences of the participants, going from teachers to teacher leaders. The findings from this study resonated with me as I endured many of the same transformative experiences that the participants had endured. I learned to be an educational leader by gaining knowledge and skills through coursework and experiences. The participants learned how to become teacher leaders by gaining knowledge and skills through coursework and experience. The coursework gave me the knowledge and skills to understand educational leadership, hence, providing me the informational learning needed. My first leadership experiences, provided me the ability to use the knowledge and skills learned through coursework to put into practice. I experienced feelings of uncertainty and a lack of direction as I tried to navigate my way to understanding adults, parents, students, and the organizational system in new unfamiliar ways. The participants had the same feelings of uncertainty and a lack of direction as teacher leaders. I continued to build my knowledge and skills to apply them to these unfamiliar situations. I built relationships with

teachers, parents, students, and other administrators. I learned that building relationships, trust, and gaining credibility was not an easy task. The participants also worked to develop relationships with teachers and administrators helping to build their credibility as a leader. Finally, similar to the participants, this was the time I was trying to understand who I am as an educational leader. What were my beliefs, values, and how have my perceptions about education changed? How have I transformed as an educator and a person? What is my new professional identity? Throughout this journey, in which I continue, I find myself to be a very different educator than I was at the time when I was a teacher. Don't get me wrong, I still value many pieces of who I was and still am as an educator. But I have transform and developed viewpoints, that are more inclusive, discriminating, and reflective. I have a more sophisticated view of the education field. As I have used my sense of agency to develop my craft, thus, increasing my competence and my confidence. Most of all, I have developed reflective practices, enabling me to looked to my past as a guide to understanding my present and to use my present as a way to provide me hope for my future. I have learned through the findings of this study, the participants were guided by their past to comprehend the present and to provide confidence in their future endeavors.

Summary of Key Findings

This section summarizes the key findings analyzed in the data chapters. In this dissertation, I explored how former teacher leaders made sense of their teacher leadership experience, leading to a transformation of their beliefs, values, and perspectives of education. Each data chapter discussed findings related to the research question that guided my inquiry: *How have former teacher leaders made sense of their experiences after leaving that role?*

The findings of this study have addressed a gap in the research on teacher leadership. As a result, this research has expanded the understanding of how teacher leaders make sense of their experiences and transformation as an educator. Moreover, the findings from this research refined my thinking of the phenomena and supported my proposal a Theory of Teacher Leadership Transformation. This theory is expressed in the following sections and illustrated in *Figure 7.1*. This theory is organized in three phases of teacher leadership development leading to a transformation as an educator. These phases include challenges encountered in the teacher leader role, using sense of agency to grow as educators, and transformative learning experiences of teacher leadership shaping who one is today as an educator.

Challenges Encountered in the Teacher Leadership Role

Becoming a teacher leader is more than acquiring new knowledge, it is the negotiation of self-views, other's perceptions or expectations, and the meaning of a teacher leader's role within the school or district environment (Priest & Seemiller, 2018). Thus, understanding how the participants identified themselves, plays an important role in their transformation as educators. Prior to their teacher leadership experience, the participants identified as teachers. Specifically, the participants shared that they were English language arts teachers, English as a second language teachers, elementary teachers, and a special education teacher. The participants struggled to communicate their identity as teacher leaders. Most of the participants stated they were not teachers and they were not administrators, therefore, in the understanding of the current educational system, the idea or concept of "teacher as leader" or "coach" is still not easily recognized.

The participants came to a realization that adults learn differently than children. The participants discovered that adults learn what they want to learn, what they are interested in, or

what they feel would value their work. According to Cranton (2016), adult learning is considered, in most cases, a voluntary event lead by self-motivation and self-direction. Individuals choose to become involved in learning activities because they want to develop personally or as a response to a professional need. The participants recognized their unfamiliarity of being in a position of a change agent when working with other teachers. Most of the participants did not feel equipped with the knowledge or skills to work with adult learners.

The participants' confidence levels as an educator dwindled due to the lack of preparation and vagueness of the teacher leadership role. Prior to becoming a teacher, one is involved in four years of undergraduate preparation followed by two years of graduate level education. An educator is well equipped when stepping into a teacher role. However, little, if any, preparation time occurred for the participants before becoming teacher leaders. The participants valued the autonomy of their position, although, they desired parameters that would add clarity to their job roles. They yearned for a structural and logical way to perform their jobs that included support from their school or district administrators.

