

Exploring the Experience of AISI Instructional Teacher Leaders

by

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Abstract

Instructional teacher leaders are teachers who are asked to facilitate school improvement through mentorship, collaboration, coaching and professional dialogue. These teachers, who are usually not supervisors or administrators, are faced with the challenge of leading through encouragement and support rather than through directives and demands. This study examined the case of the instructional teacher leader and how teachers in these roles negotiated their identity as they dealt with the responsibilities and constraints of their duties. The research drew upon a series of semi-structured interviews with ten instructional teacher leaders from Alberta enlisted to work with and lead their colleagues in three year school improvement initiatives stemming from district and site-based projects sponsored by the Alberta Initiative for School Improvement (2000-2013). The ten participants, who worked as lead teachers and instructional coaches, came from a variety of leadership roles and contexts.

This dissertation used an adaptive process model as a frame to describe how teachers negotiate their roles and identity and work through the process of supporting and leading through instructional change. Observations and anecdotes from instructional teacher leaders were used to substantiate previous research, identify emergent themes, and develop this model. The resultant Instructional Teacher Leader Adaptive Process Model incorporated four interrelated and concurrent sub-processes: 1) clarifying leadership purpose and identity, 2) engaging the faculty in strategic change, 3) responding to organizational and relational challenges, and 4) reflecting on the work and reforms. Using excerpts from teacher interviews to support and contextualize them,

these sub-processes are fully described and elaborated - each in a separate chapter of the dissertation.

As a result of this study, suggestions were made regarding: considerations for prospective and continuing instructional teacher leaders, strategies for leading educational reforms from within a shared leadership model, and considerations for school and district leaders who would like to encourage and support instructional teacher leadership. In addition, a number of recommendations regarding the selection, training, support, professional growth and ideal contexts for instructional teacher leadership were also shared.

Preface

This dissertation is an original work by Jeff Kuntz. The research project, of which this dissertation is a part, received research ethics approval from the University of Alberta Research Ethics Board, under the title of: *Examining the Experience and Role of the AISI Teacher Leader*, Pro00039593, on 04/06/2013.

Dedication

This study is dedicated to those teachers who take on instructional teacher leadership
with all of its challenges and rewards.

GO to the People;
Live among them;
Love them;
Learn from them;
Start from where they are;
Work with them;
Build on what they have.

But of the best leaders,
When the task is accomplished,
The work completed,
The people all remark:
"We have done it ourselves"

Lao Tzu (sixth century B.C. philosopher)

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- My examining committee, Dr. Greg Thomas, Dr. Elaine Simmt, Dr. Pam Adams, and Dr. Sabre Cherkowski.

Above all, I give thanks to my Creator, Redeemer, and Sustainer – the One who provided an ultimate model for servant leadership.

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Chapter 1: Introduction

Teacher leaders have a single guiding purpose—to build capacity in others. They use their talents to influence, shape, support, and catalyze change that results in increased student achievement. Their actions reveal their fundamental belief that the more they build capacity in others, the more they contribute to sustaining long-term, deep transformation that allows others to address today's challenges and to be prepared for facing those that arise tomorrow. (Killion, 2007, p. 11)

The Research Focus

With the continuing trend in North American and Albertan schools to implement shared and distributed leadership models and to entrench system-wide efforts to improve student achievement and implement research-based practices, teachers have been challenged to become teacher leaders in their schools and school districts. This was especially the case in the province of Alberta where, due to targeted funding and support through a government initiative for schools entitled: the Alberta Initiative for School Improvement (AISI). Certain teachers were asked to become change agents and instructional leaders in their schools and districts. Hargreaves, Crocker, Davis, McEwan, Sahlberg, Shirley and Sumara (2009a) summarized this development as it applied to the Alberta context:

... by taking on roles as consultants and coordinators and by securing slots of time in school to coach and mentor colleagues, teachers have increasingly spread their wings to be leaders of other teachers. Leadership is no longer confined to the principal's or superintendent's office but is increasingly being spread throughout the professional community, where it retains a close connection to classroom learning. This is a significant, inspiring and world-leading aspect of the changing culture of education in Alberta, at time when teacher leadership is little more than a cliché or a contrivance in many other jurisdictions. (Hargreaves et al., 2009a, p.100)

The AISI initiative in Alberta provided an excellent opportunity to study and learn about teacher leadership. Targeted funding, together with specific accounting and reporting requirements (see appendix 1), obliged jurisdictions to identify, select, and often train individuals for such leadership. Taking on roles like instructional coach, lead teacher, and district consultant, teachers were asked to implement and, in many cases, *lead* educational

reforms by modeling and encouraging changes in pedagogy and practice. These particular teachers are what I have come to call “AISI Instructional Teacher Leaders”; they were asked to champion school improvement through mentorship, distribution of resources and materials, collaborative planning and practice, instructional coaching and focused professional dialogue. Because they were not administrators, AISI instructional teacher leaders were asked to champion instructional reform primarily using their credibility and kinship as practicing or recently practicing teachers. Although AISI was officially shut down as a funding initiative in March of 2013, such instructional teacher leadership continues to thrive in Alberta as it does elsewhere in North America, albeit on a much smaller scale. In Alberta, select schools and districts have made an ongoing commitment to shared leadership models and to instructional reform and have found ways to provide funding and time so that initiatives that rely instructional teacher leadership might be permitted to continue (as was the case for several participants in this study).

For many Albertan teachers, the opportunity to take on instructional teacher leadership provided a way to contribute to the profession in meaningful ways without having to completely abandon your classroom. (Hargreaves et al., 2009a, p. 92). The role also had certain perks; teacher leaders went to more conferences, learned about the latest in research and teaching strategies, networked with like-minded educators, and implemented changes that impacted more than just their immediate classroom. Going into instructional teacher leadership was one way to gain some recognition, improve your own practice, advance your career, and hopefully make a real difference for your school and community. Indeed, as I discovered in my role as an AISI Research Partner, many school boards looked at instructional teacher leaders as “administrators in training”. However, making the transition from working with children to working with adults was difficult for some. Teachers may have been comfortable in their own classrooms, but they may have had little experience in motivating adults, leading change, accessing research, and providing support in a sustained and focused way.

One challenging factor in the transition from classroom teacher to instructional teacher leader was the instructional teacher leader’s obligation to effect change. In fact, “it entails mobilizing and energizing others with the goal of improving the school’s

performance of its critical responsibilities related to teaching and learning” (Danielson, 2006, p. 12). These obligations to energize and empower can be difficult to fulfill, and AISI instructional teacher leaders often found themselves “straddling the line” (Mischler, 1999) between colleague and coach in order to secure goodwill and encourage risk-taking. AISI instructional teacher leaders were to be **teacher** leaders, using kinship, encouragement and support to promote change rather than administrative coercion or demands. In addition, the associated pressures of project management—finding time and opportunity to work with colleagues, securing the appropriate resources, and dealing with measures and accountability— all had an impact when instructional teacher leaders attempted to facilitate a change process.

In 2006 Danielson suggested that the role of teacher leaders required further attention:

Teacher leaders are more than teachers, yet different from administrators. Such a concept of teacher leadership reflects an increasingly recognized hole in models of teacher professionalism that has not yet been fully explored in the professional literature. (Danielson, 2006, p.15)

Danielson’s suggestion had particular applicability for the case of the instructional teacher leader, and to the Albertan context, especially in light of the work done through AISI, provides an ideal context for such a study.

The intent of my study, *Exploring the Experience of AISI Instructional Teacher Leaders*, was to examine the case of the instructional teacher leader and explore how educators in these roles negotiated their leadership identity as they dealt with responsibilities and structural constraints. “Is there an adaptive process that instructional teacher leaders go through as they reflect upon their work and relationships, adjust their approach, and adapt to their circumstances?” To investigate this question, I gathered insights and anecdotes from ten instructional teacher leaders in the province of Alberta, as they participated in interviews and reflected on their work in implementing pedagogical reforms in response to the Alberta Initiative for School Improvement.

The Context for the Study

From September of 2000 to March of 2013, Alberta Education (Alberta's Ministry of Education) maintained and promoted a targeted educational reform program entitled: the Alberta Initiative for School Improvement (AISI). This internationally-acclaimed initiative challenged schools and districts to design, maintain, monitor, and report on locally-developed, school improvement projects and proved that large-scale innovation in a provincial school system is possible (McEwan, 2008, p. 20). Although commissioned reports such as *The Learning Mosaic* (Hargreaves et al., 2009a) showed that AISI's impact upon student achievement was difficult and almost impossible to assess, the impact of AISI upon teacher growth and professionalism was significant:

Informants all agreed that AISI is catalyzing authentic and deep conversations about teaching and learning that are contributing to a richer repertoire of instructional practices and improved student learning in Alberta. They credited AISI with giving them new ways to observe student learning, identify obstacles to achievement, and revise instruction so that their students learn at high levels. By exposing educators to alternative sets of practices, by embedding ongoing support into schools through AISI-funded lead teachers and consultants, by connecting teachers and projects to each other in relationships of mutual learning and support, AISI has helped to re-ignite teachers' curiosity about new and better ways of teaching their students. (Hargreaves et al., 2009a, p.98)

A key part in this teacher growth and curiosity to learn new and better ways of teaching was the emergence and substantiation of the AISI instructional teacher leader. Over the life of this program, AISI was instrumental in facilitating a shift from more traditional models of school and district leadership to more collaborative and distributed leadership models (Foster, Wright and McCrae, 2008). Projects included many roles for instructional teacher leaders including lead teachers (teachers given dedicated time to research and spearhead school initiatives), instructional coaches (teachers who were asked to provide support and guidance for their staff in terms of instructional strategies and organization), district consultants (teachers who shared educational expertise and coaching between schools), and/or AISI Coordinators (project planners/overseers). AISI instructional teacher leaders shaped and guided individual AISI projects by incorporating current research, participating in professional learning communities (PLCs), modeling

effective practice, and promoting meaningful and measurable change (Hargreaves et al., 2009a, p. 100).

AISI instructional teacher leaders were charged with promoting teacher engagement in professional development and reminding colleagues of the principles in effective pedagogy. Hargreaves et al. (2009a, p. 94) called this innovative process: “a creative combination and disruption”. Such a process required teacher leaders to have “adaptive capacity” (Bowman, 2004) as they championed change and dealt with reluctance and resistance to reform. However, teacher leaders also needed to be cognizant of their mandate while they negotiated their roles. In a related study of teacher leaders, Mangin and Stoelinga (2011) pointed out, that too many teacher leaders who advocate for instructional reform actually chose to avoid conflict and purposely de-emphasized their expertise in an effort to build trust; this ultimately undermined the very reforms they sought to advance. This choice to downplay expertise and withhold criticism was also evident with regards to instructional teacher leaders in Alberta. Hargreaves et al. (2009a) also warned about this failing; in their 2009 AISI review these researchers found that some AISI initiatives devolved into “contrived collegiality”, enabled “professional dependency”, and focused only on narrow and conservative improvement goals (e.g. raising short term-achievement results) (Hargreaves et al., 2009a, p. 94).

One effective strategy for addressing the concerns related to contrived congeniality and lip-service to the goals of the improvement project was through the development of a leadership ethic wherein administrators encouraged instructional leadership and leadership teams through their AISI work by fostering teacher engagement in the reform process and cultivating site-specific and individual expertise (Parsons & Harding, 2011, p. 105). In their study of teacher leaders who facilitate instructional reforms, Harris and Muijs (2003) assert that these leaders need to feel supported by administrators who lead by example, empower teacher leaders in their work, clear away structural barriers, and encourage inquiry and risk taking. A combination of all these actions within a distributed leadership model (Harris & Muijs, 2003) has proven to promote more authentic, purposeful and lasting change as opposed to the contrived, dependent and short-lived reforms that Hargreaves et al. (2009a) were wary of.

The Research Question and Related Issues

Eager to learn how and why some instructional teacher leaders were so successful in leading for instructional change, I focused on the following research question:

How did the role of AISI Instructional Teacher Leader affect educators who took on this role, and what can we learn from their experiences?

I assumed that a qualitative study that asked instructional teacher leaders to reflect upon their motivations, choices, experiences, challenges, and legacy would inform educational researchers, district and government leadership, school leadership and, especially, anyone contemplating a career move into instructional leadership. As the research progressed a second question emerged: “Is there an adaptive process that instructional teacher leaders go through as they reflect upon their work and relationships, adjust their approach, and adapt to their circumstances, and if so, can this process be described?”

While there have been significant studies and recommendations on the importance of teacher leaders and their role expectations (Barth, 2001; Bowman, 2004; Crowther et al., 2002; Danielson, 2006; Killion & Harrison, 2007), only a few research studies have actually examined the day-to-day experience of teacher leaders. Cortez-Ford (2008) examined the journeys of teachers who moved into teacher leadership and how each of these teachers adjusted to their new teacher leader identity. Norris (2010) examined the experiences of three teacher leaders in the context of high school reform. According to Norris, participants made sense of their experiences in four ways: through learning, communicating, doing, and reflecting. Norris asserted that teacher leadership identity is shaped and formed when teacher leaders make sense of their experience, learn from it, and enact in response to their learning. Salazar (2010) investigated “the roles and functions of teacher leaders and the specific norms, habits, and structures that supported or inhibited the development of teacher leadership.” All three of these studies provided timely insights into the role and identity of the instructional teacher leader as well as the contextual pressures they face. In *Exploring the Experience of AISI Instructional Teacher Leaders*, I continue this exploration into the lived experience of instructional teacher leaders and add to the research base by providing insight into how instructional teacher leaders build relationships, establish trust, provide feedback, deal with skepticism, and sustain improvement initiatives.

Framing the Research

Before conducting this research, I considered theories and models that would allow for the formulation of focused interview questions and hopefully provide an organizational framework for analyzing and discussing findings. Several organizational frames that described the contexts and influences around teacher leadership were considered in this process including Norris's four ways of "making sense" (learning, communicating, doing and reflecting) and five leadership themes (grappling with identity, facing uncertainty, negotiating tensions, experiencing challenges, and feeling empowered) and Salazar's "Teacher Leadership Theoretical Model" which represented the greater context in which instructional teacher leadership is practiced by outlining how student learning and teacher practice are supported by four interactive influences: school culture, norms of practice, teacher leadership, and communities of practice (Salazar, 2010, pp. 49-50). Using these frames, I was able to draft questions for a series of interviews I could conduct with the instructional teacher leaders who had volunteered to be part of this study.

The interview questions were organized according to four themes: (1) becoming an instructional teacher leader (initiation), (2) working as an instructional teacher leader (roles), (3) living as an instructional leader (relationships), and (4) reflecting on instructional teacher leadership (legacy). The complete interview guides can be found in Attachment Two. Along with these four themes, I specifically targeted six aspects of the instructional teacher leadership experience that were suggested by the literature base. These aspects included:

1. Teacher **motivations** for moving into instructional teacher leadership;
2. The **qualities** that instructional teacher leaders need;
3. The typical **roles** and tasks of instructional teacher leaders;
4. The **challenges** associated with instructional teacher leadership;
5. The kind and level of **impact** that instructional teacher leaders feel they have; and
6. The **optimal conditions** in which instructional teacher leadership may flourish.

As I worked through the data, coding interview transcripts, generating individual summaries and sorting participant responses into data bins, a conceptual model emerged. The conceptual model, the Instructional Teacher Leadership Adaptive Process Model,

describes the instructional teacher leader experience in terms of four iterative and concurrent processes:

- **Clarifying** – Sharing the Vision and Shaping an Identity;
- **Engaging** – Involving the Faculty and Building Relationships;
- **Responding** – Dealing with Challenges and Balancing Priorities; and
- **Reflecting** – Making Adjustments based on Observation, Analysis, and Implications.

This conceptual model made it easier to describe and clarify the adaptive processes that instructional teacher leaders experience as they advocate for school improvement. The conceptual model also provided an organizational framework for discussing the results of this study.

Design of the Research

This inquiry into the experience of instructional teacher leaders was completed using qualitative research methods. The basis for the methodology chosen follows a philosophy of naturalistic inquiry (Guba, 1981). The central intent in this tradition is to emphasize the views of participants, their unique contexts and circumstances, and the way in which they make sense of the issues being examined (Creswell, 2005, p. 48). The bulk of the research was conducted using case study interviews because interviews can investigate complex social situations with multiple variables, the subsequent transcripts and their analysis can provide a rich and holistic account of a particular phenomenon, and the use of participant quotes and observations allows the reader, not the researcher, to determine what can apply to his or her context. (Merriam, 2009, pp. 50, 51)

For the purposes of this study, I chose to interview ten subjects in order to convey the multifaceted case of the instructional teacher leader. Stake calls this multi-case research and argues that individual cases become more comprehensible when they are studied in light of similar cases (Stake, 2006, p. 4). Together these cases represent a particular object, phenomenon or condition (a “quintain” as Stake names it). For the purposes of my study, the phenomenon studied is the experience of the instructional teacher leader in a school improvement role. Through this investigation, examining the experiences of ten instructional teacher leaders from a variety of contexts and in a variety of roles helped construct a more granular yet comprehensive and nuanced understanding

of how these educators grow into their roles and negotiate their identities. The research revealed much about how instructional teacher leaders define themselves and their work; how they advocate for and champion instructional reform; how they respond to challenges and persevere with their mandate; and how they evaluate their success as instructional leaders.

Each study participant was chosen with consideration as to accessibility, ability to complete the interviews, as well as specific teacher leadership role (lead teacher, coach, consultant, etc.) and situation (rural, urban, suburban, elementary, secondary, etc.). Participants included teacher leaders who had experienced success and those who were frustrated or unsure of themselves. The selected instructional teacher leaders participated in four semi-structured interviews that explored (1) becoming a teacher leader, (2) working as a teacher leader, (3) living as a teacher leader, and (4) reflecting on the teacher leadership experience. The interviews were conducted over a two-month period at mutually acceptable venues. Although interviews followed a predetermined format, the interviews allowed for additional inquiry and elaboration.

The selected participants provided diversity. Specifically, participants served in a variety of roles (lead teacher, instructional coach, or coordinator), had a range of experience (new to the role to very experienced), and were placed in different contexts (rural, urban, small schools, large schools etc.). As Stake pointed out, when conducting a collective case study, selection by sampling of attributes may not be the highest priority for a researcher, but balance and variety can provide a better opportunity to learn (Stake, 1995, p. 6). Interviews were recorded and carefully transcribed. Case study data (recordings and transcripts) were maintained in a case study data base and were analyzed on a case-by-case basis before going through cross-case comparisons. Participant responses were coded and organized according to pre-determined and emergent themes. The resultant data set included both general observations and richly descriptive and contextualized accounts.

Using the four themes in the interview guides (becoming, working, living and reflecting) as a working organizational guide, the first person accounts of these instructional teacher leaders were coded and organized into a case study data base that

included anticipated and emergent sub-themes. As the data was sorted and analyzed the working model gradually evolved into the “Instructional Teacher Leadership Adaptive Process Model”. This model eventually provided the organizational framework for the discussion of the findings found in this dissertation. Data analysis revealed distinct patterns and trends, shared discordant responses or opinions, compared the data to the research base, and helped make “assertions not generalizations” (Stake, 1995, p.9) based upon the individual and collective responses of the participants. These assertions are presented using first person accounts from participants (their shared examples, observations, anecdotes, and recommendations) to provide rich descriptions of the experience of the instructional teacher leader.

Strength and Significance of the Study

At this point, our understanding of teacher leadership, its dimensions, roles, responsibilities and identity, is still emerging. There remains considerable debate as to the actual definition of the term “teacher leader” and whether the role is informal, formal, collegial or supervisory (Norris, 2010; Salazar, 2010). This variability in conception and understanding from one educational scholar to the next required me to generate a definition for three different types of teacher leadership: instructional teacher leadership, professional teacher leadership and administrative teacher leadership. Although there can be some overlap between these types, it was important to single out instructional teacher leadership as the focus for this study. Instructional teacher leadership is concerned primarily with school improvement and educational reform. It asks teacher leaders to advocate for the implementation of effective, research-based practices. Instructional leadership is not about sitting on union committees, taking a turn supervising the school dance, organizing playground supervision or sitting on the local school advisory council (these are other types of teacher leadership); it is focused on pedagogy and on improving student engagement and achievement, not by compelling colleagues to make changes but by inviting them into the change process and supporting them through coaching and demonstration.