Using Sense of Agency to Grow as Educators

The participants understood that being in a leadership position required additional knowledge and skills. Therefore, the participants worked towards an advanced graduate degree in educational leadership. The participants did express their educational leadership programs enhanced their understanding of the education field and built their leadership skills. However, their educational leadership programs prepared them more for administrative positions, rather than, how to be teacher leaders in the roles such as instructional specialists or coaches. Thus, programs for educational leaders and teacher leaders have a common foundation in the idea of "leadership" but are distinctly different in the educators' role within the field of education.

These two areas in education do not lead to the same end goal. Moody (2019) expressed that teacher leadership is more about, "…attending to *logistical issues* such as pairing coaches with teachers and scheduling coaching sessions; *structural issues* such as the coaching model to be used; and *human capital issues* such as the quality of coaches" (p. 31).

In order to support teachers, the participants found it necessary to expand their knowledge of the subject content, in which, their teacher leadership position focused such as literacy, mathematics, and teacher evaluation. Having in-depth knowledge of the subject content, not only helped the teacher leaders gain confidence in themselves, it increased their credibility with teachers and led to better ways of supporting teachers' practices.

Shaping Who the Participants Are Today as Educators: The Transformative Learning Experience of Teacher Leadership

The participants went into teacher leadership with assumptions of how other teachers performed in the classroom. Most the participants thought the teachers in their schools and districts were competent teachers, however, after having opportunities to visit classrooms, the participants learned that many teachers needed support in the areas of instructional practices and content knowledge. In a few cases, the teacher leaders thought they were the experts to provide skills and knowledge to the teachers they worked with, but instead, they saw well developed lessons and instruction. Through self-reflection, the participants changed their perception of their role as teacher leaders, when working to support teachers.

The teacher leadership experience broadened the participants understanding of the organization and how it is a structured learning system that includes layers of support for student and teacher learning. For some participants, they became aware of parts of the organization they did not know existed. The participants developed an understanding of what Senge (1990) calls

"systems thinking". The participants' perception changed and for a few, they began to internalize ways to make the system better.

For the participants, their teacher leadership experiences helped prepare them for their current positions in education. Most the participants became educational administrators, with a few, entering the role of a data coordinator. The opportunity of being teacher leaders transformed their beliefs, values, assumptions, and perceptions of education; helping them to reach new levels of understanding as an educator.

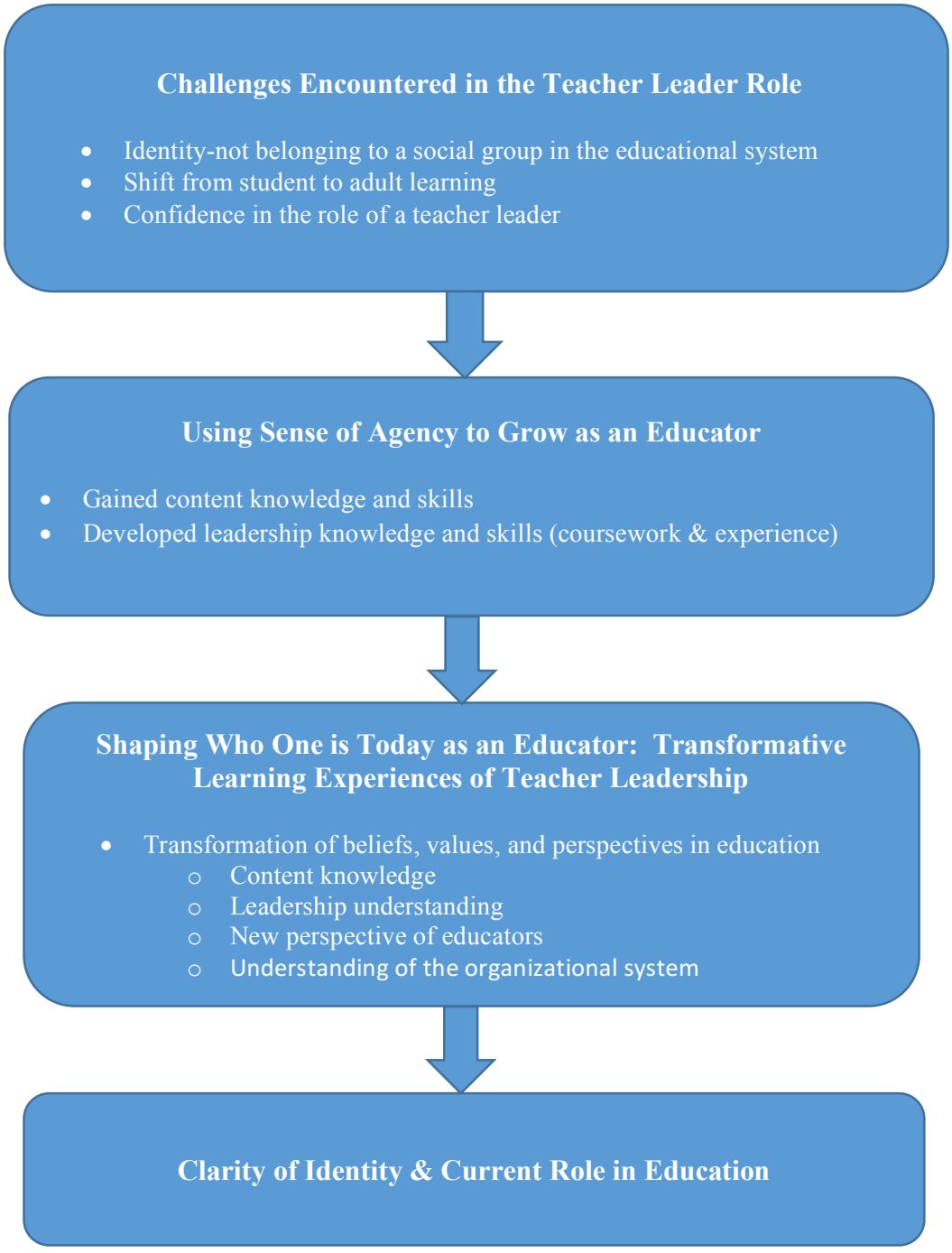

Figure 7.1 Proposed Theory of Teacher Leadership Transformation

Limitations and Recommendations for Future Research

This study focused on teacher leadership and the ways former teacher leaders made sense of their teacher leader experience. Eight former teacher leaders participated in this study. Given the backgrounds, teaching experiences, and personal understanding of teacher leadership, each participant to this study had their own unique experiences and insights about teacher leadership. The participant population was focused in the northeastern part of the United States, creating a future study that encompass a larger region of the United States would enhance the participant pool and provide an even deeper understanding to the phenomenon.

This study sought to engage a diverse participant population of teacher leaders. Participants in this research reflected the diversity of culture and conditions from surrounding schools and districts, taking into account race, ethnicity, gender, and age. Efforts were made to diversify the participant engagement in this study to provide a thorough understanding of how teacher leaders made sense of their experiences. However, a recommendation for future teacher leadership research would suggest that if the participant pool is expanded beyond the northeastern, the opportunity to include a more diversified population would exist. Having a diverse participant group would reflect the rich diversity in our nation's communities, schools, and districts, hence, deepening teacher leadership studies to generate information about practices, policies, and any disparities in teacher leadership. Future teacher leadership studies would benefit by reaching out into urban, suburban, and rural areas in the United States that have strong diverse communities.

It was important me to understand my own subjectivity in this research process. I am a white, middle class, female. I understand that being a white person has meaning and brings with it the idea of white privilege to this present day. I continue to learn how the racial history of the United States has plagued our nation and caused a disadvantage for non-white people and their

communities. I acknowledged the need to work through my own white fragility to comprehend the necessary part I must take to help establish equity in education (Diangelo, 2018). Thus, being aware of my whiteness has helped me understand my experiences of emotions, thoughts, and reflections to comprehend how they influenced this research. I understand that who I am in this research played a part of how the participants responded to questions during the interviews and focus group. Thus, the participants might have brought preconceived feelings and bias to the research setting. During the participant part of the research, efforts were used to alleviate any uncomfortable situations for the participants. In future teacher leadership studies, using the methods of semi-structured interviews and focus group, it would benefit the researcher and the participants to have a "getting to know you time" prior to staring the interview questions. This would help to put the participants in a better state of comfort with the research process. Another way to ensure the participants are comfortable with the research process is to welcome a setting that is private and familiar for them such as in their classroom or office.

In addition, further research is needed, particularly longitudinal studies that use the data collection tools of semi-structured interviews and focus group that study teacher leader participants from the beginning to the end of their educational experience to fully comprehend Mezirow's ten phases of perspective transformation.

Implications and Recommendations

This research study suggests that teacher leadership employs a transformative paradigm, in which, educators seek action and are actively involved in their transformation through professional learning experiences, shifts in levels of understanding, and engagement in critical reflection. This section provides important implications and recommendations for the practitioner and researcher communities, in supporting the continuous development of teacher leadership. The

implications are categorized as university/college Level, school/district level, and federal and state level.