Exploring the Experience of AISI Instructional Teacher Leaders has helped clarify the role of instructional teacher leader, especially as they champion school improvement. In

fact, the study is both timely and strong because it addresses a gap in the literature about the tension of being more than a teacher but different from an administrator (Danielson, 2006, p.15). In addition, the study is useful to those who are looking at establishing instructional teacher leadership roles in their schools. Because it investigates ten participants who represented a variety of contexts, roles, experience and skills sets, the assertions generated by this study and the examples given provide a rich and nuanced description of instructional teacher leadership. Moreover, the timing of this study, coming at the close of the thirteen-year Alberta Initiative for School Improvement, and the nature of the interviewing process itself gave each of the ten instructional teacher leaders an opportunity to reflect and provide thoughtful retrospectives on an important and soon to be missed era in Alberta's educational history.

Moreover, the study provides an interpretive lens through which we can view and understand the delicate negotiation and navigation processes that teachers experience when they take on the role. These processes are represented in the Instructional Teacher Leadership Adaptive Process Model (see figures 2 and 3). The model outlines four concurrent and interrelated processes that Instructional teacher leaders experience as they lead for instructional change: (1) Clarifying - Taking on the Role and Shaping their Identity, (2) Engaging - Working with the Faculty and Building Relationships, (3) Responding - Dealing with Challenges and Balancing Priorities, and (4) Reflecting - Adjusting based on Observation, Analysis, and Implications.

This study is significant because, as it described the experience of these instructional teacher leaders and the adaptive processes they went through— it also clarified our understanding of what an instructional leader is. In this study the ten participants shared some of the characteristics, roles and expectations that set them apart from classroom teachers and from school administrators. In describing their work, the participants illustrated a variety of effective practices, routines, and principles that helped them do their work. Participants also shared the motivations and ideals that led them to take on such a challenging position.

Exploring the Experience of AISI Instructional Teacher Leaders is significant for the field of school improvement because it contains examples of how instructional leaders say

that they cultivated trust, promoted change, remained authentic and credible, and sustained momentum throughout a change process. These anecdotes and recollections illustrate how certain instructional teacher leaders solved issues related to project implementation, providing support, developing relationships, coping with district and school politics or facing personal and professional pressures. It must be noted that the study relies upon self-reported accounts from each of the ten participants and their anecdotes and examples were not corroborated by the teachers they worked with (for ethical and practical reasons). There was no way of knowing if the people interviewed fabricated or misrepresented certain facts or situations. That said, many of the instances discussed with one instructional teacher leader were discussed a second time with another instructional teacher leader from the same district, which allowed for some triangulation and correlation.

By closely examining the case of the AISI instructional teacher leader, I was able to identify themes and put forward a number of generalizations or assertions (Stake, 1995, p. 9) that should inform all those who are considering teacher leadership, those who are in teacher leadership, and those who study teacher leadership. These assertions relate to the teacher leadership adaptive process, as well as to emergent themes such as professional identity, agency and empowerment, perception and politics, school and district leadership, workable structures for school reform, and the importance of relationships and community building. In addition, the study allowed me to make a number of school improvement recommendations related to selecting instructional teacher leaders, establishing effective school improvement models, preparing and supporting instructional teacher leaders, and optimizing impact of the instructional teacher leader. These assertions can be found in chapter ten.

Delimitations of the study.

This study of instructional teacher leadership is delimited by three conscious choices I made at the outset of the research process. First, I chose to conduct this study on instructional teacher leaders who had played an active leadership role in the now suspended Alberta Initiative for School Improvement (2000-2013). There were, of course, many other informal instructional leaders at schools in Northern Alberta, but AISI

instructional teacher leaders had been given a clear and formal mandate to build capacity in their colleagues and foster school improvement. Second, I chose to focus only on instructional teacher leaders who were not in school administration leadership at the time of their leadership assignment. There were principals and assistant principals who took on the additional role of AISI Leader in their respective schools while they also fulfilled their managerial duties, these administrators. However, by the nature of their role and the power structures within the schools, these administrators would have had a different experience from those who were trying to encourage change without having administrative leverage. Third, I chose instructional teacher leaders from a list of those who had indicated that they were interested and able to participate. So the instructional teacher leaders participating in this study were more likely to have had positive experiences as instructional teacher leaders— those who had disappointing experiences were not as likely to volunteer. In addition, most of these instructional teacher leaders came from schools and districts in Northern Alberta and this made scheduling one on one interviews manageable.

Limitations of the study.

My research was also limited by several factors outside of my control. In the first place, the number of participants for the case study interviews was limited to those who chose to participate. I could not and would not conscript instructional teacher leaders to participate in this study. From my interactions with the participants during the interview process it became apparent that the participants represent those who were very committed to the role and successful in it. Moreover, the study is limited by the fact that the data is the result of first-person accounts from these instructional teacher leaders. The semi-structured interviews contain their recollections, views and their interpretations of significant events. These accounts may be coloured by the passing of time, by their perceptions, and by their rationalizations; they may not present the complete context. Due to concerns with privacy and professionalism, I chose not to corroborate these interviews through in-school observations or follow-up interviews with directors or colleagues. Consequently the data represents only the perspectives and recollections of the teacher leaders themselves.

In addition the study is limited by observer/interviewer bias. As a former instructional teacher leader it was impossible to completely suspend or bracket my own experiences in that role. Conversely, it was my experience as a former AISI instructional teacher leader that established credibility and trust with many of the volunteers; they knew that they were relating their experiences to someone who had a sense of the barriers they were up against and the structural and support issues they were faced with. However, in my conversations, email and during the interviews themselves, I made every effort to let the participants tell their stories and share their insights and I strove to ask questions that simply asked participants to explain and unpack in more detail.

Organization of the Study

This doctoral dissertation, *Exploring the Lived Experience of Instructional Teacher Leaders*, has ten chapters in total. After introducing the study in chapter one (An Introduction), chapter two (The Research Context) provides a literature review of current research on teacher leadership and describes the Alberta context in which this study of teacher leadership took place. Specifically chapter two explains the importance of the instructional teacher leader within the Alberta Initiative for School Improvement and the need to more closely examine the lived experience of those teachers who have been charged with leading their colleagues in school improvement initiatives. In chapter three, The Research Frame, I unpack the Instructional Teacher Leader Adaptive Process Conceptual Model, explaining why it was necessary to construct this interpretive lens and tracing the development of the conceptual model as the study proceeded from initial research question and gained clarity as the readings and ongoing research informed it.

Chapter four, The Research Methodology, describes the qualitative approach employed in my research, and why case study interviews were chosen as the primary methods for data collection. The chapter also includes a brief description of each of the instructional teacher leaders who participated in this study. A more detailed summary of the instructional teacher leaders can be found in Appendix Three. It was important to capture and present the uniqueness of each teacher's case before their stories and insights were compiled and re-organized according to broader themes; this appendix provides such detail.

Then, in chapters five through eight, I used the four concurrent and interrelated processes suggested by the process model to examine and unpack the common experiences shared by these teacher leaders. Chapter five, *Clarifying*, examines how the instructional teacher leaders took on their role, gained the requisite training and clarified their mandate. Chapter six, *Engaging*, describes how the instructional teacher leaders engaged their colleagues in school improvement work and how they provided service, negotiated roles, secured administrative support and established trust. Chapter seven, *Responding*, focuses how the instructional teacher leaders faced challenges as they dealt with resistance and reluctance from colleagues, balanced their own work/life priorities, and persevered in their work. Chapter eight, *Reflecting*, looks at how the instructional teacher leaders made adjustments based upon observation, analysis, implications and considered action.

While the Instructional Teacher Leadership Adaptive Process Model allowed me to conceptualize and explain the kinds of adaptations and adjustments that instructional teacher leaders, the model was not comprehensive. In their responses, the ten teacher leaders had much to share that did not fit neatly into the adaptive process model. Chapter nine, *More Perspectives on Instructional Teacher Leadership*, includes participant insights, reflections, and perspectives from their teacher leadership experience that could not be described as adaptive processes. Much of the data for this chapter came out of the fourth interview, when I asked the participants to appraise their efforts and the legacy of AISI.

The last chapter of this dissertation takes a comprehensive look at the research data and themes to suggest findings and applications. Chapter ten has three main sections. The first section is *Assertions Related to Teacher Leadership Adaptive Processes*, in which I explore how through the adaptive processes teacher leaders find themselves working through reveal deeper themes related to identity, motivation, power and school politics, leadership styles and professional autonomy and agency. The second section, *Emergent Themes That Suggest Further Research*, provides ideas on where to build upon my research and similar studies. The third section, *Implications for School Improvement*, is where I propose what the study reveals about the selection and training processes for instructional teacher leaders, the kinds of support and structures needed to foster success,

and the ideal contexts and leadership models that encourage instructional leadership and acclimate for professional growth.

In the final pages of my dissertation, in addition to the reference list, I have included appendixes that include: a fact sheet on the Alberta Initiative for School Improvement (Appendix One), a copy of the questions used for the four case study interviews (Appendix Two), an introduction to each of the ten instructional teacher leaders and their contexts (Appendix Three) and a copy of the informed consent form that the ten instructional teacher leaders signed (Appendix Four).

Summary

The role of the instructional teacher leader is one that merits attention and research. In an era of budget cuts, burgeoning administrative workloads and increasing pressure to show school improvement through student achievement, instructional teacher leaders (formal and informal) are being asked to take on more responsibility for school wide reforms. Closely examining the experience of teachers who have already faced many of these challenges can inform administrators and prospective instructional teacher leaders and highlight effective practices for establishing credibility, building trust, negotiating work and roles and sustaining momentum in educational initiatives.

In *Exploring the Experience of AISI Instructional Teacher Leaders* I have tried to capture the insights and experience of instructional teacher leaders to present a clearer picture of the personal and professional processes that teachers went through as they championed school improvement initiatives in Alberta. It is my intention that, in reading the following chapters, educators and researchers will clearly hear the voice of these instructional leaders and appreciate their passion for school improvement and for the children and colleagues they worked with. In learning about each of the instructional teacher leaders and about the shared and significant processes that these instructional leaders went through, we may be able to see important lessons and opportunities for school improvement within a shared or distributed leadership model.

Chapter 2: Reviewing the Literature and Setting the Context

This chapter provides background essentials for my study. In the chapter I advance a definition of instructional teacher leadership and delineate it from other types of teacher leadership (professional and administrative); I describe the contexts for the study of instructional teacher leadership; I review current and relevant literature related to the topic; and I explain the development of a conceptual model that helps in describing the processes that instructional teacher leaders experience when they take on this role. In describing the context I will explain some of the reasons for my research: (1) the growing importance of teacher leadership as a component for school improvement; (2) the significance of instructional teacher leadership as it developed through the now defunct Albert Initiative for School Improvement; and (3) my motivation to study instructional teacher leadership based upon my experiences as an AISI consultant and coordinator. In reviewing the research I will explain how others have made efforts to describe the experience of teacher leaders involved in leading for instructional reform and how I undertook the challenge of building upon their discoveries. Lastly, in explaining the development of the Instructional Teacher Leader Adaptive Process Model, I will unpack the progression from a simple investigate model that provided a framework for inquiry to the emergence and refinement of a conceptual model that helps to describe the instructional teacher leadership experience by explaining four concurrent and iterative processes that instructional teacher leaders go through.

Defining Instructional Teacher Leadership

The rise of teacher leadership.

Within every school there is a sleeping giant of teacher leadership, which can be a strong catalyst for making change. By using the energy of teacher leaders as agents of school change, the reform of public education will stand a better chance of building momentum. (Katzenmeyer & Moller, 1996, p.2)

The concept of teacher leader gained special interest during the 1990's when there were pressures to collapse the hierarchy of the schools and engage in distributed or shared leadership. At that time, it was widely recognized that the role of the school principal had

become increasingly diverse and that it was unrealistic for any administrator to both manage the school and provide comprehensive instructional leadership. Katzenmeyer and Moller (1996), Elmore (2000), and Patterson (2001) called for a shift to distributed leadership wherein teachers took a more active role in defining the mission, mandate and operation of the school. With distributed leadership, different school members could assume formal and informal leadership responsibilities in response to particular situations and based upon the expertise of the individual. Katzenmeyer and Moller proposed that teachers, when given more leadership, would be able to capitalize on their relationships with students and colleagues to promote change and reform schools in ways school administrators might not. This change in roles and in organizational structure of the school resulted in teachers being challenged to share their wisdom and make a difference in the planning and practices of their colleagues, both in their schools and their communities.

Teacher leadership became even more important when schooling in the United States was faced with growing demands related to accountability that would result in the “No Child Left Behind” Act of 2001. Shrinking budgets made it difficult for administrators to fulfill all expectations of both managerial and instructional roles, and calls were being made to flatten the hierarchy and implement shared leadership models. At the same time, publications like Katzenmeyer & Moller (1996) and Crowther, Kaagan, Ferguson, & Hann, (2002) provided blueprints for improving schools using teacher leadership as a catalyst.

As a result, many North American schools and districts began to experiment with teacher leadership in an effort to help distribute the workload. It was widely believed that encouraging teacher leadership and giving professionals more ownership of school policy and practice would counteract deteriorating conditions (Acker-Hocevar & Touchton, 1999) and provide much needed stability in school practice and shared pedagogy based upon personal and professional commitment. Teacher leaders would be invested and inspire loyalty to the profession and the school community by leading from the ground up; through collegiality and practical change in practice, based upon research but also responding to immediate, local contexts.

Now, almost twenty years since Katzenmeyer & Moller’s publication, teacher leadership has indelibly changed the way that many schools operate and the way that

teachers plan, teach, and assess their impact upon children. Teacher Leadership, in tandem with Professional Learning Communities (Dufour & Eaker, 1998; Andrews & Lewis, 2002), has brought about unprecedented levels of collaboration and collective inquiry.

The refinement of teacher leadership.

Although the term teacher leader has now been widely used for almost thirty years, coming to a common understanding of what a teacher leader exactly is can be challenging (Akert and Martin, 2012, p. 285, 286; Harris and Muijs, 2003, p.5). Early in the evolution of teacher leadership, Sherrill (1999) pointed out that the term teacher leader was somewhat ambiguous, stating that “teacher leaders are referred to as clinical faculty, clinical educators, teachers in residence, master teachers, lead teachers, and clinical supervisors” (p.57). The term teacher leader was simply used for educators who filled roles other than regular classroom teachers and those who had some expertise or support to share. Since that time, the role of teacher leader has gained clarity, not so much through the titles associated with the work, but by the actions these people perform. In 2006, Danielson asserted that:

The term teacher leadership refers to that set of skills demonstrated by teachers who continue to teach students but also have an influence that extends beyond their own classrooms to others within their own school and elsewhere. It entails mobilizing and energizing others with the goal of improving the school’s performance of its critical responsibilities related to teaching and learning. (Danielson, 2006, p. 12)

For Danielson, it was vitally important that teacher leaders *lead as teachers* and not as supervisors:

Teacher leaders see themselves first as teachers; although they are not interested in becoming administrators, they are looking to extend their influence. They are professional educators who want to continue to work as teachers rather than as managers. Some of these skilled teachers enter administration only to return to full-time teaching because they miss the daily interaction with students. Teacher leaders are more than teachers, yet different from administrators. Such a concept of teacher leadership reflects an increasingly recognized hole in models of teacher professionalism that has not yet been fully explored in the professional literature. (Danielson, 2006, p.15)

Danielson noted two kinds of teacher leaders; formal and informal. Teachers who are recruited, directed, or volunteer for leadership roles beyond the classroom are formal teacher leaders. They may be involved in special projects, help with administrative tasks, take on mentorship roles, or lead in professional development work. Informal teacher leaders “aren’t leaders because they have been assigned to a role or position; rather they earn their leadership through their work with their students, their colleagues, their school and the community” (Portner & Collins, 2014, p. 46). Portner and Collins described informal teacher leaders as self-motivated, initiative takers who emerge from the ranks with vision, energy, and commitment. Although this distinction between formal and informal teacher leaders is useful, it is important to note that both formal and informal teacher leaders “crave intellectual stimulation,” “want to do something that will make a difference in education,” and want to continue working as teachers and not as administrators (Portner & Collins, 2014, p.46).

Delineating between teacher leadership and instructional teacher leadership.

In addition to a distinction between formal and informal teacher leaders, it is also important to recognize that teacher leadership is often dependent upon purpose, organizational structure, and local context (Cortez-Ford, 2008, p. 6, 7). Some formalized teacher leaders help in subtle and “behind the scenes” ways, while others have been appointed to part-time administrative positions in which they are charged with leading reforms or establishing protocols. This range and variety of teacher leadership roles necessitates a closer look at the purposes of teacher leadership and several different perspectives about teacher leadership positions.

One view of teacher leadership is that it is an evolving position that has been dependent upon the dominant leadership culture. As our understanding and models about school leadership change, so too does our understanding of teacher leadership and the role of teacher leaders in education. Cognizant of this evolutionary process, Silva, Gimbert, and Nolan (2000) described teacher leadership as a formalized role that has developed in three waves:

1. Teacher leaders as managers (department heads, union representatives, special needs coordinators) and extensions of the administration – appointed to assist with tasks related to school efficiency.
2. Teacher leaders as instructional experts (curriculum consultants, staff developers, mentors) employed to guide teachers or provide them with resources.
3. Teacher leaders as collaborators and co-creators of a school improvement culture – asked to participate in shared learning refining their own practice as they work with their colleagues.

According to Silva et al. (2000), over time teacher leadership has shifted from fulfilling management roles and maintaining of the status quo to working within more of a shared leadership model in which there is collaboration and the implementation of measurable, locally-based change. This view of teacher leadership can be helpful understanding the ways teacher leaders can support their colleagues; however, the evolutionary process described is not completely applicable to Alberta’s context. While Alberta schools have seen the emergence of the second and third waves of teacher leadership, as Silva et al. (2000) describe it; it is not as if the two earlier iterations of teacher leadership have completely disappeared from schools. In Alberta schools there remains—and there is much need for— teacher leaders as managers, as experts, and as collaborators.

A second view of teacher leadership is presented by York-Barr and Duke (2004), who asserted that teacher leadership is dependent upon position and perspective. York-Barr and Duke suggest four variations of teacher leadership: “participative leadership, leadership as an organizational quality, distributed leadership and parallel leadership” (York-Barr & Duke, 2004, p. 5).

Salazar (2010) unpacks these four variations as:

1. Instructional and participative leadership – in which instructional leaders engage in activities that affect the development and growth of students (Leithwood & Duke, 1999) and participative leaders focus on democratically addressing the actions, needs and opinions of a larger group (Yukl, 1994);

2. Role-based leadership – where leaders perform organizational roles dependent upon the leadership structure of the building and their level of access to resources and decision making. (Ogawa & Bossert, 1995);
3. Distributed leadership – in which there are multiple leaders and the focus is on the interactions rather than the actions of those in leadership roles (Spillane, Halverson, & Diamond, 2001); and,
4. Parallel leadership – where teacher leaders work in parallel with the administrative team to promote student achievement (Crowther et al. 2002).

While these four different types of leadership may assist in placing the teacher leader within the organizational structure and leadership culture of the school, they do not speak explicitly to the central role or purpose of teacher leadership but rather to how teachers might lead within certain contexts; through work in professional learning communities, as department heads, according to specific mandates and roles within the school, or in parallel and partnership with the administrative team.

For the purposes of this study, it was important to delineate between different types of teacher leadership in order to clarify the role and experience of a teacher leader who has been charged with leading and supporting an improvement initiative at the school or district level. In the case of this study the teacher leader was responsible for engaging colleagues in AISI projects at their respective school and in their classrooms. In reviewing the literature and considering the need to accurately describe the purpose and role of the AISI teacher leaders who participated in this study, I present three different types of teacher leadership: (1) professional teacher leadership, (2) administrative teacher leadership, and (3) instructional teacher leadership. Each of the three types of leadership depends upon the school culture and the intrinsic purpose for leading in their respective educational environments:

Professional Teacher Leadership happens when teachers share their expertise and contribute in the school community in professionally responsive ways. Such leadership is often incidental, on-going, and subtle, and asks those with experience to share their wisdom with their colleagues.

Administrative Teacher Leadership occurs when teachers assist in the daily management and oversight of the school as part of a shared leadership model. Such leadership is more organizational in nature and it allows individual staff members opportunities to learn more about school leadership.

Instructional Teacher Leadership happens primarily when teachers are asked to facilitate school improvement through mentorship, collaboration, coaching and professional dialogue. Such leadership is more strategic (planned) than professional teacher leadership but more invitational and collaborative than administrative teacher leadership.

Depending upon the circumstance, each of these types of leadership may intersect and overlap; however, it is still important to see that each role may have different dimensions, pressures, and attractions.

Professional teacher leadership.

Professional teacher leadership is informal, highly-contextualized, and sometimes spontaneous. When teachers step up to confront problems or propose solutions to school issues (suggesting new student safety measures, proposing changes to timetabling, organizing school sports or extracurricular activities, or making presentations to parents on the new reporting systems for example), they demonstrate professional teacher leadership. Such teachers draw upon their own experience and expertise to improve the way a school functions and to assist colleagues by making processes more efficient and effective. Furthermore, if certain teachers step up repeatedly and effectively they will eventually be seen as teacher leaders.

Danielson elaborated on such leadership development when she wrote:

Teacher leaders don't gain their authority through an assigned role or position; rather, they earn it through their work with both their students and their colleagues. Teacher leaders play a highly significant role in the work of the school and in school improvement efforts. Precisely because of its informal and voluntary nature, teacher leadership represents the highest level of professionalism. Teacher leaders are not being paid to do their work;

they go the extra mile out of a commitment to the students they serve.
(Danielson, 2006, p.1)

In professional teacher leadership, all teachers can and should be leaders - depending upon the time and circumstance (Lambert, 2003 424-426; Barth, 2001, p.444). In becoming teachers, individuals become advocates for children and for better schools, and this advocacy cannot be ignored or pushed aside. As such, professional teacher leadership is the natural extension of the role of a teacher in school and community; it is an obligation, a duty. However, this obligation is clearly not the case with the other two types of teacher leadership; not every teacher feels obligated or even equipped to lead in administrative or instructional ways.

Administrative teacher leadership.

Administrative teacher leadership, based upon managerial need, does not come easily to every teacher. In fact, as a number of the participants in this study revealed, many teachers would prefer to remain far removed from the world of school administration and its pressures. Nevertheless, principals have been asked to involve their staff, identify likely leadership candidates, and empower these teachers with decision making responsibilities (Greenlee, 2007, p. 52). The practice of shared or distributed leadership has been being touted as an effective way to transform a school, establish collective efficacy, and move away from the traditional “Great Man” model of leadership (Harris & Muijs, 2003). An administrative teacher leader provides insight, input, and direction over a wide variety of elements in the school’s organization and oversight— including scheduling, programming, budgeting, selecting and purchasing resources, setting standards for student behaviour, assigning students to support classes, designing staff in-service days, setting promotion and retention policies, evaluating teacher performance, selecting new teachers, and even selecting new administrators (Barth, 2001, p.444). Such leadership can be informal (unpaid and untitled) or formal (designated department heads or lead teachers). Administrative teacher leaders have proven to be integral parts of the leadership team of the school, and receive training and support along the way. In many Alberta districts, these teacher leaders are seen as principals in training. (Mayer & Townsend, 2013)

Instructional teacher leadership.

Instructional teacher leadership, is inextricably linked to school improvement and professional learning. Like the first two kinds of teacher leadership, it draws upon professional commitment and service and seeks to build a school culture based upon shared goals and improved practice. However, instructional teacher leadership is narrower in scope and quite different in nature from administrative teacher leadership. Instructional teacher leaders for school improvement are not “principals in training” (although some may end up being candidates for this kind of leadership); being principals is not their primary goal. As Danielson wrote, “They are professional educators who want to continue their work as teachers rather than as managers” (2006, p. 15). Such teachers learn to “function in professional learning communities to effect student learning; contribute to school improvement; inspire excellence in practice; and empower stakeholders to participate in educational improvement” (Childs-Bowen, Moller, & Scrivner, p. 2000). Instructional teacher leadership is about leading in an extremely focused way—using credibility as a recent or continuing classroom practitioner to promote targeted instructional change. Instructional teacher leadership is based upon collaboration, coaching, and mentorship. It requires relationships built upon trust and shared inquiry rather than upon direction, supervision, or evaluation.

Instructional teacher leadership is more deliberate and focused than professional teacher leadership in that it is framed by clearly identified instructional needs and may be supported by any combination of time, resources, and funding. Indeed, many instructional teacher leaders have designated roles (instructional coach, lead learner, or consultant), dedicated time, and some instructional teacher leaders may even earn extra pay. Moreover, instructional teacher leadership is more specific and targeted than administrative teacher leadership in that it is exclusively focused on improving teacher practice to promote student engagement and achievement. With AISI, teachers who stepped into instructional teacher leadership roles were be asked to respond to site-specific circumstances and contexts, but they are also expected to draw upon relevant research, professional publications, and networks, organizations, and affiliations to facilitate meaningful and lasting instructional change (Foster, Wright & McCrae, 2008, p.13, Hargreaves et. al., 2009a,

p.98, Alberta Education, 2013, p. 4) This leadership often required training in educational approaches and theory (e.g. differentiated instruction, assessment, early literacy, inquiry, etc.) and in how to facilitate and lead a change process (including coaching and mentoring techniques).

Although both professional and administrative teacher leadership are certainly powerful and important forces in today's schools, for the purpose of this study I have limited the subject focus to instructional teacher leadership – on leading for instructional change in a non-supervisory, supportive role. Such leadership has become an integral part of school improvement projects across North America and deserves closer attention. I believe that Killion was describing instructional teacher leadership when she wrote:

Teacher leaders have a single guiding purpose - to build capacity in others. They use their talents to influence, shape, support, and catalyze change that results in increased student achievement. Their actions reveal their fundamental belief that the more they build capacity in others, the more they contribute to sustaining long-term, deep transformation that allows others to address today's challenges and to be prepared for facing those that arise tomorrow. (Killion, 2011, p. 11)

Killion's description is especially insightful because it hints at the motivation, rewards, and pressures that confront instructional teacher leaders; these educators are in a position to make a real difference for students, but they must use all of their capacity to effect lasting change.

Setting the Alberta Context for this Study

In Alberta, from September of 2000 to April 2013, Alberta Education (Alberta's Department of Education) made it possible for schools and administrators to cultivate and support instructional teacher leadership as part of their overall school improvement plans. AISI provided targeted funding that helped schools and districts to formulate, administer, refine and document school improvement projects, many of which were dependent upon teacher leadership. Unfortunately, in March of 2013, the Alberta government announced a series of budget cuts that immediately slashed professional supports for teachers. With one sudden decision, the AISI was completely eliminated; teacher leadership in Alberta would

be forced to continue without the targeted funds and centralized support that AISI once afforded it.

Such cuts, while painful, also helped facilitate meaningful reflection. In Alberta, with the benefit of AISI, educators were in danger of taking teacher leadership for granted; AISI had become the way professional development was done. Now, in 2015, it is incumbent upon educators and administrators to take a step back to revisit the whole concept of teacher leadership, especially as it has developed and unfolded in Alberta. A study of the experience of AISI instructional teacher leaders as they championed school improvement efforts at school and district levels should have significant implications not only for the Albertan context, but for every educational leader considering instructional teacher leadership as a way to address issues related to school improvement and professional learning.

AISI and instructional teacher leadership.

As this particular study on instructional teacher leadership is based upon interviews with instructional teacher leaders who took on roles in support of locally-developed improvement projects in Alberta, it is important to know about:

- AISI – The Alberta Initiative for School Improvement, a school improvement initiative that ran from 2000-2013. (Appendix 1 includes a brief fact sheet on AISI)
- How instructional teacher leadership emerged and gained definition in Alberta through the AISI years.
- How Alberta's experience with instructional teacher leadership may be different from other jurisdictions due to AISI's model, the targeted funding and the level of ownership and accountability built into the initiative.

As has been documented earlier in this chapter, in the 1990s there was significant interest in changing the nature of school leadership to facilitate professional learning and educational reform. Hargreaves (1994), Little (1997), Fay (1992), and others were advancing models for school improvement that included shared leadership and collaborative, site-based professional learning. This scholarly work did not go unnoticed in Alberta. Although Alberta's schools and administrators were still adjusting to the severe funding cutbacks of 1994 and the amalgamation of smaller school districts into super-

boards in 1995 (Ell, 2002) several early adopter schools in Alberta began to form what would later be called "professional learning communities" and began flattening the administrative and instructional hierarchies by asking teachers to take on more leadership in the school.

Then, in 1999, the Alberta Government unveiled AISI which was immediately heralded as a "bold approach to improving student learning by encouraging teachers, parents and the community to work collaboratively to introduce innovative projects that address local needs." (AISI Education Partners, 2008, p. i). AISI was the result of "the combined efforts and commitments of Alberta Education and its partners" (Hargreaves et al., 2009b, p.3) including the Alberta Teachers' Association (ATA). School authorities developed AISI three-year project plans to provide support to teachers and students and boost achievement. These project plans needed to meet certain criteria (as specified by the School Improvement Branch of Alberta Education) in terms of overall goals, measures, budgets, strategies and staffing and, if the criteria were met, authorities would receive targeted funding to improve student learning, engagement, and achievement. Although the amount of funding varied over the thirteen years of AISI (In 2000 the funding was allocated at \$120 per student per year, when it ended in 2013 it stood at just over \$71 per student for cycle 5), the funds allocated to AISI reflected a significant amount of the provincial budget for education. By 2009, Alberta Education had spent \$625 million on AISI projects. (Hargreaves et al., 2009b, p.2)

This infusion of targeted funding for school improvement drastically changed professional development in Alberta's schools. In *Leading and Sustaining School Improvement Initiatives* (Foster, Wright and McRae, 2008), Foster et al. assert that AISI was instrumental in facilitating a shift from more traditional models of school and district leadership to more collaborative and distributed leadership models. Alberta Education did not dictate how each AISI project was to be organized or implemented but placed "a great emphasis on professional learning and inquiry as a central element of improvement" (Hargreaves et al., 2009b, p.3). Such learning and inquiry could happen on an individualized basis; but, as was suggested, the most successful professional learning was local and collaborative (Guskey, 2000). AISI advocated for teachers to work together,

responding to site-specific needs while at the same time being guided by a shared vision. In this way, schools would develop in-house expertise that would target local needs related to student achievement, program deficiencies or teacher professional learning.

In 2004, a University of Alberta AISI research team further substantiated both Alberta Education's and Guskey's claims that site-based professional development was both effective and powerful (Parsons, Taylor, McCrae, Servage, & Larson, 2006). After reviewing and summarizing more than 800 final evaluations on AISI cycle one projects (each district or school authority was required to submit detailed annual reports to Alberta Education), the research team concluded: "teachers and groups of teachers, not outsiders, were best able to educate other teachers" (Parsons et al., 2006, p.26). More specifically, the research team was able to identify three professional development models that stood out as being most effective: establishing professional learning communities, employing mentoring and lead teacher models, and participating in action research and inquiry (Parsons et al., 2006, pp. 26-30). These contentions were further corroborated by Foster et al. in 2008.

A key part in each of these three professional development models was the emergence and substantiation of the teacher leader (Hargreaves et. al., 2009a, p.100). Teacher leaders were those teachers who led professional development by engaging in pedagogical dialogue, disseminating their learning to their colleagues, and advocating for timely instructional change—and they did this in the guise of many different roles. AISI projects included roles for lead teachers (teachers given dedicated time to research and spearhead school initiatives), for instructional coaches (teachers who were asked to support and guidance for their staff in terms of instructional strategies and organization), for district consultants (educational expertise and coaching shared between schools), and/or AISI coordinators (project planners/overseers). Instructional teacher leaders helped shape and guide individual AISI projects by learning about current research, by participating in PLC work, by modeling effective practice, and by promoting meaningful change (MacEwan, 2008, p. 20).

However, while AISI greatly changed the way in which Alberta schools engaged in professional learning, it did receive some criticism. At the Colloquium on Large Scale

Improvement: Implications for AISI in October 2008, Heather Welwood (President of the Alberta School Boards Association), questioned whether or not AISI had “run out of gas” and suggested that it had become too safe and needed to “take risks”, “refocus” and improve knowledge transfer. Other voices, both within and outside of education, questioned whether the millions spent on AISI were worth the expenditures (Couture & Murgatroyd, 2011). Was AISI really making a difference in student achievement? For many, the data seemed inconclusive. Questions were being asked about AISI:

- What has been its impact and effects, and how easily are these disentangled from Alberta’s other educational initiatives?
- Are the efforts and impacts of AISI sustainable?
- And could they be achieved more easily or prudently by other means?

(Hargreaves et al., 2009b, p. 2)

Leadership in Alberta Education was cognizant of the criticisms and commissioned an independent review by a team of internationally renowned educational researchers who were charged with investigating the value and impact of AISI. The research team found that, while it was difficult to measure the quantitative effect of AISI projects upon student achievement (especially as it pertained to standardized test scores), “AISI’s change architecture has led to clear shifts in the culture of teaching and improvement in Alberta. We found many instances of AISI influencing school and district policies in ways that represented a marked shift in understandings about teaching and learning at the school and classroom level.” (Hargreaves et al., 2009b, p.12). The research team subsequently made seven recommendations suggesting ways to improve the AISI program. The panel of international experts suggested that Alberta Education, together with the various school districts and other AISI partners:

1. *develop* improved ways of collecting and compiling provincial achievement data that will make it possible to trace the impact of complex but distinct initiatives like AISI;
2. *create* leadership and support systems for teachers and administrators involved in AISI projects to access existing data bases, request and receive data analysis services, and design their own instruments and indicators of accountability that are appropriate to their project goals;
3. *extend* AISI project content and processes towards greater involvement of parents, community members, businesses, universities and other partners;

4. *increase* AISI's attention to and impact regarding innovation and improvement in high schools, with particular reference to increasing Alberta's relatively low rates of high school completion;
5. *invest* in province-wide networks that cut across districts, that reach beyond annual conferences and that incorporate proven design principles of effective network architectures that have clear, positive impacts on system-wide outcomes for students;
6. *develop* leadership skill and capacity among all principals and district-level leaders so that the effectiveness of AISI projects does not suffer when existing leadership capacity in particular schools and districts is not strong;
7. *embed* AISI into Alberta Education as an integrated policy strategy. Do this without diminishing the attention, resources, advocacy and professional development regarding the distinctive approaches to professionally driven, locally adaptable and laterally networked processes of improvement and innovation that AISI has championed.

(Hargreaves et al., 2009a, p. 106, 107)

These recommendations were put into place as AISI completed its fourth cycle (2009-12) and began its fifth cycle (2012-15). The fifth cycle of AISI emphasized three priority areas: building research capacity, establishing collaborative cross-school authority AISI projects and networks, and fostering increased community engagement (AISI Education Partners, 2011, p. 2). However, in spite of these well-intentioned reforms, AISI experienced a round of funding cutbacks in 2011 (Couture & Murgatroyd, 2011) before having funding suspended altogether as of April of 2013 (ATA News, March 12, 2013). Financial and political realities had caught up to this long-standing improvement initiative and, like the budget cuts that affected teacher leadership in the late 1980s and 1990s, these cuts forced school boards to chop programs that relied on instructional leadership and direct a higher percentage of funding back to classrooms and classroom teachers.

Recent research on instructional leadership in Alberta.

In spite of its eventual demise in the spring of 2013, the thirteen years of AISI left a considerable legacy (Mayer & Townsend, 2013; Kuntz, 2013). This legacy includes a trove of educational data in the form of annual and final reports, and conference presentations. The work of AISI generated literature and research reviews from university researchers on specific topics such as high school completion (Gunn, Chorney & Poulsen, 2008), differentiated instruction (McQuarrie, McRae & Cutler, 2008) and student engagement

(Steinmann, Beauchamp, Kuntz & Parsons, 2013). In addition, there were several commissioned reviews of AISI as a viable approach to large-scale instructional reform (MacEwen, 2008; Hargreaves et al. 2009a; Parsons & Harding, 2011).

For the purposes of this study, the Alberta research done on leadership and education for school improvement is especially relevant. Although much of this work focused upon the role of the principal as an instructional leader (and not upon the instructional *teacher leader*), the findings and recommendations from several studies, especially as they correlate to instructional teacher leadership within shared and distributed leadership models, is informative and helps to set the context for this particular study.

In a review of leadership and sustainability strategies from AISI Cycles 1, 2, and 3, Foster, Wright and McCrae (2008) suggest that AISI helped to change the type of leadership required by principals in order to achieve success with instructional reform. According to the review, leadership for school improvement needs to build leadership capacity, align goals and create “buy in”, build common understandings and language in schools, practice and enhance distributed leadership, and provide access to ongoing and targeted professional development (p. 25). Based upon focus group interviews, the review also identified and ranked ten needs or concerns related to providing such leadership:

1. Integrating instructional innovation into classroom practice.
2. Addressing teachers and administrators workloads.
3. Managing multiple instructional innovations and school improvement initiatives simultaneously.
4. Supporting individuals and school staff with the change process.
5. Getting administrators to ‘buy-in’ to AISI project work.
6. Finding additional funding sources to sustain instructional innovation.
7. Involving students, parents, external partners, and other stakeholders.
8. Developing vision and strategies for implementation of educational innovation.
9. Selecting data collection and analysis tools.
10. Finding time to plan and organize for instructional innovation and to celebrate short and long-term successes. (Foster, Wright and McCrae, 2008, p. 26)

These identified responsibilities and concerns provided an important starting place for the interviews carried out in my study.

Another study, conducted by Parsons and Beauchamp, examined the leadership of five highly effective elementary schools (Parsons and Beauchamp, 2012a; Parsons and Beauchamp 2012b). This study, commissioned by the Alberta Teacher's Association, found that principals who wished to lead effective school reforms must give up "iconic and heroic" leadership status and practice shared leadership (Parsons & Beauchamp, 2012a, p.697). Highly effective school leaders influenced student learning by developing teacher efficacy in curriculum and instruction, engaging and motivating staff, fostering a shared purpose or vision, and creating a climate for effective learning through regular feedback, direction and communication. Among many other suggestions, Parsons and Beauchamp recommended that effective school principals communicate a clear vision and priorities, maintain a purposeful and meaningful focus, provide guidance as necessary, empower others to make significant decisions, establish supportive structures and provide necessary resources. While this study was focused on the principal as school and improvement leader, it provided insight into the conditions necessary for instructional teacher leadership, suggesting that instructional teacher leaders also need effective and shared leadership to be successful. Instructional teacher leaders need to be invited (not compelled) to take part of the leadership of the school (Parsons & Beauchamp, 2012a, p. 703) by a leader who is knowledgeable, trusting, respectful, caring, disciplined and decisive, community oriented, positive, exhibits high expectations, aware of innovations, and is "on the same page" in language and communication. (Parsons & Beauchamp, 2012a, p. 704-708). Parsons and Beauchamp's study of five effective principals informed this study, *Exploring the Experience of AISI Instructional Teacher Leaders*, by revealing some of the factors that may lead to ideal (or less than ideal) contexts for instructional teacher leadership.

One more study, "Action Research: The Alberta Initiative for School Improvement (AIS) and its Implications for Teacher Education", by Parsons and Beauchamp (2012c) reviewed data from four sets of final reports of action research projects submitted to

Alberta Education through AISI. While the study was focused on the implications for teacher education programs, it also revealed much about the kind of training and support needed for teachers (and instructional teacher leaders) who engage in school improvement processes. In their report, Parsons and Beauchamp (2012c) suggest twelve years of AISI and 1500 final reports from jurisdictions all across Alberta have led the authors to recognize that teachers are optimally engaged in their own professional learning:

1. When they are involved in active, site-based, action-research projects,
2. When these teachers implement pedagogies (inquiry, project-based learning, assessment for learning) that foster conversations about learning with their students and promote student engagement through real world connections, timely feedback, effective practices, and technological engagement.
3. When there are visible, tangible products of engaged learning such as: (1) creative and innovative learning cultures; (2) increased staff leadership capabilities; (3) sustainable, purposeful and value-driven changes; (4) increased student achievement through increased student engagement; and (5) increased job satisfaction.

However, while researchers like McEwan, Hargreaves, Parsons, Beauchamp, Foster, Wright and McCrae have all provided some insight into the role of the AISI Instructional Teacher Leader as part of a shared leadership model, their studies were more focused on school leadership and sustainability and professional learning models. I could not find any studies that actually reported on the experience of AISI Instructional Teacher Leaders. Instructional teacher leaders often played a central role in championing and enacting school improvement projects; they took on very demanding roles and experienced challenges that were unique to their position and mandate. I thought that the experiences of these leaders needed to be explored, documented and shared so that we might learn from both their successes and missteps.

A personal and professional interest.

My interest in researching and documenting the experiences of AISI instructional teacher leaders is not purely academic; it has both personal and professional underpinnings. The fact is I have had a long association with AISI.