- **Implications for University/College Level**
    - Teacher leadership preparation programs should be infused at colleges and universities as part of a Master's degree in education. These teacher leadership programs should focus on preparing teachers for career ladder opportunities beyond the classroom such as instructional specialists and instructional coaches. Coursework in these programs should focus on how adults learn and adult education. These courses would include opportunities to visit and view other teacher practices. Additionally, teacher leadership preparation programs should include courses on leadership, specifically, how teachers in leadership positions would employ knowledge and skills to support their colleagues, student development, and school/district improvement.
- **Implications for School/District Level**
    - Schools/districts should promote the significance of teacher leadership by clearly defining teacher leadership that includes establishing its purpose and creating a job role description with responsibilities. This would include creating the conditions and structures that support teacher leadership and weave these throughout the culture and climate of the school/district. This climate and culture is one were teacher leaders know their identity as educators, are supported by administrators and other teachers, and are valued for their service to others.
    - Schools/districts that employ teachers in teacher leadership positions should provide these educators with teacher leadership preparation programs and on-going

professional development support throughout their tenure. This would include providing teacher leaders training on adult learning and the transformative learning process.

- There is a growing interest in the education field in hybrid professional development such as through listservs, webinars, blogs, and online networks. This type of professional development brings teacher leaders together to interact, learn from each other, share their experiences, and resources. This type of professional development, according to Hanusci, Cheng, Rebello, Sinha, and Muslu (2014) promotes the development of teacher leader identities.

- **Implications for Federal and State Level**
  - The United States Department of Education has not taken a stance on teacher leadership since 2014, when the Teach to Lead initiative began. At that time, the United States Secretary of Education, Arne Duncan, stated that our nation's education system was going through, "A series of changes-in raising standards, in assessment of student learning, in systems for support and evaluation of educators-is changing classrooms pretty much everywhere" (Teach to Lead: Advancing Teacher Leadership, 2014). Education in the United States has continued to evolve since 2014. The United States Department of Education has enacted Every Student Succeeds Act (ESSA), leading to significant changes in education. Therefore, the United States Department of Education, along with state education departments, should renew their policies on teacher leadership. Federal and state officials need to examine their understanding of teacher leadership by collaborating with practitioners and researchers in the field to develop up to date federal and state

guidance for schools and districts for employing and supporting teachers in teacher leadership roles.

- Federal and state officials need to examine the possibility of teacher leadership becoming a professional certification for educators during their graduate studies. Traditionally, when one becomes a teacher, there is not much of a career ladder other than possibly changing levels or content areas. Enacting a career ladder option, such as a certification in teacher leadership, opens up other opportunities for teachers interested in greater responsibilities and different types of roles. This may lead to greater teacher retention in the field and less teacher burn-out.

Final Thoughts

My intentions for this dissertation was to examine the ways former teacher leaders made sense of their teacher leadership experience. Thus far, research remains largely on the work teacher leaders do and their effectiveness with school improvement. There is much to learn on how teachers grow to be teacher leaders and the ways in which teacher leaders transform as educators. The purpose of my qualitative study, therefore, is to provide a significant contribution to the development of the current thinking on teacher leadership. The rationale for recognizing former teacher leaders is due to the in-depth responses received from the interviews with former teacher leaders during my second pilot study. Former teacher leaders had time away from the role, thus, reflecting on their knowledge and experience, to communicate specific details of how they make meaning of their transformation (Mezirow, 1991).

As the researcher, embarking on this journey to learn more about teacher leadership broadened my perspectives and understandings about the phenomenon. I learned the importance of conducting research as a way of contributing knowledge to the field of education. In

conclusion, I am hopeful that this research will encourage practitioners and researchers to engage in the continuous development of teacher leadership, in such a way, that will improve the professional lives of teacher leaders, their colleagues, administrators, and researchers.

Appendix A

Semi-Structured Interviews

SYRACUSE UNIVERSITY
SCHOOL OF EDUCATION
DEPARTMENT OF TEACHING AND LEADERSHIP

Content Form:

Project: Teacher Leadership

My name is Karen Humphrey and I am a doctoral student at Syracuse University. I am inviting you to participate in a research study. Involvement in the study is voluntary, so you may choose to participate or not. This sheet will explain the study to you and please feel free to ask questions about the research if you have any. I will be happy to explain anything in detail if you wish.