In September of 2003 I took a position as a literacy consultant for Elk Island Public Schools. In that role it was my responsibility to oversee and implement an AISI project that was intended to improve student achievement by incorporating more strategic literacy practices into high school classrooms from all content areas. It was a daunting task; I moved from being a classroom teacher in a very small school to being the Literacy Guy (as the teachers soon came to call me) for over 250 teachers in 9 different high schools scattered over a large suburban/rural district. As I expected, the move from classroom teacher to instructional teacher leader made it necessary to learn much more about pedagogy and practice, current research and educational trends, and leadership. What I did not expect was that I would have to do just as much learning about initiating conversations, building trust, modeling practice, coaching colleagues and confronting weak practices. Thankfully I had support from our curriculum director and AISI coordinator. My director believed it was important consultants developed the requisite skills and aptitudes. She supported her team of AISI consultants (instructional teacher leaders) bringing in leaders from other school districts, sending consultants to workshops at the regional learning consortia and the Alberta Teachers Association, providing funding for professional resources and conference attendance, and providing opportunities to learn about consensus building, organizational planning, workshop delivery, and effective meetings management. For example, my fellow consultants and I were encouraged to:

- Learn how to organize and facilitate professional learning communities (DuFour & Eaker, 1998) through workshops and shared resources.
- Take workshops on “Cognitive Coaching” (Costa & Garmston, 2002) learning to engender trust, mediate and problem solve without directing or judging.
- Learn strategies to create, analyze and discuss data sets through “The Art of Focused Conversation” (Nelson, 2001).

- Learn how to make short and long-range improvement plans “Assessing Impact” of staff development (Killion, 2007) through workshops.
- Develop expertise in planning using "Understanding by Design" (Wiggins and McTighe, 1998), in order to support their colleagues.

Unfortunately, my experience as an instructional teacher leader and the support I received in Elk Island Public Schools was not necessarily the norm for other instructional teacher leaders around the province of Alberta. In Elk Island we were fortunate to have visionary leadership and district that was both big enough to support the development of an improvement team and yet small enough to sustain meaningful collaboration from most stakeholders.

In my first year as the EIPS AISI Senior High Literacy Consultant I worked with cross-disciplinary teams of teachers in nine high schools. We would meet regularly to discuss reading and writing issues in the classroom and I would present suggestions for how these issues might be addressed. I also visited classrooms to observe and provide some coaching. After that initial year, in response to requests from teachers in the schools who were not part of the literacy teams, I began to broaden the scope of the project so that every high school teacher in the district might get involved if he or she wanted to. This meant hosting district-level workshops that were focused on particular courses and featured specific literacy strategies. For example, we might have a workshop that looks at how teachers might use anticipation guides, highlighting, note-taking strategies, and discussion webs when working through a unit on Globalism in grade ten social studies. At the same time I continued to work with teachers in their schools and often did side-by-side coaching with teachers who were interested in trying strategies with their students.

My success in building relationships and sustaining meaningful professional learning led to a promotion when I moved to the AISI coordinator role for the next cycle of AISI (2006-2009). As the improvement coordinator for Elk Island Public Schools (more than 50 schools, 18,000 students and 1,000 teachers), I was given a significant budget and the responsibility to lead and sustain significant educational reforms to complete a very complex AISI project. With a team of consultants and part-time teachers, I learned about developments in assessment, differentiated instruction, inquiry, literacy and numeracy,

and educational technologies. Based upon our discoveries, the team and I designed meaningful and timely professional development; challenging teachers to become more reflective in their practice and ultimately helping students through strategies and support.

When the third cycle of AISI drew to a close, I took a position as an assistant principal at a busy K-9 school. In this role I experienced AISI as both a teacher and as an administrator. As an assistant principal, it was my job to support the lead teacher in our school and encourage the rest of the staff to work on AISI goals. As a teacher, it was my job to try many of the strategies suggested, collect artifacts, and share them when the lead teacher called us together. My stint as an assistant principal allowed me to experience AISI in a much different way than I had in the previous six years; I had to learn how to follow rather than lead.

My most recent experience with AISI instructional teacher leadership was as an AISI Research Partner (through the U of A, Faculty of Education). From September of 2011 until the conclusion of AISI in April of 2013 I worked with Dr. Jim Parsons to help district coordinators and directors plan and assess their improvement projects. We also provided workshops around Alberta for district leaders on research and data collection methods. As an AISI Research Partner I was able to share what I had learned about instructional teacher leadership, project planning, project delivery and reporting with AISI coordinators from all around the province. At the same time, I learned from their experiences and I would often try to connect like-minded educational leaders from various districts so that they could learn from each other.

My experiences with AISI as a literacy consultant, instructional coach, AISI coordinator, school administrator, and AISI research partner galvanized my commitment to instructional leadership, teacher collaboration and shared leadership practices. I became a regular presenter at AISI conferences and at local teacher conventions where I espoused the value of teacher leadership and advocated that teacher leaders move from being knowledge disseminators to become professional learning facilitators embracing a model originally espoused by Joyce and Showers (1988) wherein real instructional change (transfer thinking) is facilitated by classroom coaching, demonstration and guided practice.

At the same time, my work with AISI allowed me to meet many other instructional teacher leaders from districts all around Alberta. It struck me that each of the teachers that I met had experienced very different situations, expectations, support, success and setbacks—and yet we all had something in common. Teachers who had taken on the challenge of instructional teacher leadership seemed to have an allegiance and understanding with each other that transcended their unique situations. I was interested in investigating this curious circumstance further. What was it that instructional teacher leaders shared? How did their experiences shape them as teachers and leaders? And what can we learn from the experiences of AISI instructional teacher leaders?

Studies on the Experience of Instructional Teacher Leadership

My interest in learning more about the experiences of AISI instructional teacher leaders led me to consider that the experience of the instructional teacher leader—the change agent who must rely upon kinship and credibility to affect change— has not been fully explored. While there are International and North American studies and publications that focus on the purpose, role, and characteristics of teacher leaders who engage in instructional reform, until lately, few research studies have examined the day-to-day world of the instructional teacher leader. A close examination of real life accounts of instructional teacher leaders charged with leading and supporting a change process could provide insight into the nuances of building relationships, establishing trust, providing feedback, dealing with skepticism, and sustaining successful improvement initiatives. The next section describes some recent studies that have investigated the experiences of instructional teacher leaders and how these studies have informed my study. For purposes of organization I have grouped the studies into two sections: quantitative studies and qualitative studies.

Quantitative research on the instructional teacher leadership experience.

In the past five years, a number of quantitative studies have examined the role, relationships, and perceptions of instructional teacher leaders (Angelle, et al. 2011; DeVilliers and Pretorious, 2011; Angelle and DeHart, 2011). Several studies helped clarify the delicate relationship that instructional teacher leaders were expected to maintain as

they sought to provide support to their colleagues while at the same time encourage instructional change and improved student achievement. Most of these quantitative studies endeavoured to better understand the experience of instructional teacher leaders through Likert-scale type responses to a series of related questions. The studies revealed that teacher leadership was dependent upon collective efficacy, trust building and service (Angelle, et al. 2011; DeVilliers and Pretorius, 2011; Angelle and DeHart, 2011). What follows is a summary of these quantitative studies.

De Villiers and Pretorius (2011) explored how educators viewed teacher leadership and whether or not they were ready to embrace teacher leadership roles and a more democratic distributed leadership structure. The research took place in South Africa and involved 283 educators from the Western Cape. These educators included teachers, principals, administrators, district officials, and members of school management teams. The research was conducted using a series of questionnaires including a self-survey of leadership perceptions, a “Framework of Assumptions”, and a “Teacher Leadership Readiness Instrument” (Katzenmeyer and Moller, 2009). The researchers also considered needs assessments and demographic information. In constructing the instruments, De Villiers and Pretorius drew heavily upon the work of Crowther et al. (2009) and Katzenmeyer and Moller (2009). Participant responses were categorized according to role and experience and then analyzed according to specific research questions related to assumptions, readiness and professional development needs. The findings revealed that the majority of participating educators were ready for a more democratic, distributed leadership model in the schools and that there was an appetite for more professional development in this area as teachers grew in experience and confidence. DeVilliers and Pretorius (2011) did not speak directly to instructional teacher leadership and the educational context was different from the Albertan context and AISI experience; nevertheless, the study revealed more acceptance of teacher leadership within the educational community, more desire by teachers to lead in this way, and that the current climate is right for opening up classrooms and participating in shared leadership. In addition to revealing the disposition of teachers towards shared leadership, the DeVilliers and Pretorius study evoked questions for further research including: “How do you create

conditions that invite teachers to become instructional teacher leaders?” and “What might motivate these teachers to accept these invitations?”

In 2011 Angelle, Niles, Norton, and Nixon reported the results of a multi-site quantitative study they conducted on teacher leadership. This study took place in two school districts in southeastern America. The data was collected through a Teacher Leadership Inventory, an Omnibus T-Scale, and a Teacher Collective Efficacy Belief Scale. After several high schools dropped out of the study, the final survey sample consisted of ten schools (3 elementary, 3 middle, 1 secondary, 2 K-12, and 1 K-8). According to Angelle et al., “a strong collective efficacy of staff is indicative of belief in their ability to meet their goals and achieve their mission.” (p. 17) Their study revealed that collective efficacy, effective teacher leadership, and trust are directly linked; where all three are in evidence there are tangible results in terms of student achievement. Furthermore, teachers who believe in the capacity of the faculty and who feel collectively responsible and accountable for student achievement believe in themselves, expend a greater effort, and persist in their work for school improvement. The authors recommended incorporating leadership development for teachers as part of their training, and changing the culture of the school to incorporate more shared decision-making and leadership to promote more ownership, agency, and capacity in improving student learning.

Angelle, et al. (2011) provided starting points for further research. Building upon the findings from Angelle, et al. researchers may ask:

- What kind of leadership training would be most beneficial to aspiring instructional teacher leaders?
- How does a successful instructional teacher leader create trust and build collective efficacy?
- How does an instructional teacher leader maintain professional relationships and at the same time build in accountability and change related to student achievement and growth?

Angelle, Niles, et al. acknowledged these unanswered questions and recommended extending their research to include more qualitative insights through interviews to

examine teacher perception and understanding about teacher leadership and especially its relationship to staff efficacy, a culture of trust, and the impact on student achievement.

In a similar study, Angelle and DeHart (2011) examined teacher perceptions as they relate to teacher leadership and if these perceptions might differ according to school level (elementary, middle and high school), degree level (bachelor, master's or master's plus), or leadership level (teacher or administrator). Angelle and DeHart's (2011) extensive study was based upon a collection of data from two different administrations of a survey in 43 schools over 7 states. The 672 participating teachers completed a Teacher Leadership Inventory developed by the authors involving two separate administrations of a four-point, Likert-type scale survey. Findings indicated that there were significant differences in perceptions of teacher leadership between elementary school teachers and middle/high school teachers, between teachers with a bachelor's degree and teachers with graduate degrees, and between formal teacher leaders and teachers in no leadership position. Angelle and DeHart (2011) assert that "principals cannot hold the expectation that teacher leaders will "step up" if they are interested in leadership" and that administrators need to provide professional development, opportunities to strengthen teaching skills. They must also develop special relationships with their teacher leaders and practice shared leadership even in the face of growing demands for accountability and the temptation to revert back to more top-down leadership models (p.155).

This study revealed some of the underlying tensions associated with teacher leadership for pedagogical change especially as it is impacted by context (school level), credibility (educational level) and power (leadership level). The study from Angelle and De Hart (2011) correlates with many of the AISI project reports; the success of teacher leaders is often dependent upon these three factors. Angelle and DeHart (2011) pointed to the need for on-going training in instructional leadership, the need to provide opportunities for dialogue and professional learning, the need for expertise to become common practice, and the need for teacher leadership to be nurtured and supported. These four needs merit additional exploration and evoke questions for further research that could be explored further in this study of AISI instructional teacher leaders. In my research I was interested in learning:

1. Just how does the school context affect the experience and relative success of the instructional teacher leader?
 - a. Is there a difference when instructional teacher leaders work in rural, urban, or suburban schools?
 - b. Is there a difference when instructional teacher leaders work with faculty they have already been a part of?
 - c. Is there a difference when instructional teacher leaders work in a building with the support of the principal, with only the awareness of the principal or *despite* the principal?
2. How does an instructional teacher leader gain credibility with the staff they are working with?
 - a. How much does recent experience in the classroom count?
 - b. How much do professional/academic qualifications impact the credibility and acceptance of the instructional teacher leader?
3. How does an instructional teacher leader negotiate their role within the school, value, and validate the work of the staff and administrators and avoid betraying confidences or shirking responsibilities?

Akert and Martin (2012) also researched the role of teacher leadership in school improvement, they gathered the perceptions of fifteen principals and ninety-six classroom teachers in a Midwestern state. Their study utilized an electronic survey for data collection. The data collected revealed that teachers and administrators perceive the level of involvement and the impact of teacher leaders upon school improvement quite differently. Akert and Martin reinforced Angelle and DeHart's (2011) findings, especially with regard to the need for principals to take a lead in understanding the power of teacher leadership and of having a shared leadership structure. Based upon this research, Akert and Martin recommended that principals embrace teachers as leaders, seek to understand teacher motivation and any school contexts that may discourage teacher leadership, and find ways to encourage more teachers to step into leadership roles. To assist principals in this process, Akert and Martin suggested increased and improved communication, training about how to cultivate teacher leadership, and collaborative work in which principals and

teachers define the role and mission of the teacher leader and shape the culture of the school. According to Akert and Martin, once these three suggestions are put into place, teachers who are willing to become teacher leaders will find opportunities to build networks, collaborate with fellow teachers, and engage in professional learning to enhance student achievement.

Like Angelle and DeHart (2011), Akert and Martin (2012) focused primarily upon the relationship between the principal and the teacher leader and the varying perceptions of how teacher leadership may look and perform in a school. However, Akert and Martin's study did further inform the research base on instructional teacher leadership by:

- Identifying many different teacher leadership roles (although many of these roles were related to administrative teacher leadership; buying textbooks, setting promotion and retention policies, etc.).
- Acknowledging and verifying the administrative tensions that sometimes underlie the teacher leadership position (power struggles with administration or staff, administrative engagement and leadership, appropriate levels of support from the principal, etc.).
- Providing quantitative data in support of a shared or parallel leadership model and the creation and support of teacher leadership roles to improve teaching and learning.

Qualitative/mixed method research on the instructional teacher leadership experience.

While the aforementioned quantitative studies provided information about dimensions of instructional teacher leadership; readiness for such leadership (Devillers and Pretorius, 2011), ideal contexts for instructional leadership (Angelle, Niles, et al., 2011), the importance of support, credibility and training (Angelle & DeHart, 2011), and the need for administrators and instructional teacher leaders to work together in shared or parallel leadership structures, these studies also left many questions unanswered and prompted even more questions about the motivations, the challenges, and the rewards of taking on instructional teacher leadership. Quantitative studies on teacher leadership had difficulty in providing rich of detail in order to answer "how" and "why" questions:

- Why and how do instructional teacher leaders move into this leadership role?
- How do they figure out/negotiate their new contexts and roles?
- How do they balance the interests of their colleagues, the school and themselves?
- How do they deal with adversity?
- How do they experience success?
- Why do some teacher leaders persevere and flourish in the position while others move to different roles?

Fortunately, several researchers have attempted to answer some of these questions through qualitative and/or mixed method research. Using narrative inquiry, Cortez-Ford (2008) examined the individual journeys of nine elementary school teachers who were, at that time, moving into teacher leadership. Cortez-Ford's narrative study was concerned with learning how each of the teachers built and then adjusted to their new teacher leader identity. To answer this research question, Cortez-Ford asked teachers to write four autobiographical narratives in answer to the questions: "Who am I?", "Where am I?", "How do I lead?", and "What can I do?" From her analysis of these leadership narratives, Cortez-Ford was able to suggest four different templates that help describe these teachers' respective journeys into teacher leadership: as member, as servant, as model, and as change agent.

Most significant in Cortez-Ford's findings was the fact that each teacher underwent a process of "straddling the line" (Mishler, 1999) while they grew into their roles. These beginning teacher leaders felt pulled by opposing forces related to identity, leadership, and practice. Only in reconciling these forces were they able to achieve success. Specifically, these new teacher leaders had to find ways to connect their personal and professional selves, they had to reconcile traditional models of leadership with the shared leadership model they were espousing, and they had to construct new understandings of teaching and leading practice (Cortez-Ford, 2008, p. 187).

In another recent study, Norris (2010) examined the experiences of three teacher leaders in the context of high school reform. Norris asked three teacher leaders to participate in in-depth, semi-structured interviews. The primary interview questions were:

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

2. What have been your experiences as a teacher leader?
 3. What circumstances or conditions have influenced or shaped your experiences of being a teacher leader?
 4. Think of a specific instance, situation, person, or event from your experience as a teacher leader. Then explore and describe the whole experience to the fullest.
- (p. 68)

In reviewing the transcripts and conducting phenomenological reductions, Norris (2010) was able to identify five emergent themes: (1) grappling with teacher leadership identity, (2) facing the uncertainties of sustaining the reform initiative, (3) negotiating the tensions between management and leadership, (4) experiencing challenges of leading, and (5) feeling the empowerment of success. (Norris, 2010, p. 3)

According to Norris (2010), participants made sense of their experiences in four ways: through (1) learning, (2) communicating, (3) doing, and (4) reflecting. Norris asserted that teacher leadership is shaped and identity formed when teacher leaders make sense of their experience, learn from it, and act in response to their learning. How they do this depends greatly on their own individual persona and on the situation in which they have been placed. Pivotal to this professional reflection and adaptation was the provision of time; teacher leaders must be given time to reflect on and discuss their experiences as they perform their roles (Norris, 2010, p. 169). Norris also recommended further investigation into the aspirations of teacher leaders, their relationships with administrators, and their place in the leadership succession of districts.

Cortez-Ford's (2008) research and the research from Norris (2010) come from very different contexts—one involved elementary teachers in American schools with informal leadership roles and the other studied three high school teachers from one school in Saskatchewan trying to implement a change initiative. The Albertan context— with the pressure of large-scale reforms, three-year cycles, targeted and accountable funding, and an emphasis on knowledge dissemination and research— provided a different context for research into the dimensions and experience of instructional teacher leadership.

Both these qualitative studies, one based on narrative inquiry (Cortez-Ford, 2008) and the other based on transcendental phenomenology (Norris, 2010), gave rich accounts of the lived experience of teacher leaders. In each case, the researcher's intention was not to generalize or draw conclusions that prescribe a plan of action. Instead, each sought to

provide a glimpse into the world of the teacher leader and raise awareness of the challenges these people might face. Indeed, for each of these studies it was difficult to come away with specific assertions or lessons. In particular, the conclusions from Norris's work, suggesting that teacher leaders develop through learning, communicating, doing, and reflecting, are rather broad and nonspecific. Nevertheless, both studies provided insight into the world of the teacher leader. From these studies comes an understanding of how teacher leaders cope as they work or "straddle the line" as Mishler (1999) calls it, how to develop a teacher identity, and how to choose the role (mentor, servant, model or change agent) that best suits their educational context.

Another equally informative study on teacher leadership was completed in 2010 by Salazar. Recognizing that, within the field of school improvement, there was an emphasis on shared leadership and the need to build leadership capacity in the schools but also recognizing that there was not enough research and data about the kind of learning culture needed in order to facilitate such leadership, Salazar (2010) conducted a mixed methods study to investigate "the roles and functions of teacher leaders and to identify specific norms, habits, and structures that supported or inhibited the development of teacher leadership within this highly challenged environment." Salazar specifically targeted four secondary schools and, by administering the Teacher Leadership School Survey (Katzenmeyer & Moller, 2001) and analyzing three years of student achievement data, he was able to determine which of the four secondary schools exhibited both the strongest presence of teacher leadership and the greatest progress towards school improvement. Once this finding was determined, Salazar (2010) used case study methodology to investigate the most successful school more closely. Salazar's research aligned with previous research that maintained the importance of the principal in creating a climate conducive to instructional teacher leadership - a climate that included shared accountability, engendered specific norms of practice, and squarely addressed student challenges related to performance and achievement. Based upon his understanding of the work of Katzenmeyer and Moller (2001) and confirmed by his research, Salazar was able to advance a 'Teacher Leadership Theoretical Framework' that describes how instructional teacher leaders influence both faculty and student improvement. In his framework student

learning and teacher practice are supported by four interactive influences: school culture, norms of practice, teacher leadership, and communities of practice. (Salazar, 2010, p. 50)

Salazar's framework illustrated just how important it is that instructional teacher leaders work within a shared or distributed leadership structure; establish norms of practice together with the rest of the faculty and with the support of administration; show respect, build trust, model professional learning, and lead through service; and, foster communities of practice and engage in professional collaboration (Salazar, 2010, p. 49). Salazar's research confirmed much of what has been written about the role of instructional teacher leaders and the conditions that foster effective instructional leadership. In his findings, Salazar (2010):

- reiterated the importance of establishing a supportive culture for teacher leadership built upon shared or parallel leadership, collegiality, open communication and a developmental focus (p. 137-139);
- gave evidence of how establishing norms of practice allowed teachers to meet regularly and engage and empower teachers (p. 140);
- stressed the importance of engaging in ongoing and purposeful conversations based upon data and open classrooms (p. 141);
- reinforced the need for effective collaboration as a vehicle for school improvement, (p. 141- 142);
- acknowledged the importance of having a faculty that is willing to engage and participate in teacher-led reforms (p. 143);
- suggested that teacher leaders must work towards forging new working relationships with colleagues and administrators – relationships that encouraged “courageous conversations” about practice and student results (p. 143-144); and,
- recommended that schools move to become “communities of practice” using Professional Learning Communities to “create a safe haven for discussion” and give all teachers a place to share their instructional expertise, extend their focus beyond content delivery, and voice their concerns and possible solutions. (p. 147-149).

Salazar (2010) also identified barriers that might prevent teachers from taking on teacher leadership roles, these included:

- union contracts which entrench traditional models of leadership and leadership incentives;
- a lack of administrative direction and continuity due to the “revolving door” syndrome in school leadership;
- district mandates and personnel which conflicted with or interfered with site-based changes; and
- a lack of leadership training. (p. 150-153)

As well as confirming much of what had previously been cited in the literature as processes that encourage and support teacher leadership, Salazar (2010) related examples where the school culture and the principal’s leadership worked against effective teacher leadership. These examples included instances where:

- attempts to open classrooms and promote peer observations were rebuffed due to a “lack of trust” and the feeling that teacher leaders were administrative spies;
- a culture of deficit thinking amongst the staff (not all kids can achieve) held back meaningful reform;
- low morale due to impending lay-offs and budget cuts impacted PLC work; and
- administrative turnover affected teacher sense of autonomy and empowerment. (p. 154-157)

Salazar (2010) showed that teacher leaders need to be integral parts of a shared leadership culture and it documented and unpacked many of the supports necessary to ensure success for aspiring teacher leaders. Unfortunately, Salazar’s research did not deal with how a teacher moves into teacher leadership; how teacher leaders build trust and establish relationships; how teacher leaders negotiate their roles and cope with challenges; and, how teacher leaders reflect upon their work, take ownership of it and make adjustments.

Salazar’s research (2010) and his Teacher Leader Theoretical Framework have significantly contributed to an understanding of instructional teacher leadership and the pressures associated with it. In addition to Cortez-Ford (2008) and Norris (2010), Salazar (2010) provided an effective starting point for further research into the experience of the instructional teacher leader.

Dimensions of the instructional teacher leadership experience for inquiry.

The studies listed in the previous section were global investigations of the instructional teacher leadership experience. In addition to these studies there have been many more studies that have investigated specific aspects related to teacher leadership that includes advocacy for school improvement. For the purposes of this study, I decided that, in addition to looking at the AISI instructional leadership experience as a whole I would also specifically target six certain dimensions of that experience. These dimensions were:

1. Teacher **motivations** for moving into instructional teacher leadership;
2. The **qualities** that instructional teacher leaders need;
3. The typical **roles** and tasks of instructional teacher leaders;
4. The **challenges** associated with instructional teacher leadership;
5. The kind and level of **impact** that instructional teacher leaders feel they have; and
6. The **optimal conditions** in which instructional teacher leadership may flourish.

Instructional teacher leadership motivations.

According to Mayers, Zapeda and Benson (2013) teachers move into instructional teacher leadership for themselves and for others. The authors say that this two-fold call is influenced by a number of factors including the need for personal challenge, the opportunity to give service to the profession, and the intrinsic and extrinsic rewards that come from helping others “see the big picture” (Mayers, Zapeda and Benson, 2013, p. 5,6). Margolis and Deuel (2009) suggest that the intrinsic and extrinsic rewards may include moral imperatives and monetary rewards as well as personal and professional concerns. However, while the position of instructional teacher leader may seem enticing, the role is challenging and not every teacher is suitable for building capacity and sustaining long-term deep transformation (Killion, 2011). Mayers, Zapeda and Benson suggest that certain educators are more ready for teacher leadership than others and this readiness is tied to respect, confidence, credibility, desire, risk-taking and a sense of responsibility (2013, p. 7). Further to this idea of suitability, the authors suggest that prospective teacher leaders take AIM before they jump into instructional leadership; they should consider their acumen for the position (adeptness at personal relationships and informal leadership), their interest in the position (willingness to engage in intense learning through professional development

and research), and their motivation for the position (service, validation, respect, career development, etc.).

For my study of AISI Instructional Teacher Leaders, I was also very interested in learning more about the motivations and aspirations of educators who take on this role. In my experience as an AISI Coordinator and as an AISI Research Partner I had met many different instructional teacher leaders and often the topic of why they chose to take on the role had come up. The instructional teacher leaders that I had met shared many different reasons for choosing to become coaches, consultants and lead teachers—personal, professional and financial. Some of the people I talked to shared that they had not made the choice to become AISI instructional leaders; they had been selected and encouraged to *step up and make a difference*. And when I considered why I had chosen to take on the role, I found that it was not so easy to pinpoint just one factor. For my part I believed that teachers took on the formal position of instructional teacher leader due to a confluence of circumstance, interest, duty, aptitude, credibility and choice. I was eager to use the interviews to test my view and learn more from the ten instructional teacher leaders in my study.

Instructional teacher leadership qualities.

From the literature, it is possible to see many shared character traits of effective teacher leaders. Norris (2010), after comparing writings from Leithwood et al. (2007), Lieberman and Miller (2004), Patterson (2001), and Rosenholtz (1989), advanced a list of common attributes helpful to those aspiring to be teacher leaders. According to Norris (2010), teacher leaders must possess more than expertise and drive to be successful. Norris asserted that teacher leaders need to be professional, knowledgeable, enthusiastic, committed, willing to take risks, adaptable, respectful, organized, experienced, effective in communication, willing to be criticized, a problem solver, outspoken, a lifelong learner and humble. Norris' list is formidable; it speaks to an ideal that instructional teacher leaders might aspire to— rather than a realistic checklist of competencies from which to measure their own success. Norris's list alludes to a “negotiation of roles and identities” the teacher leader must go through. Characteristics or qualities such as: willing to take risks, willing to be criticized, problem-solving, and adapting to the situation, all speak to the flexibility that

teacher leaders must have. Other qualities such as enthusiasm, commitment, and advocacy show that teacher leaders must also be passionate and uncompromising, especially where student learning is at stake.

Humility, the last quality in Norris's list, is one of the most critical elements. Teacher leaders who have tried to promote change but failed to build open and honest relationships faced skeptical colleagues, closed doors, and frustration (MacEwan, 2008, p. 19). In contrast, teacher leaders who forged honest relationships and displayed many of the qualities Norris identified positively impacted their colleagues, student achievement, and engagement. Coupled with humility is the willingness to take risks, the willingness to publicly share setbacks and disappointments. As Pate, James, and Leech (2005) point out, effective teacher leaders are most powerful when and because they have taken the risk of leaving the safe confines of their classrooms and have put themselves into a vulnerable position as a role model for both teachers and students. Teacher leaders, by connecting with colleagues in a collegial way, can affect change in a way administrators might not. These educators show, in their walk and talk, that they are life-long learners willing to listen and learn and willing to share what they have learned. When teacher leadership is practiced well, there is a sense of hope and encouragement and classroom teachers feel that they can accomplish great things (Pate, James & Leech, 2005).

Drawing upon literature beyond education research, Bowman also wrote about teacher leadership qualities. Bowman (2004, p.188) cited a leadership study by Bennis and Thomas (Geeks and Geezers, 2002), to explain that "true" teacher leaders, like all successful leaders, must exhibit four important qualities or abilities: (1) displaying adaptive capacity, (2) engaging others in shared meaning, (3) employing a compelling and distinctive voice and (4) showing integrity. Central to this "true" leadership is adaptive capacity or the ability to recognize and respond to varying contexts as teacher leaders promote change and professionalism. Adaptive capacity implies being flexible to situations and demands, providing encouragement and validation to colleagues, and establishing trust. This flexibility, or negotiation of roles and processes, is crucial when instructional teacher leaders meet roadblocks in their efforts to lead for school improvement.

Adaptability and flexibility are important if instructional teacher leaders are expected to practice a type of “servant leadership” in which they support their colleagues and students by anticipating their needs and by aligning their actions with the overall mission and vision of the school (Portner & Collins, 2014, p.104-105). Portner and Collins described three important dimensions of servant leadership: (1) a moral component, (2) a focus on shared success, (3) an emphasis on individual growth and development (Portner and Collins, 2014, p. 105 citing Walumba, Hartnell and Oke, 2010). If teacher leaders are prepared to encourage, collaborate, empower, and trust, and if they willing to put the needs of their colleagues ahead of their own, they will have a better chance at success. But such servant-leadership would require a great deal of patience, persistence, and humility. In addition, such servant leadership would necessitate a commitment to be present (aware, available, and in the moment), real (authentic and honest), and responsible, to “infuse and energise” schools (Starratt, 2004).

For the purposes of my study I wanted to compare the rather idealized list of qualities found in Norris’s list to the lived realities of AISI instructional teacher leadership. Obviously not every consultant, coach, or lead teacher would display all of the qualities that Norris (2010) and the others had listed. So which of the qualities might be most important? And how do instructional teacher leaders who, by their own admission fall short of some of these ideals, still manage to build effective relationships and sustain engagement in school improvement projects? In addition I wanted to investigate the themes of “adaptability” (Bowman, 2004), “risk-taking” (Pate, James, and Leech, 2005) and “servant leadership” (Portner & Collins, 2014) that were suggested by the literature to see if the most important quality of instructional teacher leader is this person’s willingness to take action, often courageously and selflessly, while championing change.

Instructional teacher leadership roles.

Barth (2001) wrote that teacher leaders are often the “decisive element” in their school - helping maintain the health of the school through many different facets of leadership. (Barth, p. 444) Teacher leaders influence morale and participation of the staff and help teachers feel like they have some ownership over the mission and direction of the

school. Of course, just how these leaders influence the health of the school is highly dependent upon the roles that they play.

Instructional teacher leaders must use professional judgment to champion change that supports their school's mission and improvement goals. With a variety of actions or roles to choose from, instructional teacher leaders are faced with an incredibly complex and challenging task. Just how these instructional teacher leaders build capacity and catalyze change is highly dependent on situation and purpose (Angelle & Schmid, 2007; Feeney, 2009; Reeves, 2008; Katzenmeyer and Moller, 1996). Instructional teacher leaders must adapt for various contexts: rural, urban, small school, large school, inexperienced staff, accomplished staff, schools in crisis, school performing exceptionally well, etc. Even when they are working in what may appear to be a rather straightforward context or homogeneous staff, instructional teacher leaders must realize that one size does not fit all and that many different ways to effectively support teachers exist. The instructional teacher leader's responsibility is to find the right combination for the colleague or colleagues they are working with at that time. This charge implies that an instructional teacher leader must do a great deal of inner work as they constantly reflect on their progress in challenging their colleagues and themselves to improve student learning.

A number educational researchers and scholars have advanced conceptions or frameworks that describe the various roles and responsibilities that teacher leaders who work in school improvement must consider and deftly fulfill. Some of the more notable frameworks of instructional teacher leadership roles are those of:

- Crowther et al. (2002), who developed a "Teachers as Leaders Framework" with six elements describing how instructional teacher leaders exercise influence in their school communities;
- Harris (2002), who described the role of the teacher leader/change agent in terms of four different leadership dimensions or responsibilities;
- Danielson (2006) who laid out a concrete list of actions for instructional teacher leaders; and
- Killion and Harrison (2007) who proposed: "Ten Roles for Teacher Leaders".

A matrix comparing the four different frameworks describing instructional teacher leadership roles and responsibilities is on the next page.

Table 1: A Comparison of Instructional Teacher Leadership Roles and Responsibilities

Six important leadership actions...	Crowther et al. (2002) “Teachers as Leaders Framework”	Harris (2002) Leadership Dimensions	Danielson (2006) Actions for Teacher Leaders	Killion & Harrison (2007) “Ten Roles for Teacher Leaders”
1. Inspiring teachers, championing reform	1 - Conveying convictions about a better world	2 - Engaging and empowering: inviting colleagues to take ownership of the change or development	<ul style="list-style-type: none"> Mobilizing people around a common purpose 	<ul style="list-style-type: none"> School Leader Catalyst for Change
2. Connecting theory and practice/ clarifying goals	5 - Translating ideas into sustainable systems of action	1 - Guiding and interpreting: translating the principles of school improvement into the practices of individual classrooms	<ul style="list-style-type: none"> Using evidence and data in decision making 	<ul style="list-style-type: none"> Data Coach
3. Modeling strategies and resources/ showing credibility	2 - Striving for authenticity in their teaching, learning, and assessment practices		<ul style="list-style-type: none"> Contributing to a learning organization. 	<ul style="list-style-type: none"> Learner
4. Engaging the faculty /working in the classrooms with teachers and students	3 - Facilitating communities of learning through organization-wide processes	3 - Mediating and supporting: providing insight and expertise, additional resources, and external assistance	<ul style="list-style-type: none"> Marshalling resources and taking action Recognizing an opportunity and taking initiative 	<ul style="list-style-type: none"> Resource Provider Instructional Specialist Curriculum Specialist Learning Facilitator
5. Problem solving/ facing challenges related to organization and relationships	4 - Confronting barriers in the school’s culture and structures		<ul style="list-style-type: none"> Sustaining the commitment of others and anticipating negativity 	<ul style="list-style-type: none"> Classroom Supporter Mentor
6. Sustaining the initiative/ reflecting on the bigger picture and aligning the work with the project mandate	6 - Nurturing a culture of success	4 - Collaborating and connecting: forming professional (and personal) relationships and networks for professional growth	<ul style="list-style-type: none"> Monitoring progress and adjusting as conditions change; 	

Crowther’s framework (2002) provides a mission for instructional teacher leadership.

The six elements in Crowther’s framework convey general goals or even mission statements that

most, if not all, instructional leaders share. Harris's 'leadership dimensions' (2002) speak more to the daily work of the instructional teacher leader; the dimensions describe ongoing and inter-related actions that are vitally important in sustaining interest and growth in a school improvement process. The element of change is foundational Harris's list. Danielson's list (2006) aligns with both Crowther's mission and Harris's four elements of teacher leadership. In fact, both Crowther et al. and Danielson's lists seem to be rallying cries; the actions they set out speak to the challenges or battles that an instructional teacher leader might anticipate. The verbs employed in both lists evoke militaristic or interventionist language. The list from Crowther et al. implored teacher leaders to hold fast to their idealism, to strive, confront, and create systems of action. Danielson's list was similar in that it asked teacher leaders to be very strategic, looking for and recognizing opportunities to advance their cause and calling them to mobilize, marshal, monitor, sustain, and contribute to the greater good. In contrast, Harris's list focuses much more on interaction and relationship building. Verbs like guiding, empowering, mediating, supporting, collaborating and connecting indicate more of a two-way relationship that involves negotiation and collaboration. At the same time, Harris' focus always remains squarely upon change and reform.

The fourth framework I considered was from Killion and Harrison (2007) who proposed: "Ten Roles for Teacher Leaders". Killion and Harrison's list focused more upon specific roles or job titles that could be named and delineated from one another (data coach, resource provider, etc.). This list was often referred to by people working in AISI projects and used as a reminder that not every instructional teacher leader needed to lead in the exact same way. During the tenure of AISI, Killion made several visits to Alberta to conduct workshops on leading for educational change and she reinforced the need to adapt your approach depending on the needs of the students, teachers, and district.

The dominant theme in all four lists, is that the central role or guiding purpose of an instructional teacher leader is to be a change agent. There may be many facets to this role but all of the elements, dimensions, actions, or supporting roles point towards instructional reform and school improvement. Killion (2011) emphasized this focus on improvement and reinforced it as the most important function of a teacher leader:

Teacher leaders have a single guiding purpose— to build capacity in others.
They use their talents to influence, shape, support, and catalyze change that

results in increased student achievement. Their actions reveal their fundamental belief that the more they build capacity in others, the more they contribute to sustaining long-term, deep transformation that allows others to address today's challenges and to be prepared for facing those that arise tomorrow. (p. 11)

In comparing the four different conceptions, I was able to identify six important leadership actions that I considered important for AISI instructional teacher leaders when they were charged with advocating for change in pedagogy and practice. These six leadership actions were:

1. Inspiring teachers and administrators and championing the project;
2. Clarifying the goals of the project by connecting theory to classroom practice;
3. Establishing credibility by modeling strategies and providing useful resources;
4. Collaborating with teachers inside and outside their classrooms;
5. Facing challenges and problem solving; and
6. Sustaining the initiative by reflecting on the bigger picture and constantly aligning the work with the project mandate.

I assumed that all ten of the instructional teacher leaders would have experiences in leading for change in these six different ways and I looked forward to hearing just how they had done so. I knew that their stories and insights would certainly benefit anyone who was considering the role of instructional teacher leader or who was involved in leading for change.

Instructional teacher leadership challenges.

Many challenges are associated with teacher leadership. Barth lists four impediments to teacher leadership (Barth, 2001, p.445, 446): *(1) There are too many tasks in the job description.* The "opportunity" for school leadership always seems to be an add-on. *(2) There is not enough assigned time to tackle the change.* Time in the school is carefully meted out; each minute is counted as administrators balance the requirements from the department of education with those stated in teacher contracts. *(3) There is the constant pressure of accountability for the instructional change and assessment of it.* The added stress of knowing someone is using test scores to measure success as a teacher leader is just one more thing for an educator to worry about. *(4) Teacher leaders must deal with reluctant or*

resistant colleagues. Barth explains that the greatest obstacle to teacher leadership often comes from colleagues; colleagues can demonstrate opposition in bizarre and often wearying ways.

Barth further explains the challenge for aspiring teacher leaders to even accept or display leadership: “The persistent array of means teachers employ to sabotage the best intentions of others is daunting and discouraging. Many teachers are perplexed and discouraged by the unfriendliness of their school’s culture and by how quickly their leadership leads to their ostracism” (Barth, 2001, p. 446).

Straddling the line and providing hard feedback. Perhaps the most challenging issue for teacher leaders is the fact that they must “straddle the line” (Mishler, 1999). Instructional teacher leaders are to be seen both as teachers and as leaders (Mangin & Stoelinga, 2011, p. 49). They need to keep one foot grounded in the classroom while the other is firmly planted in the world of educational theory, research, and improvement. New instructional teacher leaders can feel pulled by opposing forces related to identity, leadership, and practice. This dual obligation to teaching and leadership can cause resentment and mistrust as teachers feel that their colleague (teacher leader) may have slipped into a management and supervisory role.

What makes “straddling the line” even harder is providing timely and “hard feedback” while continuing to maintain healthy relationships (Mangin & Stoelinga, 2011, p. 49). Being cognizant of their own limitations, teacher leaders often struggle with confronting inadequacies or deficiencies in the practice of their colleagues. In addition the “egalitarian ethic” amongst teachers and the fact that many teachers do not like being told what to do can make it even more difficult to provide critical feedback (Lieberman & Miller, 2004). Implementing change through instructional teacher leadership can often conflict with “a teacher culture that does not easily acknowledge that a colleague may have knowledge to share” (Katzenmeyer & Moller, 2001, p. 8). In fact, this challenge often keeps teachers from volunteering or applying for teacher leadership positions (Bowman, 2004, p.187); the personal risks associated with tackling hard and transformative issues are just too great. Mangin and Stoelinga claim that some (instructional) teacher leaders, in an effort to maintain relationships with staff, actually downplay their expertise and devalue the

educational initiatives they are supposed to be championing. They explain this predicament:

The nonsupervisory nature of the teacher leader role creates a paradoxical challenge for the teacher leader. In an effort to gain teachers' trust, teacher leaders deemphasize their status as experts and avoid delivering hard feedback about teaching practice. Yet these actions ultimately undermine the work of improving instruction. How can the teacher leader be both a trusted colleague and a resource for instructional improvement? (Mangin & Stoelinga, 2011, p.48)

According to Mangin and Stoelinga, too many teacher leaders choose only to provide “nonintrusive assistance” helping teachers by supplying materials and resources but avoiding challenging conversations about practice (2011, p. 49). To counteract this tendency, the authors suggest that teacher leaders should form purposeful relationships rather than on ones built upon affableness and collegiality. Teacher leaders need to hone their skills in providing concrete and constructive feedback. Such a commitment to leading for instructional change means establishing relationships, from the outset of any improvement project, that are based upon honest and clear feedback. As Mangin and Stoelinga suggest, this would involve redefining peer relationships and expectations about school improvement and quality teaching practice. To sustain any meaningful and lasting changes teacher leaders have to work closely with their administration to make the mission, goals, and norms of their collaborative improvement project quite clear to the whole faculty.