I am interested in learning more about teacher leadership. You will be asked to participate in one interview with a possibility for a follow interview to elaborate or clarify interview question responses. This will take approximately 45 to 60 minutes of your time for the interview. Interviews will take place in the participant's work location in an office or classroom where a door can be closed for privacy. All information will be kept confidential. In any articles I write or any presentations that I make, I will use a pseudonym for you, and I will not reveal details or I will change details about where you work. The participants' identity will only be known by the researchers.

I would like to request to audio record the individual interview sessions. Only the researchers will have access to the recordings. The interview recording device and written notes will be kept in a professional bag that will always be secure in the researcher's possession during the visit to the research site. The purpose for recording is solely for data analysis and these recordings will be erased after a seven-year period of time. Audio files will be kept on the researcher's personal laptop and access will be password protected.

The risks of participation in the study to the participants are minimal, although the inclusion of one to one interviewing as a data source may increase it somewhat. There is a slight risk that identities may be revealed, despite our efforts to prevent this. The participants may experience some discomfort when being asked to discuss their practices related to teacher leadership during the interviews.

The benefit of this research is that you will be helping us to better understand teacher leadership positions. There are no benefits to you by taking part. The risks to you of participating in this study are inconvenience and annoyance. These risks will be minimized by my willingness to be flexible and schedule interviews when it is convenient to you. If you do not want to take part, you have the right to refuse to take part, without penalty. If you decide to take part and later no longer wish to continue, you have the right to withdraw from the study at any time, without penalty.

Contact Information:

If you have any questions, concerns, or complaints about the research, please contact Dr. George Theoharis at 315-443-9079 and gtheohar@syr.edu or Karen Humphrey at 315-480-6832 and kmhumphr@syr.edu. If you have any questions about your rights as a research participant, have questions, concerns, or complaints that you wish to address to someone other than the investigator, or if you cannot reach the investigator, contact the Syracuse University Institutional Review Board at 315-443-3013.

All of my questions have been answered, I am 18 years of age or older, and I wish to participate in this research study. I have received a copy of this consent form.

___ I agree to be audio recorded

___ I do not agree to be audio recorded

_____ _____

Signature of Participant Date

_____

Printed Name of Participant

_____ _____

Signature of Researcher Date

_____

Printed Name of Researcher

Semi-Structured Interview Questions:

1. How would you describe your former position as a teacher leader?
    a. Your title as a teacher leader
    b. Length of time in the position
    c. Job role and responsibilities
2. What interested you in becoming a teacher leader?
3. Could you describe the ways you prepared for the role (coursework, professional development, etc.)?
4. During your time as a teacher leader, what knowledge and/or experiences led you to develop a deeper understanding of the role?
    a. In what ways are you seeing familiar concepts from a different perspective?
5. What did you perceive to be your professional identity during that time?
    a. How as that changed from your role as a teacher?
6. How had the culture in your school and/or district play a part in your growth or change as an educator?
7. How did your perception about the field of education change while in the role of a teacher leader?
    a. What was different about the way you saw yourself within the organization you worked as a teacher leader?
8. What personal and/or professional transformations have you experienced during your time as a teacher leader?
    a. Relating to your beliefs, values, and perspectives

b. Relating to your historical background, racial perceptions, and ethnicity

9. After the role of teacher leader, what role did you involve yourself in?

    a. What led you to that role?

    b. How did being a teacher leader, prepare you for that role?

10. What is your current role in education?

11. At this point, please feel free to add anything else to the interview that you might feel is relevant to the discussion.

Appendix B

Focus Group Discussion

Script is adapted from Bogdan and Biklen (2007)

Opening Script for Facilitator:

Hello Everyone. Thank you so much for coming and participating in this research study. I am interested in how former teacher leaders make sense of their experiences after leaving that role. More specifically, I am interested in learning about the ways former teacher leaders' beliefs, values, and perspectives about the education field changed; how their professional identity and vision of themselves within the educational organization transformed. I am interested in how your thoughts are grounded in your individual experiences. That means I want to talk about specific experiences you had when you were a teacher leader. I am interested in details that may not seem important to you. I want to hear your stories. There are no right or wrong answers. I am interested in understanding your perspective on teacher leadership. You shouldn't feel that you have to agree with everyone else in the room if that's not how you really feel. I expect that people will have different views. It is important to learn about all the views that are represented here. But, if you find yourself feeling upset about the conversation, you can leave at any time. The discussion will be audio recorded to create a transcript for analyzing the data. I ask that you talk one at a time so that I can be sure to hear everyone's views and get them on tape. When you say something, please say your name first so that the audio recorder picks up who is talking. I have developed a series of preliminary questions that all of us will start out following but I will also let the tone of the group determine where the questions will go.