While most of the research on instructional teacher leadership would affirm that relationship building and establishing trust is essential for change leadership, I wondered if the short articles from Mangin and Stoelinga (2011) and Barth (2001) over-stated concerns about resistant teachers and timid or non-intrusive instructional teacher leaders. While I had met several rather acrimonious colleagues in my tenure as an AISI consultant (instructional teacher leader), I had also met many more teachers who were encouraging and open to constructive criticism. This study of AISI instructional teacher leaders would certainly allow me to explore this issue more deeply. The interviews with the ten

instructional teacher leaders provided some rather clear evidence of resistant colleagues, straddled lines and deferred feedback, but it also put these instances into a more balanced perspective.

Impacts of instructional teacher leadership.

Crowther et al. (2002) not only outlined important roles of instructional teacher leaders but pointed to the positive influence that such individuals provided to their school communities by conveying convictions, building respect and trust, facilitating communities of learning, confronting barriers, translating ideas and giving clarity, and nurturing a culture of success (p. 4-5). Instructional teacher leaders, at their best, are transformative forces facilitating professional development for all of the adults within the school community; providing timely, research-based support to colleagues; improving student performance and development; and shaping the school and district into a sustainable learning community (Lambert, 2003, p. 426). When teacher leadership is evident and effective, it instills a sense of hope and encouragement and empowers classroom teachers (Pate, James & Leech, 2005). However, the benefits of teacher leadership are not just for the faculty and students; there are also intrinsic rewards to being a teacher leader; teacher leaders experience a reduction in isolation, they gain satisfaction from contributing to school improvement, they feel more invested and instrumental in the future direction of their school, they gain valuable professional development that also impacts their own practice, and they learn a great deal about themselves and their ability to lead change (Barth, p. 449).

Optimal conditions for instructional teacher leadership.

Unfortunately not every instructional teacher leader has been placed in ideal circumstances. Portner and Collins (2014) wrote that teacher leaders who promoted instructional change sometimes encountered resistance, suspicion or indifference. Such circumstances did not automatically precluded success, but they did make the task of the teacher leader challenging. In researching the issue around optimal conditions for instructional leadership I found that the literature suggested two major factors: (1) the pre-existing culture in the school regarding school improvement, professional collaboration

and change, and (2) the type of leadership practiced by the principal of the school and the district leaders.

School culture. Based upon a series of interviews with two highly respected teacher leaders (identified by colleagues, students and parents) who were involved in instructional change, Lattimer (2007) suggested four essential requirements for schools that wish to support and empower their instructional teacher leaders. First, these institutions and the people in them need to show respect for teacher knowledge. Valuing and validating instructional teacher leaders helps empower them and enables teacher leaders to persevere and make a difference. Diminishing their role by dictating and directing or complicating their role by resisting or ignoring will serve only to foster frustration and withdrawal. Second, schools need to foster a sense of community where teachers could freely discuss student achievement, curricula, professional development and other topics without the looming shadow of administrative judgment and evaluation. Third, the teaching staff needs to tie any work they did with instructional teacher leaders directly to student needs and not to meaningless tasks that may have political or personal value but little practical value. Fourth, instructional teacher leaders need to be able to grow through regular opportunities to critically reflect. Such reflection demands time, support, dialogue and critical questions. If schools can effectively fulfill these four requirements, teacher leadership will flourish and grow, if not it may diminish or disappear altogether.

In addition, the literature suggested that instructional teacher leaders may experience greater success if:

- Principals and teachers champion reform and raise expectations for the faculty;
- The staff shares in the mission and goals of the improvement project;
- Classrooms are opened and teachers share their progress;
- Colleagues are collaborative, supportive and encouraging;
- There is timely professional support for both teacher leader and for staff in general;
- Trust is established and there is accountability to promote improvement - not to assign blame or judgment;
- Short-term and long-term success is shared and celebrated; and,

- Teacher leadership is not seen as an add-on or a novelty, it becomes part of the way business is done at that school or in that district.

(Barth, 2001; Harris and Muijs, 2003; Danielson, 2006; Killion, 2007a; Portner & Collins, 2014; Lattimer, 2007)

School Leadership. Administrators can assist their instructional teacher leaders by providing a clear vision, by leading by example and by supporting the work of the teacher leaders in visible and tangible ways (Barth, 2001, p.449; Portner and Collins, 2014, p.61, 62). Portner and Collins urged principals to undergo a paradigm shift to become a “leader of leaders” (p. 31), embrace servant leadership (p. 105), find common ground (p.21), raise expectations (p. 62), and establish a school climate based upon trust, collective mindfulness (p.94) and shared accountability (p. 115). Administrative supports may include giving teacher leaders dedicated time to do research, to pilot strategies, to meet with fellow teachers, and to visit classrooms. Other supports would include the provision of resources, opportunities to attend professional development both in pedagogy and in leadership, and advocating for improvement by promoting teacher leadership work to the rest of the staff. If administrators are committed to school improvement, they should empower teacher leaders, clearing away structural barriers that may prevent cross-subject and cross-grade collaborative work and encouraging teacher leaders and teachers in general to take risks and try innovative practices (Harris and Muijs, 2003).

Ultimately, it is important that instructional teacher leaders and their administrators work together to ensure that the school is ready for and accepting of such leadership. Administrators will need to take on a more distributed or dispersed leadership model and practice sharing responsibility with their staff through empowerment, trust, validation, and raised collective expectations (increased professionalism) (Harris and Muijs, 2003; Dufour, 2004; Lambert, 2003; Portner & Collins, 2014). When teachers participated in decision-making there were direct impacts upon the school community, teaching quality, and student achievement (Katzenmeyer and Moller, 2001; Greenlee, 2007; DeVilliers & Pretorius, 2011). In explaining this new model of shared leadership, Lambert (2003) suggested that, to encourage teacher leadership that targets instructional change, administrators and teachers should operate following six assumptions:

- (1) Leadership may be understood as reciprocal, purposeful learning in community.
- (2) Everyone has the right, responsibility and capability to be a leader.
- (3) The adult learning environment in the school and district is the most critical factor in evoking leadership identities and actions.
- (4) Within that environment, opportunities for skillful participation top the list of priorities.
- (5) How we define leadership frames how people will participate.
- (6) Educators are purposeful—leading realises purpose.

(Lambert, 2003, p. 425)

Portner and Collins (2014) said that distributed leadership and instructional teacher leadership were essential parts of a distributed leadership model for schools. When evidenced within AISI projects, distributed leadership was seen to enhance capacity building, address ambiguity and uncertainty, provide modeling, promote site-based independence (less need for external support), foster commitment and motivation and promote sustainability (Foster et al., 2008, p.16). In addition, as leaders who promote trust and invest in their staff members, principals should also recognize when they might get in the way of teacher leadership, clinging too tightly to traditional leadership processes and thereby blocking teacher initiated reform (Barth, 2001, p.449; Lattimer, 2007).

For this study I was interested in learning more about the ideal contexts for instructional teacher leadership. I wondered if, as many of the researchers seem to imply, the optimal environment for change leadership was almost completely dependent upon school and district administrators or if there were other factors to consider. I knew that the ten different instructional teacher leaders in this study would come from a variety of contexts with different expectations and different leadership models and supports. Some of the instructional teacher leaders worked in only one school (their home school) while others worked in as many as six or seven schools. What would the different models and different contexts reveal about the optimal environment for school improvement as facilitated through instructional teacher leaders? Was the leadership given by principals and district leaders the key to creating optimal conditions? Were the conditions largely dependent on the pre-existing climate and history at each school? Or did the instructional

teacher leaders have the greatest influence upon the creation and maintenance of optimal conditions?

Summary

This chapter provided an overview of teacher leadership and particularly of instructional teacher leadership (or leadership for school improvement) in light of relevant research and writings. In the chapter I have stressed the need to see instructional teacher leadership as a particular role to be set apart from other school leadership roles that revolve more around administrative and professional duties. The instructional teacher leader has a very specific charge and the role comes with expectations and constraints. The chapter also shared the Alberta context for this particular case study on instructional teacher leadership and the impact that AISI has had upon cultivating and defining such leadership. Furthermore, I have used this chapter to explain the literature base for this study, outlining some of the most recent and more pertinent studies on the experience of educators who have taken on instructional leadership roles and were expected to champion for pedagogical change using their expertise, credibility and kinship as fellow teachers to convince their colleagues to implement reforms. Finally I have explored six dimensions of the instructional teacher leadership experience; motivations, qualities, roles, challenges, impacts and optimal conditions as they have been characterized by recent research and literature. These six dimensions provided clear direction for inquiry into AISI instructional teacher leadership.

In the next chapter I share how in reviewing the literature, conducting the interviews and reviewing the transcripts I moved from a simple working frame to a more developed conceptual model.

Chapter 3: An Emergent Frame for Inquiry and Analysis

This chapter will provide a description of how I came to develop a conceptual model for analyzing and describing the experiences of AISI Instructional Teacher Leaders. The Instructional Teacher Leadership Adaptive Process Model emerged gradually as I reviewed the literature, designed the study, conducted the interviews and coded the interview transcripts. I have set out the chapter in four sections: (1) reviewing conclusions from the literature review, (2) considering other frameworks for describing the experiences of instructional teacher leaders, (3) building a working frame for inquiry, and (4) coming to a more formal conceptual model and organizational frame.

Reviewing Conclusions from the Literature

Before beginning the interviews with the ten people who had volunteered for this study, I needed to fashion a framework for inquiry. I was not comfortable with the idea of unscripted, very open-ended interviews. Although I was interested in securing rich and detailed accounts of each participant's experiences and journey as an instructional teacher leader, I also had some very specific questions to ask about motivations, challenges, support, and efficacy. These questions would need to be asked within some sort of frame so that the interviewees would have a better sense of the study and so that I might have an easier time in organizing their responses.

From the literature review I learned that instructional teacher leaders are change agents (Danielson, 2006) who have the potential to transform schools (Acker-Hocevar & Touchton, 1999) and to improve student achievement (Childs-Bowen, Moller, & Scrivner, p. 2000; Leithwood & Levin, 2005; Reeves, 2008). Instructional teacher leaders look to make an impact or extend their influence but not as administrators or managers (Danielson, 2006; Portner & Collins, 2014) and yet these individuals are integral to school leadership and educational reform (Harris & Muijs, 2003; Portner & Collins, 2014). The mandate of the instructional teacher leaders is complex and challenging due to the fact that these educators are expected to fulfill multiple roles (Killian & Harrison, 2007), exhibit character traits that inspire and promote trust (Norris, 2010), and possess adaptive capacity (Bowman, 2004) so they may deal with issues that arise with organization, relationships

and program planning. Because instructional teacher leaders are faced with many responsibilities and challenges (Barth, 2001; Crowther, Kaagan, Ferguson, & Hann, 2002) they need a supportive and collaborative environment to fulfill their tasks (Crowther et al., 2002; Lambert, 2003).

In order to experience success and effectively champion educational reform, instructional leaders need to exercise influence in the whole school community (Killion, 2011), engage and empower their colleagues (Harris, 2002), and provide necessary support and expertise in a timely fashion (Harris, 2002). Instructional teacher leaders mobilize and sustain pedagogical change (Danielson, 2006) by focusing on building *capacity* in others (Killion, 2011), by translating ideas into systems of action (Crowther et al., 2002), and by using data and sound research to make decisions (Danielson, 2006). If an instructional teacher leader has credibility and trust, he or she may be able to build relationships and networks (Harris, 2002) and facilitate communities of learning (Crowther et al., 2002).

The experience of an instructional teacher leader is complicated and constantly changing because they must adjust to their new roles (Akert & Martin, 2012; Angelle & DeHart, 2011) and they need to continually negotiate their roles in light of the local context and the people they are working with (Angelle & Schmid, 2007). Instructional teacher leaders can only use credibility and influence to make changes and have little administrative power (Danielson, 2006) and this necessitates *straddling the line* as both teachers and leaders and maintaining relationships and professional confidences in the face of increasing expectations (Mangin & Stoelinga 2011). Instructional teacher leaders must take risks and put themselves into vulnerable positions (Pate, James, & Leech, 2005) while they are frequently challenged by a multitude of tasks, a limited amount of time, some resistant or reluctant colleagues, and undue or unrealistic expectations from administration (Barth, 2001). Perhaps the most difficult role of the instructional teacher leader is that of being a critical colleague; they must confront poor or ineffective practice (Mangin & Stoelinga, 2011) often in the face of resistance or defensiveness.

My review of the literature, made it possible to start with a clearer picture about the experience of the instructional teacher leader than I might have had based solely upon my own experiences with AISI and change leadership. I came to understand that the position required an individual with strong convictions and a very refined skill set that allowed for the negotiation of roles and tasks but not overall goals. I also wondered if, as they grew into the overall role of change agent and champion, instructional teacher leaders went through the same kind of adaptive processes that allowed them to find success and sustainability on personal and professional levels. My study would hopefully shed some light on this.

Frameworks Describing the Experience of Instructional Teacher Leaders

As I moved from reviewing the literature to constructing an inquiry plan, I considered several recent studies and the way in which the individual researchers conducted their inquiry. These studies included: a narrative inquiry which endeavoured to learn how a teacher leader constructs an identity by (Cortez-Ford 2008); a phenomenological study of how a teacher experiences fulfilling the role of teacher leader (Norris, 2010); and a mixed-methods inquiry that investigated the norms, habits, and structures that allow teacher leaders to perform specific roles and functions (Salazar, 2010). All these studies provided a clearer picture of instructional teacher leader and provided some direction for my particular study into the world of the instructional teacher leader.

Especially useful were several models on teacher leadership that have been advanced, including Harris and Muijs's "Leadership Dimensions" (2003), Norris's "Conceptualization of the Experience of Cognitive Change" (2010, p. 166), and Salazar's "Teacher Leadership Theoretical Framework" (Salazar, 2010). All these models speak to the interactive and reflective nature of teacher leadership. As I prepared my interview guidelines I considered each of these three models as possible organizational frames for informing my interviews and subsequent analysis.

Harris and Muijs's (2003) four different dimensions of teacher leadership, (guiding and interpreting, engaging and empowering, mediating and supporting, and collaborating and connecting) were useful for describing the work that instructional teacher leaders do. I appreciated the terminology and the focus on responsive action when I constructed

questions for the individual instructional teacher leaders to relate examples of how they gave support to their colleagues. However, working with the faculty was just one of the aspects that I wanted to investigate with this study of AISI Instructional Teacher Leaders. I was also interested in how and why teachers moved into how and why teacher leadership roles, how the transition impacted their identity, how they negotiated their roles, how they dealt with challenges and how they reflected upon their progress and personal efficacy. I needed an organizational frame that captured more of the whole experience of instructional teacher leaders.

Norris's model, which she used to describe how teacher leaders in instructional leadership roles form a leadership identity, focused upon four significant actions of the instructional teacher leader: learning, communicating, doing, and reflecting (Norris, 2010, p. 166). Norris asserted that instructional teacher leaders were empowered by supports (instructional leadership from the administration, access to professional development and resources, and support from the faculty) and hindered by frustrations and tensions (teacher resistance, changing relationships, and the lack of shared leadership). Norris's model came much closer to describing the phenomena I hoped to research in my case study—it acknowledged the larger contexts and focused on some of the internal work that instructional teacher leaders needed to do to adapt and adjust (learning, communicating, doing, and reflecting). At the same time I felt Norris's model missed elements related to the development of instructional teacher leaders. I conjectured that instructional teacher leaders went through a process of initiation and that they gained expertise and confidence as they worked through the challenges they faced. I wanted an organizational model that would allow me to ask these educators not only about their work and challenges, but also about their entry into the leadership role and their reflections on how the role has impacted them.

Of the three models I considered, the most complex model was Salazar's "Teacher Leadership Framework" (Salazar, 2010, p. 50). For his theoretical framework, Salazar fashioned a concentric model that focused on institutional and instructional change. In the model, the focus is put squarely upon student achievement and teacher practice and Salazar presented teacher leaders as one possible factor that ultimately might bring about

meaningful pedagogical change. The other three factors that promote instructional change and hopefully improve student learning were: the norms of practice in the school itself (conversation, collaboration, and participation); the culture of the school regarding improvement (autonomy, collegiality, positivity); and the way in which the faculty worked together (professional learning communities, teamwork). What I appreciated in Salazar's model was that it showed instructional teacher leaders do not work in isolation; their success as change agents is dependent upon other factors including the dimensions of school culture, norms of practice, and communities of practice. That said, I felt that the four dimensions Salazar outlined seemed to have a great deal of overlap (all speak to collaboration and openness to change). And while Salazar's model helped clarify the ideal conditions for instructional teacher leadership, it did not speak directly to the lived experience of instructional teacher leaders, how they dealt with issues related to a change in their roles and identity, or how they might persevere when they encountered challenges related to project management and relationships. For the purposes of this study, I needed an organizational frame that focused only on the experience of the instructional teacher leader - on their motivations, challenges, successes, significant experiences and insights. I also needed something that could convey intention and progress; as change agents these educators were charged with implementing reforms - so their choices and actions were purposeful.

Building a Working Organizational Frame for this Study

I decided to construct a tentative model that might describe four distinct processes that instructional teacher leaders go through as they experienced their roles. I needed a model that could help me investigate the fact that instructional teacher leaders transitioned from their former role of teacher to a new role with a very different mandate. Just how difficult was this transition? What was gained and what is lost in this process? The model also needed to reflect the kinds of work that these instructional teacher leaders did and the ways in which they adapted their approaches for various contexts and specific colleagues. Did the instructional leaders work in all the dimensions that Harris and Muijs (2003) outline? Did they primarily do their work in one way or did they take on many of the roles that Killion and Harrison (2007) described? How did the instructional teacher leaders cope

with organizational and relational issues? Did they experience the kinds of frustration that Barth (2001) or Mangin and Stoelinga (2011) described? And, how did these instructional teacher leaders see themselves with respect to the bigger picture around school improvement? Did they feel like their efforts made a difference?

With these themes and questions in mind I developed a simple organizational frame that would allow me to organize my themes, craft interview guides, explore related themes, and establish bins or files to sort the data into. The four processes I chose to examine were:

1. **Becoming an Instructional Teacher Leader** (initiation)

In asking about this process I was interested in hearing about the instructional teacher's entry into the role, their motivations and their initial interactions with colleagues. (Kuntz, 2014; Danielson, 2006; Portner & Collins, 2014; Norris, 2010; Akert & Martin, 2012; and Angelle & DeHart, 2011)

2. **Working as an Instructional Teacher Leader** (roles)

When I interviewed the instructional teacher leaders about this process, I was interested in the roles they fulfilled, the responsibilities they felt, the tasks they completed, and the support models they adopted to work with their colleagues. (Killian and Harrison, 2007; Crowther et al., 2002, Harris, 2002; Angelle & Schmid, 2007)

3. **Living as an Instructional Teacher Leader** (relationships)

In asking about this process I was interested in comparing the instructional teacher leader's initial motivations and ideals with their experience of the 'real world' of instructional teacher leadership. I wanted to know if they encountered significant challenges that impacted them on professional and personal levels and just how they dealt with these challenges. (Barth, 2001; Mangin & Stoelinga 2011; Pate, James, and Leech, 2005)

4. **Reflecting on Instructional Teacher Leadership** (significance).