All your ideas are a value to my research and what you say in the group will stay confidential. At this time, I ask you to please complete the *Promise of Confidentiality* form. Again, thank you for your participation in this research study.

Promise of Confidentiality

This form is intendent to protect the confidentiality of what members of this discussion group say during the course of this study on *Teacher Leadership.* Please read the following statement and sign your name, indicating that you agree to comply.

I promise that I will not communicate or talk about information discussed during the course of this focus group with anyone outside of my fellow focus group members and the facilitator.

Name _____

Signature _____

Today's Date _____

Facilitator Signature _____

Focus Group Questions:

1. Please introduce yourself to the group and tell us where you were a teacher leader.

2. How did you overcome the unfamiliarity of being a teacher leader?

3. At times, when you were teacher leaders, you expressed you may not have felt valued, please describe why you had those feelings.

4. Some of you described that parts of your job as a teacher leader were a catch-all role or being responsible for tasks that did not relate to being an instructional coach.
    a. How did this influence you as an educator?
    b. What did you learn about how the role was structured?

5. You shared that there was a learning curve while in the position of a teacher leader.
    a. Why did you express this sediment?
    b. How did this learning curve change you as an educator?

6. You shared that providing professional development to teachers/staff was a responsibility of a teacher leader.
    a. How did you prepare for being a staff developer?

7. While in the role of teacher leader, you worked with many teachers and administrators.
    a. If you had the opportunity after being a teacher leader to go back into the classroom as a teacher, what would you do differently?
    b. If your goal was to become an administrator, how did your teacher leadership experience prepare you for that positon?

8. If you could be a teacher leader again, what would you do differently?
    a. How would you structure the position?

9. Many of you described that it was difficult to understand your identity as a teacher leader.
    a. What did you learn from that experience?

10. You shared that the leadership in the building helped you to grow as an educator.
    a. What characteristics did you value?
    b. Do you see yourself as having those characteristics?

11. How did your setting (urban, suburban, rural district) attribute to your growth as a teacher leader?

12. Describe your thoughts about being in a supporting role working with teachers, administrators, and other staff?
    b. How does this differ from being a teacher?

Appendix C

Dissertation Timeframe

The following is the timeframe of this study:

Month	Procedure of Study
December 2018	Complete dissertation proposal which includes the introduction, literature review, and methods chapters
January to May 2019	Locate participants, obtain informed consent, begin interviews of participants, and start initial analysis of interview transcripts
March 2019	Amend and extent IRB, conduct follow-up interviews
May 2019	Organize and conduct focus group of participants, analyze the focus group transcripts
May 2019 to August 2019	Complete data analysis, write findings, introduction, and conclusion chapters of dissertation
September 2019 to March 2019	Write findings and conclusion chapters. Revisit all chapters for revisions.
April 2020	Oral defense of dissertation

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Williams, G. H. (1986). *Perspective transformation as an adult learning theory to explain and facilitate change in male spouse abusers.* Northern Illinois University. Unpublished doctoral dissertation.

York-Barr, J., & Duke, K. (2004). What do we know about teacher leadership? findings from two decades of scholarship. *Review of Educational Research*, 255-316.

Zong, J., & Batalova, J. (2017). *Migration Policy Institute*. Retrieved from Migration Policy Institute: http://www.migrationpolicy.org

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Education

Syracuse University
Doctor of Philosophy (Ph. D.) in Teaching and Curriculum — May 2020

State University of New York at Oswego
Certificate of Advanced Study (CAS) in Educational Administration — August 2010
Master's in Reading Education (K-12) — May 2001
Bachelor of Science in Elementary Education (N-6) — May 1998

Certifications

School Building Leader Certificate — August 2010
School District Leader Certificate — August 2010
New York State Permanent Certificate in Reading (K-12) — May 2001
New York State Permanent Certificate in Elementary Education (N-6) — May 2001

Dissertation

Humphrey, K. *Challenging Our Sense of Ourselves: Teacher Leaders' Transformative Learning Experiences.* Manuscript in preparation.

Advisor: George Theoharis, Ph.D.
Committee: Jeffery Mangram, Ph.D., Dalia Rodriguez, Ph.D.

Publications

Farrell, T., Hill, K, & **Humphrey, K.** (2010). Project L.E.A.D.E.R: Leadership essentials for articulated & aligned curriculum, dialogue & discourse among staff members, effective & efficient instruction and reflective & responsive practice. *Teacher to Teacher: Project S.H.A.R.E. Studies Highlighting the Action Research of Educators.* 35-47. Marcellus Central School District. Marcellus, NY.

Devendorf, H., Dunn, T., Farrell, T., Glisson, D., Hill, K., **Humphrey, K**., Mahoney, C., Rein, K., Riefler, R., Sundberg, M., & Young, M. (2010). Acquiring the master teacher mindset: a study guide focused on Robyn Jackson's principals of great teaching. *Teacher to Teacher: Project S.H.A.R.E. Studies Highlighting the Action Research of Educators.* 177-193. Marcellus Central School District. Marcellus, NY.

Manuscripts Submitted for Publication

Humphrey, K. & Theoharis, G. (2019). *Teacher Leadership: A Growing Momentum*. Manuscript submitted for publication.

Manuscripts in Preparation

Humphrey, K. (in preparation). Challenges of Teacher Leadership. Manuscript in preparation.

Humphrey, K. (in preparation). "Jump Right into that Role and Learn": Teacher Leaders Using their Sense of Agency to Grow as Educators. Manuscript in preparation.

Humphrey, K. (in preparation). The Transformative Learning Experience of Teacher Leadership: Shaping Who the Participants Are Today as Educators. Manuscript in preparation.

Conference and Workshop Presentations

Humphrey, K. (2020, February). *Challenging Our Sense of Ourselves: Teacher Leaders' Transformative Learning Experiences.* Poster presented at Syracuse University's 10th Annual Teacher Leadership Conference; Syracuse, NY.

Humphrey, K. (2019, July). *Addressing Every Student Succeeds Act (ESSA) Accountability Determination Status through Goal Setting and Action Planning*. Liverpool CSD, Liverpool, NY.

Humphrey, K. (2018-2019). *Using the Data Wise Process for Improvement to Support Educators in Using Data Inquiry to Drive Continues Improvement in Teaching and Learning.* Liverpool CSD, Liverpool, NY.

Fiedler-Horack, A. & **Humphrey, K**. (2016, March). *Swimming in Data and Deadlines: Strategies to Help You Stay Afloat*. New York Schools Data Analysis Technical Assistance Group, Albany, NY.

Humphrey, K. (2016, March). *Response to Intervention-Tier 1 Design and Strategies*. Cazenovia CSD, Cazenovia, NY.

Humphrey, K. (2015, October). *Strategies for Analyzing Student Data*. Cazenovia CSD, Cazenovia, NY

Humphrey, K. (2012, August). *Never Work Harder Than Your Students: Based on the Work by Dr. Robyn F. Jackson*. Mexico Academy and CSD, Mexico, NY.

Humphrey, K. (2012, October). *Unpacking the Common Core Learning Standards*. Mexico CSD, Mexico, NY.

Farrell, T., **Humphrey, K**., & Wright, K. (2009-2010). *New Teacher Mentor Series*. Marcellus CSD, Marcellus, NY.

Humphrey, K. & Shova, V. (2003, March). *Traveling Around the World: Project-Based Learning.* Central Square CSD, Central Square, NY.

Hirst, S. & **Humphrey, K**. (2002, March). *Character Education: Journey to Implementation.* Baldwinsville CSD, Baldwinsville, NY.

Research Interests

- Teacher Leadership
- Transformative Learning Experiences of Educators
- Teacher Education
- Early Childhood Inclusive Education
- Teachers as Action Researchers
- Educational Leadership
- Women in Educational Leadership
- Cultural Responsiveness, Diversity, Inclusion, and Equity in P-12 Education

Academic Teaching Experience

2014-2015 **Graduate Assistant (**Fall 2014**); Instructor (**Spring 2015)
Syracuse University: Department of Teaching and Leadership
Undergraduate Course-EED 314: Teaching Strategies for Inclusive Education

- Focused instruction encompassed developing diverse and inclusive curriculum and instruction for all learners, lesson planning, classroom management, and building classroom community and climate

2014-2015 **Graduate Assistant, Fall 2014, Instructor, Spring 2015**
Syracuse University: Department of Teaching and Leadership
Undergraduate Course-EED Block One Field Experience

- Collaborated with EED Block One professors to plan and co-teach five shared classes per semester which prepared students to conduct field work in an elementary school