The final interview with each of the instructional teacher leaders asked the participants for a reflective evaluation of their experience. I wanted to know how the instructional teacher leaders considered and re-considered their actions and

impact over the course of their tenure in this role. (Crowther, Kaagan, Ferguson, & Hann, 2002; Lambert, 2003)

The four processes of the working model provided a theoretical framework, an underlying structure—the scaffolding or frame—for my study which allowed me to define or clarify certain concepts and theories and identify my assumptions, expectations, and beliefs about instructional teacher leadership (Merriam, 2009, p. 66). Within this frame I was able to organize and incorporate my understanding and questions about the six dimensions I would be exploring (motivations, qualities, roles, challenges, impacts and optimal conditions). The frame also allowed me to explore the instructional teacher leadership experience in a more comprehensive and connected way; by asking the interviewees about their experiences in becoming, working, living and reflecting, I would be able to secure a better understanding about the context in which the ten participants acted on their motivations, developed certain qualities, fulfilled roles, met challenges, made an impact, and influenced the culture of their schools and districts.

The Emergence of a Conceptual Model

While the working model or theoretical frame allowed me to construct four different interview guides and provided a way for me to sort the data into bins or nodes, I was cognizant of the fact that I was on an exploration. The working model might help me chart a course (a road map if you will) but it could not completely predict my investigative paths and observations as I worked through the data. I was cognizant of the fact that qualitative research is often an inductive process where “researchers gather data to build concepts, hypotheses, or theories rather than deductively testing hypotheses as in positivist research” (Merriam, 2009, p. 15). The framework needed to be flexible, allowing for the emergence of new concepts and themes and yet it needed to provide boundaries for the study (Stake, 1995, p. 2) so that the phenomena or case (the experience of the instructional teacher leader) might be clearly specified and established.

As I worked through the transcripts coding the responses according to pre-determined themes (motivations, characteristics, roles, tasks, etc.) and emergent themes, and as I sorted the excerpts into the four bins (becoming, working, living and reflecting) a conceptual model gradually emerged. (For a more detailed explanation of the process used

for analysing the case study interviews see chapter four: Methodology) The four original file names for the case study data bins no longer accurately described all of the information that was stored there. For example, when I asked about their motivations and the need to clarify their mandate and task, both for their colleagues and for themselves, the instructional teacher leaders let me know that they had to do this *all through their improvement projects*. Clarifying was not a phenomenon that happened in the first few months and then never happened again; it happened each time the instructional teacher leader took on a new challenge, a new teacher or a new role. I also had to re-shuffle much of the data from bin to bin as each of the four themes or processes gained clarity and emerged from the data. For example, I soon realized that some of the questions and themes I had originally assigned to the process of living as an instructional leader really had more to do with how the instructional teacher leaders defined, refined and clarified the role for their colleagues.

As I followed processes suggested by Stake (1995, p. 71-90), looking to make correspondences, interpretations, and naturalistic generalizations and by Yin (1999, p. 136-160) using techniques of pattern matching, explanation building, and cross-case analysis, I was found that the four processes did not effectively describe the complex experiences and the requisite adaptive processes that instructional teacher leaders went through. By focusing on becoming (initiation), working (roles and responsibilities), living (dealing with challenges), and reflecting (impacts and optimal conditions) I found I was only seeking to confirm the findings of earlier studies. I also discovered that I was limiting myself to a framework that was too discrete, too sequential and too straightforward. In my data analysis I also learned that the four processes suggested by my tentative organizational frame really did not capture the fluidity and adaptability that was required by instructional teacher leaders.

As difficult as it was to code and sort the responses of the instructional teacher leaders, I felt that a new conceptual model—as I could see it emerging—presented a much more accurate description of the experience of the AISI Instructional Teacher Leader. The experiences of instructional teacher leaders illustrated very complex adaptive processes that happened concurrently and sometimes played off of one another.

To give an example of this complexity and adaptability, let me use an example that might serve as illustration. In one of her interviews Charlotte related the complicated relationship she had with one partner teacher:

In the school that I had worked in before, I was working with a teacher who was voluntold, but we had a great relationship. I spent a lot of time with his behaviour management kids the year before. So we had worked together well, but he was a lot older than me, he had a lot of faith in me, more so on that behaviour management page. So when I walked in there he was, he asked, "Were you told to be in here, because I didn't put my hand up for this or anything? So if you are here to help me with my behaviour management kids, that is awesome but, what is this? What are you doing?" He had no understanding at all of why I was in there. And even when I had told him, it was so new that it took a while for him to give it over. I mean we had a trust but he was also very fixated that everything is on technology everything is based on technology. And we are like talking cheese because, I love technology but I don't think that there is a place for every child with technology. I think that there has to be balance in the classroom and so that was not his thing. And he believed that he could get technology into everything in the classroom, everything. No pen and paper at all. And I get that, but there were students in the class who were going undetected in certain ways. So it was a little bit complicated, you know, there were some challenges there. But we were lucky that we had somewhat of a good relationship; that we could talk through things, and he would try, but he just wasn't ready. He just wasn't ready. (Charlotte)

In this retelling, Charlotte revealed that she had worked through four processes: (1) she discovered the need to clarify her role to the teacher even though they already had a working relationship, (2) she considered ways to begin the process of engaging her colleague in school improvement work, perhaps through professional conversation about technology or in dealing with classroom management issues (not part of the project plan), (3) she encountered and needed to respond to relational and organizational issues finding out that the teacher was "voluntold", was not really expecting a visit, and had a much more technological orientation, and (4) she reflected on the purpose of her visit, the teacher's readiness and she considered how she needed to proceed.

When I was reviewing, coding and sorting the data, I noticed experiences like Charlotte's in working through various adaptive processes aligned and compared with the experiences described by many of the other instructional teacher leaders interviewed. Correlations and patterns were developing. I reviewed my notes, re-considered the coding and began to rearrange the data in the bins with respect to four processes I could see

emerging: (1) defining and refining, (2) advocating and working, (3) responding and persevering, (4) reflecting and rededicating. The biggest changes happened to the first bin, which was originally labelled: becoming. From the transcripts I began to realize that the instructional teacher leaders constantly had to explain their purpose and identity, both to themselves and to the stakeholders they worked with and for. Thinking of the adaptive process in terms of an initiation or first step, was limiting. In addition, the data was showing that reflecting was something that cut across the three other processes and yet was different; it involved more introspection and informed judgement. However, I soon realized that terms like refining, persevering and rededicating were too value-laden and led to sympathetic rather than independent and unbiased interpretations. Some instructional teacher leaders might choose **not** to persevere or rededicate.

The description and conceptual naming of the processes continued to evolve and transform as I continued to make observations, groupings, matrices and graphic organizers to elucidate and capture the inductive judgements and conclusions I was making. I eventually came to call the emergent conceptual model: the Instructional Teacher Leadership Adaptive Process Model. Using the emerging model as a lens through which I could study and analyze each separate case as well as the overall phenomena of instructional teacher leadership I could eventually suggest that the ten AISI instructional coaches and lead teachers worked through four interconnected, iterative and concurrent processes as they developed their instructional teacher leadership identities. These four processes eventually came to be called:

- **Clarifying** – Taking on the Role and Shaping an Identity;
- **Engaging** – Involving the Faculty and Building Relationships;
- **Responding** – Dealing with Challenges and Balancing Priorities; and
- **Reflecting** – Making Adjustments based on Observation, Analysis, and Implications.

For each of the four adaptive processes I could suggest sub-processes. Within each data bin, there were certain elements and themes that occurred and recurred in the coded transcript excerpts and these themes allowed me to group statements and ideas as identifiable sub-processes of for each adaptive process. For instance, in engaging the faculty in school improvement work I found the instructional teacher leader had to: (1) make sure the

administration understood and supported their efforts, (2) make a connection with both the teacher and the students they might work with, (3) identify and assess the needs for the teacher and the students, (4) negotiate their role with the cooperating teacher, and (5) provide timely, constructive and pedagogically sound support.

What follows is an overview of the four adaptive processes and their sub-processes as they are discussed in this document:

- **Clarifying - Taking on the Role and Shaping an Identity**
 - Clarifying Motivations
 - Clarifying Mission and Roles
 - Clarifying Purpose and Gaining Confidence
 - Clarifying Responsibilities
- **Engaging - Working with the Faculty and Building Relationships**
 - Engaging the Principal and Administrative Team
 - Engaging Interested Teachers
 - Getting Started on School Improvement
 - Considering Roles and Responsibilities
 - Negotiating Roles; Being Responsive
 - Collaborating and Engaging in Reform
- **Responding - Dealing with Challenges and Balancing Priorities**
 - Responding to Perceptions, Expectations, and Personal Realizations
 - Responding to Organizational Challenges
 - Responding to Relational Challenges
 - Persisting and Persevering
 - Weighing Personal, Professional, and Family Needs
- **Reflecting - Adjusting based on Observation, Analysis, and Implications.**
 - Reflecting While Leading for Change
 - Reflecting as a Team

The transcripts revealed that the instructional teacher leaders had to work through the four processes on a daily, sometimes minute by minute basis, in order to try and establish trust, gain credibility, build relationships and engage in collaborative work

related to pedagogy and practice. According to their reports, the instructional teacher leaders said that they were attempting to engender hope, understanding, professional judgement, ownership and agency amongst their colleagues and I would suggest that they did this work through various adaptive processes: by clarifying, engaging, responding and reflecting. When the instructional teacher leaders encountered issues related to their efforts in school improvement, I would suggest that it was because they had difficulty in negotiating and navigating their way through one or more of these adaptive processes.

In addition, the instructional teacher leaders shared anecdotes and insights that showed that the four iterative and adaptive processes are impacted by two environmental factors:

- **school culture**, which included norms, leadership structure, faculty support, collaborative practice (Barth, 2001, p.449; Portner and Collins, 2014, p.61, 62; Salazar, 2010, p. 49; and Lattimer 2007).
- **assigned roles and staff perceptions**, which challenged individual teacher leaders to be responsive and adaptable (Barth, 2001; Killion & Harrison, 2007; Akert & Martin, 2012).

I also discovered/affirmed that how the instructional teacher went through the adaptive processes and dealt with the challenges related to school culture, assigned roles, and staff perceptions was related to two important background factors:

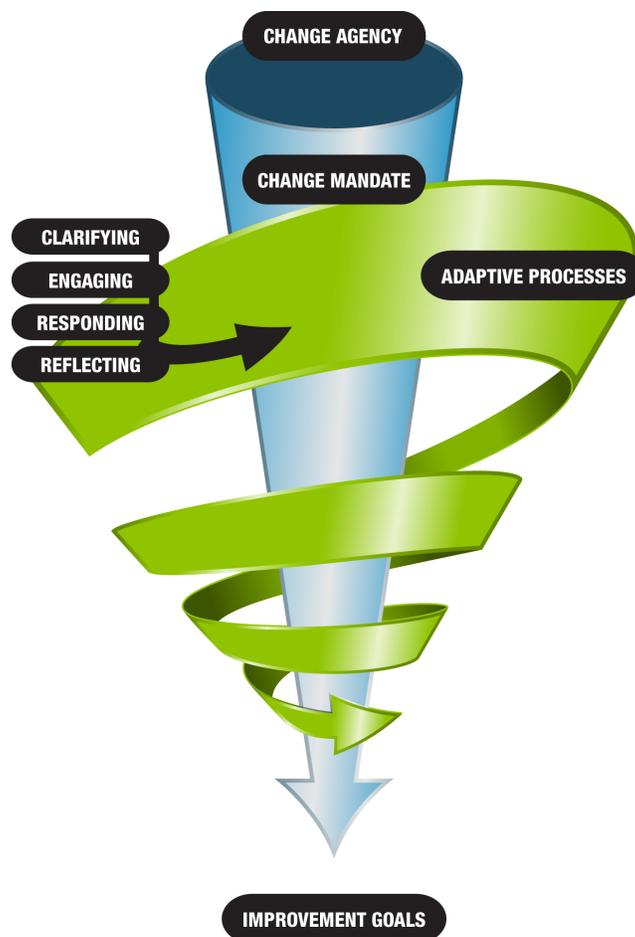
- **previous and ongoing training** – the instructional teacher leaders developed expertise in leadership, coaching or the areas of reform (Portner and Collins, 2014); and
- **personal and professional qualities** – the approachability of the instructional teacher leader as being knowledgeable, enthusiastic, committed, willing to take risks, etc. (Norris, 2010).

Depending on whether these factors are manifested positively or negatively, each of the four factors can serve to enhance or interfere with credibility, relationship building, meaningful collaboration and pedagogical change. According to the ten instructional teachers interviewed, skilled and tactful instructional teacher leaders who found themselves in supportive environments had an easier time in fostering professional

ownership and meaningful change. Inadequately prepared instructional teacher leaders, instructional teacher leaders with poor relational skills, or instructional teacher leaders who found themselves in resistant and skeptical environments ultimately found their power diminished or drained by these factors.

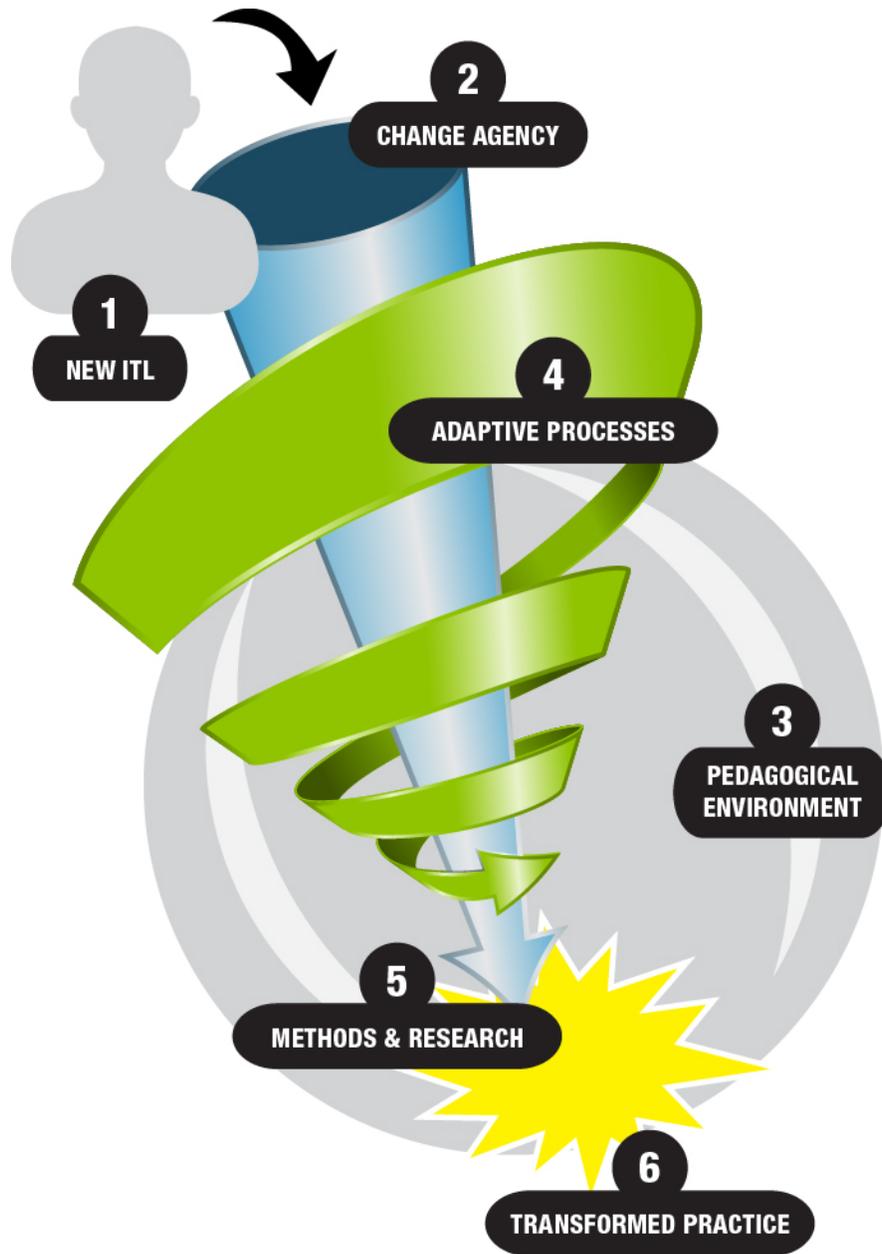
To reiterate, the four adaptive processes did not happen sequentially. From the moment a teacher was appointed or chose to take on an instructional leadership role he or she began to engage in all four actions. The relative success the instructional teacher leader felt as a “change agent” was impacted by how well the teacher leader worked through these processes that impact their leadership and success. A visual representation of the *Instructional Teacher Leadership Adaptive Process Model* is provided below:

Figure 1: The Instructional Teacher Leadership Adaptive Process Model



The *Instructional Teacher Leadership Adaptive Process Model* as it is situated in the larger scope of the school environment might be represented as follows:

Figure 2: The Instructional Teacher Leadership Adaptive Process Model (expanded)



The Instructional Teacher Leadership Adaptive Process Model is founded upon a number of observations I was able to make from the interview transcripts. I learned that:

1. Each instructional teacher leader, at one point or another, was given a mandate to lead for instructional reform. In addition, each teacher leader came to the position with individual intentions and aspirations, personal qualities, and prior training and experience.
2. Once a teacher took responsibility for fulfilling the mandate, he or she assumed the mantle of instructional leadership or instructional change agency. In taking on this role, the teacher was expected to influence the pedagogical environment of the school, get to the essentials of pedagogy and practice, and initiate a transformation.
3. The environment of the school may have been easy or difficult to transform based upon the pre-existing culture around professional learning and change; the expectations of the staff regarding the instructional teacher leader and his or her role; and the level of understanding and support shown by the administrative team and various informal teacher leaders in the faculty.
4. To effect change, an instructional teacher leader needed to apply gradual and persistent pressure, often returning to the same issues and advocating for the same reforms in slightly different ways. In order to apply this persistent pressure, the instructional teacher leader needed to constantly work through the four personal and professional processes: clarifying, engaging, responding, and reflecting. How an instructional teacher leader worked through these four processes greatly influenced how quickly the reform or instructional change happened.
5. To advance the reform the instructional teacher leader needed to espouse research and proven practices and to judiciously select the best way to feature those pedagogical advances (coaching, consulting, modeling, resource development...).
6. Ultimately, if the work of the instructional teacher leader was accepted and incorporated into the culture and routines of the school environment, a transformation could be evidenced that showed change in the way the faculty approached teaching and learning. If the instructional teacher leader was not successful in his or her school improvement work, the reform failed to take hold.

The formulation of the adaptive process model also made it possible to conceptualize and explain the lived experience of an instructional teacher leader and the processes these leaders go through as they take on and fulfill that role. Specifically, the model allowed for the consolidation of previous theories and concepts in a format that captures the complex, adaptive processes involved in leading reform as an instructional teacher leader and a clearer identification of the phenomena in question (experiencing instructional teacher leadership). Most importantly, the conceptual model provided a structure or theoretical frame from which to organize the data, test assumptions, analyze data, and present new findings. It also established a common language and frame of reference for the study so that it may be compared and contrasted with other studies and eventually add to the research base in the field of educational leadership.

Summary

This chapter showed the development of the The Instructional Teacher Leadership Adaptive Process Model from a tentative working frame with four processes (becoming, working, living and reflecting) to a more complex conceptual model that represented instructional teacher leadership processes as concurrent, iterative and purposeful. More importantly, the chapter presented the conceptual model as a structure or theoretical frame that was eventually used to analyze data, test assumptions, identify emergent themes, organize the data, and present findings. The conceptual model also established a common language and frame of reference for the study. In the next chapter I will describe the methodology used to gather data and concurrently develop and test this conceptual frame and gain a better understanding of the lived experience of instructional teacher leaders.

Chapter 4: Methodology

Exploring the Experience of AISI Instructional Teacher Leaders was completed using qualitative research methods. The methodology for this inquiry reflects a tradition of naturalistic inquiry (Guba, 1981). An inquiry in this tradition emphasizes the views of the participants, their unique contexts and circumstances, and the way in which they make sense of the issues that are being examined (Creswell, 2005, p. 48). The central aim of this research was to construct a better understanding of the experience of instructional teacher leaders by investigating how individual instructional teacher leaders reportedly fulfilled their mandate and by presenting their authentic accounts. Research was managed by identifying ten individuals to serve as case study participants, and conducting a series of focused interviews with each of these ten teacher leader volunteers. These in-depth case study interviews provided extensive study data. The interviews encouraged inquiry into processes, relationships, and broad research questions; allowed for the acknowledgement of and adaptation to situational complexity; and provided rich and descriptive accounts that invited reader reflection (Cousin, 2009, p. 131-132).