Professional Experience

2016-Current **Director of Staff Services**
Liverpool CSD, Liverpool, NY

- Oversee the development and implementation of building action plans for student and staff improvement related to ESSA accountability measures, which include, goal setting, action strategies, and needs assessment to improve curriculum, instruction, and assessment
- Provide professional development in the areas of data analysis, school improvement, ESSA, assessments, and cultural responsiveness, diversity/inclusion, and equity in education
- Assist in the application, implementation, and evaluation of ESSA (Title) Funded Grants

- Supervise the district's Annual Professional Performance Review Plan (APPR) including student learning objectives (SLOs) and management program (MLP/OASYS)
- Independent evaluator for teachers under the Liverpool Annual Professional Performance Review
- Assist in the development, implementation, coordination, evaluation, and assessment of educational programs
- Verify district SIRs data for reporting to New York State Education Department
- Prepare data reports for the Board of Education in relation to student enrollment, demographics/subgroups, poverty, chronic absenteeism, and Regents/Grades 3-8 state exams
- Coordinate the district testing of the New York State Exams and local interim assessments
- Manage district FOIL requests
- Oversee district record maintenance as district record officer

2015-2016 **District Data Coordinator**
Central New York Regional Information Center/OCM BOCES, Syracuse, NY

- Lead district data teams in various school districts across CNY to develop processes and procedures related to the successful implementation of Response to Intervention
- Worked closely with building leaders and data teams for the purpose of analyzing and interpreting data to create action plans for student improvement
- Provided regional training to educators in Response to Intervention and STAR Benchmark Assessment
- Assisted districts in verifying data from source systems required for the data warehouse and New York State Education Department reporting, i.e., BEDS, Staff Reports, Special Education-PD system, 3-8 NYSTP, and high school accountability

2011-2014 **Principal-Mexico Elementary School**
Mexico Academy and Central School District, Mexico, NY

- Created professional learning communities (PLC) with teachers and support staff that met weekly and quarterly (in-depth meetings) to analyze grade level curriculum, instruction, and assessments for school-wide improvements
- Evaluated teachers in relation to the Annual Professional Review Plan (ARRP) plan by providing feedback on their instructional practices, classroom management, classroom environment, and service to the field of education.
- Developed a building plan for Response to Intervention to support at-risk students
- Collaborated with teachers to enhance blended learning and project based learning

- Constructed the building budget and managed purchase requests
- Designed the building master schedule in collaboration with the building team

2010-2011 **Administrator/Teacher on Special Assignment**
Paul V. Moore High School, Central Square CSD, Central Square, NY

- Developed interventions with the high school leadership team to enhance the academic success of at-risk students including an after school peer tutoring program, a credit recovery program, and collaboration with community resources
- Collaborated with all high school departments to provide professional development in reading and literacy skills in the content area for student improvement
- Facilitated the GED program and worked together with the guidance department to create an exit survey for students entering the GED program
- Organized the schedule for the January and June Regents/Local Examinations
- Processed student disciplinary reports by conducting investigations, contacting parents, communicating with faculty members and administrating the consequences per the student code of conduct

2009-2010 **Administrative Intern**
Marcellus Senior High School, Marcellus CSD, Marcellus, NY

- Implemented Project L.E.A.D.E.R. (Leadership Essentials for Articulation/Alignment of Curriculum, Dialogue/Discourse among staff, Effective/Efficient Instruction, and Reflection/Responsive Practice) to facilitate the growth and development of the instructional staff
- Conducted a program review for Languages Other Than English through the School Alliance for Continuous Improvement (SACI)

Summer 2009 **Administrative Intern/Middle School Assistant Principal (grades 3-9)**
Oswego County BOCES Mexico, NY

- Supervised the SummerTime on Campus program for grade levels 3-9
- Interviewed candidates for teaching and support staff positions
- Supervised teachers and support staff

1999-2009 **Elementary Teacher**
Hastings-Mallory Elementary, Central Square CSD, Central Square, NY

- Appointed by principal as mentor teacher to assist new teachers
- Co-taught with special education teachers to differentiate instruction for all learners
- Collaborated with special area teachers for project based learning and blended learning
- Coordinated the implementation of a Character Education program

- Facilitated the building SITE Team and Building Literacy Team
- Contributed as the building facilitator for the district social studies department

Professional Affiliations

- American Education Research Association (AERA)
- Association for Supervision and Curriculum Development (ASCD)
- New York Schools Data Analysis Technical Assistance Group (DATAG)
- School Administrators Association of New York State (SAANYS)