This chapter provides an overview of the research approach and design. The first part of chapter specifically deals with case study as a methodology. I assert that case studies, when conducted in a thorough and transparent manner, can certainly provide trustworthy and meaningful data upon which we may be able to base significant assertions. In the second part of the chapter I will describe how I conducted the research and analyzing the data.

Philosophical Assumptions

The research and data from this study into the lived experience of instructional teacher leaders, was approached from an “interpretive paradigm” (as opposed to a positivist paradigm or critical paradigm) or as “constructivism” (meaning and reality is constructed on an individual basis) (Bailey, 2007, p.53-54). Studies done in this research tradition reject the positivistic notions of scientism and clinical study, and instead place more emphasis on situational contexts, social relationships, critical events, and individualistic responses. It was anticipated that each of these four factors would play an

important role in the development of a teacher leader. Working from an interpretative paradigm, I endeavored to find out:

... what kinds of things people do, how they do them, what purposes activities serve and what they mean to participants. In other words, the researcher becomes interested in the meanings, symbols, beliefs, ideas, and feelings given or attached to objects, events, activities and others by participants in the setting. (Bailey, 2007, p.54)

Specifically, I was interested in learning how instructional teacher leaders build and solidify a leadership identity. How did circumstances, events, personal beliefs, and organizational pressures impact their development? How did they cope with setbacks, resistance, and disappointments? What sustained them as they engaged in their roles as lead learner, coach, and change agent? And, what advice and insights would they pass to those considering a move into teacher leadership?

Research Design and Rationale for a Case Study

For this inquiry, case study research was selected to investigate the experience of an instructional teacher leader. This case study examination of instructional teacher leaders gathered data through interviews to provide insights into the adaptive processes that each instructional teacher leader experienced as they moved into and maintained such a leadership role.

What is a case study?

Case study is an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular project, policy, institution, program or system in a real life context. It is research-based, inclusive of different methods and is evidence-led. The primary purpose is to generate in-depth understanding of a specific topic (as in a thesis), program, policy, institution or system to generate knowledge and/or inform policy development, professional practice and civil or community action (Simons, 2009, p.21).

Until recently, many researchers saw the case study as simply a focus or container for their specialized research. There were, and still are, various quantitative and qualitative case studies that rigidly adhere to particular research traditions. For instance, doing

ethnographic research by studying one particular case allows a researcher to delimit and set strict boundaries on what and how inquiry is completed.

However, case study has also emerged as its own independent research tradition or orientation. Stake (1995) develops “a view of case studies that draws from naturalistic, holistic, ethnographic, phenomenological, and biographic research methods” (p. xi). Yin (2009), also argues that case study is a separate research method and “describes a basic set of research designs for doing single—and multiple— case studies” (p. 26). Merriam (2009) and Thomas (2011) also elaborated on the aspects of effective case study research and helped to define it as a methodology and as a research tradition.

Case study research is “an in-depth description and analysis of a bounded system” (Merriam, 2009, p.40). Thomas (2011) describes the bounded case as a container, a situation or event, or even an argument (p.12-13). A researcher will choose a particular person, institution, event, or policy and will focus his or her inquiry on richly describing that one case. Case study research is concerned with particularization rather than generalization. “We take a particular case and come to know it well, not primarily as to how it is different from others but what it is, what it does” (Stake, 1995, p.8). Case study research is not limited in its approach and “does not lay claim any particular methods for data collection or data analysis”, furthermore “Any and all methods of gathering data, from testing to interviewing, can be used in a case study” (Merriam, 2009, p.42). Case study has an emphasis on interpretation: “We emphasize placing researcher in the field to observe the workings of the case, one who records objectively what is happening but simultaneously examines its meaning and redirects observation to refine or substantiate those meanings” (Stake, 1995, p. 8). The researcher is attempting to understand and may make assertions (as opposed to generalizations) based upon “vigorous interpretation” and credible conclusions based upon evidence, logic and experience (Stake, 1995, p. 8). Furthermore, case study research may be intrinsic (interested in learning about this particular case) or instrumental (interested in gaining an understanding that is not limited to this one case) (Stake, 1995, p. 2, 3).

Why choose case study?

Case study as a research methodology fits well with the research aims of this inquiry into instructional teacher leadership. As Cousin (2009) points out, case study research allows for: inquiry into processes, relationships and broad research questions; acknowledgement of situational complexity; rich and descriptive accounts that invite reader reflection; and, data gathering from a variety of sources using a variety of methods (p. 131-132).

Instructional teacher leadership is complex, impacted by relationships of trust and power and influenced by training, support, experience and situational contexts. Choosing to focus on ten instructional teacher leaders to examine their particular experiences provided ten different accounts to be studied and learned from. Case studies that are multi-case studies allow for more triangulation of data and the opportunity to make assertions based upon cross case analysis (Stake, 2006).

There were a number of benefits to using a qualitative, multi-case, case study approach for my research. Case study interviews promoted a rich and layered understanding because it provided vivid, concrete descriptions and contextual detail. Case study interviews allowed me (and subsequently the reader) to get “close to reality”, drawing on contact with each subject in the study and the researcher’s own experience and intelligence (Thomas, 2011, p.6). Additionally, case study research and analysis promoted “thick description” based upon “little questions that often lead to big answers” (Thomas, 2011, p. 6). Such thick description permitted a holistic, lifelike, grounded, and exploratory study (Merriam, 2009. p. 44) and provided me with flexibility in reporting. I could capitalize upon the uniqueness of each case and my own sensibilities and understanding of instructional teacher leadership in the AISI context.

Like Stake and Merriam, I chose to eschew a more quantitative approach to case study that emphasized “a battery of measurements” and a “collection of descriptive variables, common in medicine and special education” (Stake, 1995, p. xii). Merriam (2009) asserted that focusing on qualitative research in data-gathering and analysis techniques “stems from the fact that this design is chosen precisely because researchers are interested in insight, discovery, and interpretation rather than hypothesis testing” (p.42). My intent

was not to test an hypothesis but to provide a rich description of particular experience. Understanding the experience of the teacher leader would be best facilitated through conversations, anecdotes, artifacts, and interviews as opposed to statistical analysis or abstract generalizations based upon Likert scale survey responses.

The central subject or “case” for this study is that of the instructional teacher leader. As I noted in chapter two, this person typically has strong roots to the classroom and is aware of the nature of teaching and learning. For this particular study, instructional teacher leaders were not school or district administrators, but were fulfilling more supportive roles with little administrative authority. In most instances, they were expected to provide confidential coaching, respecting the privacy of teachers they worked with. In addition, and most importantly, these instructional teacher leaders were expected to champion educational improvement—providing a vital link between research and classroom practice.

I chose to interview ten subjects so I might better describe the multifaceted and complex case of the instructional teacher leader. Stake (2006) called this methodology “multi-case research” and asserted that individual cases will become more comprehensible when they are compared and contrasted to similar cases (p.4). Together, all ten cases represent a particular object, phenomenon, condition, or “quintain”. The phenomenon studied in my investigation was “the lived experience of the instructional teacher leader” in a school improvement role. The wealth of data generated by the case study interviews and examined in light of the emergent adaptive process model helped construct a granular yet comprehensive understanding of how instructional teacher leaders approach their task, build working relationships, negotiate their roles, and form identities. The research revealed how instructional teacher leaders see themselves and their work; what motivates them to do their work; how they persevered in advocating for instructional reform; how they responded to challenges; and how they evaluated their relative success as instructional leaders.

Validity in methodological intent.

“A case study research is about seeing something in its completeness, looking at it from many angles” (Thomas, 2011, p.23). Each carefully examined case is unique. For this reason, Thomas asserted, “We cannot generalize from a case study” (p. 23). As Bassey

(1999) suggested, theory-seeking case studies can only lead to “fuzzy generalizations” wherein the researcher, might claim the *possibility, likelihood* or *unlikelihood* based upon the examination of a single case study knowing that similar situations *might* be found elsewhere (p.12).

This lack of "generalizability" has raised questions about the importance and transferability of such a study. Researchers with experimental orientations question claims of reliability and validity for qualitative case studies. Thomas (2011) argued, “Reliability and validity are not your principal concern when doing a case study” (p.62, 63). He suggested that these terms have been imported into research methodology from psychometrics to make social research take on pseudo-scientific credibility. Thomas was concerned about a cult of “criteriology” wherein every research study is to be evaluated and discussed within a narrow framework of reliability and validity, where validity “is thus wrenched out of its home in normative research with samples, variables and statistics and bent and twisted into something quite different for the purposes of interpretive research” (p.63). Thomas asserted that the quality of case study research is actually related to five aspects: (1) clarity and consistency in writing, (2) clearly outlined questions and rationale, (3) effectively chosen methods for data collection, (4) well described research processes and (5) well formulated assertions showing a clear relationship between the evidence and the claims (p.66, 67).

Stake (1995) asserted that “in designing our studies, we qualitative researchers do not confine interpretation to the identification of variables and the development of instruments before data gathering and to analysis and interpretation for the report” (p. 8). Instead, Stake discussed the need for researchers to engage in “progressive focusing” through “vigorous interpretation” constantly refining their assertions based on new observations and insights from the data (p.9).

It was not my intention to develop an elaborate theory about instructional teacher leadership before embarking on the research. I knew that, at best, I could suggest teacher leaders all negotiate their roles and identities as they develop relationships, access training, and facilitate pedagogical change. I also realized that I held preconceived ideas about instructional teacher leadership and the aptitudes and skills that allow leaders to engage

their roles and responsibilities, but I had intended to “bracket these” to remain open to new perspectives and ideas. However, before long I found myself developing and testing a working model that might serve to organize the work and aid in data collection and analysis (See chapter three.). The model helped identify questions, dimensions, and themes that could be explored at greater length during the one-on-one interviews.

Trustworthiness.

Terms like validity and reliability are perhaps not well suited for qualitative research (Merriam, 2009); qualitative researchers employ different kinds of rhetoric to assure trustworthiness (p. 210). Merriam, citing Lincoln and Guba (1985), presented validity and reliability in a different way; discussing trustworthiness in terms of credibility, transferability, dependability, and confirmability—rather than through internal validity, external validity, reliability and objectivity (p. 211). Qualitative research, especially as it is written from more postmodern, poststructural, constructivist, and critical perspectives, is based upon different assumptions about reality and truth and the extent to which something can be “proven.” Merriam cited Maxwell (2005): “Validity is a goal rather than a product: it is never something that can be proven or taken for granted. Validity is also relative: It has to be assessed in relationship to the purposes and circumstances of the research, rather than being a context-independent property of methods or conclusions” (p.105). In discussing the challenges in dealing with validity and reliability as they pertain to qualitative research, Merriam suggested eight strategies to establish trustworthiness (p.210-229).

1. Triangulation – using multiple sources, multiple methods, and multiple researchers to confirm findings.
2. Member checks – confirming plausibility of interpretations of transcripts and data by going back to the participants for feedback.
3. Adequate engagement in data collection – spending enough time with the data for “saturation” to occur, even dealing with or seeking for discrepant cases or events

4. Researcher's position on reflexivity – employing critical self-reflection by the researcher about his or her assumptions, biases, worldview, theoretical orientation or relationship to the study.
5. Peer review/examination – engaging in discussions with colleagues about the process, emerging findings and tentative interpretations and assertions.
6. Audit trail – keeping a detailed account of methods procedures and decision points in the study. Maintaining an organized case study “database”.
7. Rich, thick descriptions – providing concrete and complete description so that readers may draw similar conclusions based on the context and see how these might be transferred to other contexts.
8. Maximum variation – providing a variety and diversity of samples to allow for a wider range of applications.

Merriam's eight strategies were based largely upon the work of Lincoln and Guba (1985, 2000), Denzin (1978), Richards (2005), Maxwell (2005) and Wolcott (2005). Merriam's list proved especially useful in establishing and refining my methodology for this study.

Merriam's emphasis on triangulation, member checks, saturation, self-reflection, peer review, audit trails and databases, thick descriptions, and a variety and diversity of samples were all significant considerations in the design of this study.

Throughout the research process I endeavored to establish trustworthiness by consciously adhering to a number of practices. In selecting the participants, I chose a range of cases for this collective case study including: variety of roles (lead teacher, instructional coach, or consultant), breadth of experience (new to the role to very experienced), and difference in context (rural, urban, small school, large etc.). I was aware that case study research is not sampling research (Stake, 1995, p.4), but in considering a range of cases I knew that a researcher could provide a richer understanding of the phenomena. In interviewing, I allowed for participants to elaborate and revisit responses, I asked for clarification and elaboration when necessary, and I checked with each teacher at the end of each interview to see if there were aspects that needed to be removed.

In analyzing, I tried to maintain consistency in terms and definitions (which often meant revisiting the data to see if the terms aligned with what they were intended to describe). I painstakingly transcribed the complete interviews and reviewed and summarized individual accounts before moving into cross-case analyses. I also established a case study database (Yin, 2005) that systematically organized the accounts for ease in cross case analysis and might allow subsequent researchers to successfully audit the investigative process and test the veracity of the work. In describing and reporting I made personal biases and shared background experiences clear in order to “bracket” these (van Manen, 1997) and suspend judgment, drawing conclusions only when the data merited it. I endeavoured to provide rich descriptions and contextualized accounts, allowing the stories and experiences of the participants to breathe life into what could otherwise be a rather dry analysis. And, throughout the research process I sought feedback on the process, challenges, emerging findings, and tentative assertions from my advisors and colleagues throughout the inquiry, data collection and data analysis process.

In summary, by considering and acting upon the recommendations of Thomas (2011), Stake (1995, 2006), Yin (2005) and Merriam (2009), I worked to address most concerns related to validity that this case-study research might encounter. The study has produced data and findings that should be seen as trustworthy, reliable, credible, transferrable and confirmable.

Ethical Considerations

Qualitative researchers are guests in the private spaces of the world. Their manners should be good and their code of ethics strict. (Stake, 1994, p.244)

Asking teacher leaders to share their experiences in leading for change and in negotiating identity came with risks. Although I might hear about successes and a sense of accomplishment, instructional teacher leaders could also share private concerns, express feelings of self-doubt, or touch on sensitive issues with both professional and moral overtones. Volunteers were given clear explanations about the kind of involvement expected of them, what would be done with the data, and any inherent risks. Thus, informed consent was sought and secured from each instructional teacher leader in this case study research. Interview volunteers were informed that the purpose of the study was

to shed light on the role of the instructional teacher leader, not to evaluate or rank their performance. They were also told that the data collection process would involve regular interviews as well as some email correspondence. Participants were aware of the fact that they had the opportunity to pull out of the study (and withdraw their data) and at any point up until when the data had been integrated into a cross-case analysis. Furthermore, I made sure that the instructional teacher leaders knew that they would be assured of privacy, anonymity, and confidentiality. The data, observation forms, and transcripts would be stored in a safe location. Names of participants and institutions would be changed and identifiers removed. Furthermore, information shared would not lead to harm or embarrassment for those who participate in the study. Those who wished to take a larger role in the research (for example: participating in joint presentations) may waive their rights to anonymity.

In addition to obtaining written, informed consent, I was also vigilant about providing clarity: what the research was about; who it was intended for; what the teacher leader's role in it was; what were the teacher leader's rights in the research process; and how the research would be reported. I was careful to follow protocol; informing, consulting, and gaining permissions from the school, district, and province authorities.

By informing teacher leaders I endeavoured to assure them that they would be treated respectfully and ethically. I also endeavored to be transparent and respectful throughout all the phases of this research study, in observing, interviewing, examining, analyzing, reporting and disseminating. In interviewing, I was careful not to judge or nudge. My role was to gather their accounts and preserve their voice. If a participant overstated a concern or provided an interview that was coloured by emotion, I checked with them at the end of the interview to see if they still wanted to include all aspects of the interview. In examining, analyzing, and disseminating the data and findings, I was careful to respect the participants, their colleagues and the children, schools and districts they served.

The Research Process in Action

Case study interviews.

At the February 2013 AISI Annual Convention, I made a presentation on teacher leadership to an audience of educators involved in school improvement. At that time and with the consent of the AISI director, I made an appeal to the audience for volunteers to participate in my ongoing research. Approximately twenty educators came forward and provided names and email addresses; they were interested in participating and specifically in sharing their stories through an interview process. After reviewing these twenty applicants, ten were selected and approached to participate in the research. The participants were selected on the basis of roles, experience, and availability. The ten individuals selected included people new to the role and very experienced in it, people nearing retirement and those who were relatively new to teaching, people who worked in very rural schools and those who served in large urban centers. After securing their contact information and consent, I also needed to secure permission from each of their districts to conduct my research interviews with each of them. This was done.

Due to imminent or ongoing reassignments (to classrooms or school leadership positions), all of the interviews took place within a six-week period, from the middle of May 2013 to late June of that same year. In most cases, I conducted the interviews by visiting the instructional teacher leaders in their own school districts or at places that were mutually convenient. In two districts a small conference room was made available at central services in which the interviews could be conducted. Over a two-day period in one district and a three-day period in the other, I was able to conduct four interviews with each of the seven instructional coaches (28 interviews). With the three lead teachers who also participated in this study, arrangements were slightly different; these interviews took place at a mutually convenient locations and were conducted over one or two days depending on the circumstance.

The interviews themselves followed a predetermined format. Based upon the working model, I crafted a series of interview templates on the four specific themes: (1) Becoming an Instructional Teacher Leader (initiation), (2) Working as an Instructional Teacher Leader (roles and responsibilities), (3) Living as an Instructional Teacher Leader

(relationships), and (4) Reflecting on Instructional Teacher Leadership (significance). (The interview templates can be found in Appendix Three.)

The interview process presented an opportunity to do more than collect data; the interviews allowed for personal and professional introspection, reflection, and analysis. The open-ended questions were structured to encourage a loosely-guided exploration of impressions, events, practices, and beliefs. Fontana and Frey (1994) assert that such an informal approach is characterized by: “give and take” and “empathic understanding” and is more “honest, morally sound, and reliable, because it treats the respondent as an equal, allows him or her to express personal feelings, and therefore presents a more ‘realistic’ picture than can be uncovered using traditional research methods” (p. 371). This did not mean that the interviews were informal chats or “coffee socials”, as van Manen (1997) points out, “the interview process needs to be disciplined by the fundamental question that prompted the need for the interview in the first place” (p.66). Hence, interviews templates were developed based upon the themes that emerged from literature review (motivations, qualities, roles, challenges, impacts and optimal conditions). A complete listing of the questions asked during the interviews can be found in Appendix Two.

The interviews were also influenced by my own experiences as an instructional teacher leader. I found it was impossible to take the stance of a detached researcher. Along with the literature review, my own experiences helped inform the generation of interview questions. As well, during the interviews there were moments when my previous experience as a teacher leader prompted corollary questions for clarification and explication. However, I was careful to focus each interview on the individual and on his or her experience. I was mindful not to project my own experiences, beliefs, or judgements into the process. I saw these interviews as opportunities to explore new patterns of thought; the instructional teacher leaders could share experiences and contexts that were quite different from my own.

Although I did not act as a *participant observer* (I was not present while the participants worked with teachers and students), my research stance was similar to that of a participant observer. As Bailey (2007) pointed out, participant observer research implies an epistemological belief that what is learned does not exist independently of the

researcher (p. 54). In fact, the lived experiences of the researcher and his or her connections and beliefs often add several more rich layers to the research. Researchers with significant experience in the field can help to establish credibility, validity, and trustworthiness by drawing correlations. With this in mind, I believe my experience as an instructional teacher leader added to the research and did little to detract from it.

The interviews were carried out in a professional, yet friendly atmosphere. After I reminded participants of their voluntary participation and the opportunity to opt out at any time, participants were asked questions following the script suggested by the templates. As was suggested by Seidman (2006); I made an effort to: listen more and talk less, follow-up by asking for clarification (but being careful not to probe), avoid leading questions and instead ask more open-ended questions, and tried not to interrupt (p.78-86). When instructional teacher leaders gave their accounts they were often encouraged to explain further or to provide descriptive examples. Often interviewees would move directly into topics and questions that were planned for later in the interviews. If this happened they were not interrupted but encouraged to continue and I often dropped questions planned for later in the session, if I felt they had already been answered.

Interview analysis; coding, sorting, correlating and discovering themes.

The study's cross-case analysis provided a diversity of samples and perspectives, a correlation of evidence, the saturation necessary to make meaningful assertions, and a wealth of public descriptions that enabled the description of each of the four adaptive processes that were identified as the various dimensions emerged. In the analysis of data, sub-categories were established that captured the relevant characteristics of the event, anecdote, idea or suggestion (Merriam, 2009, p. 205). In this way, the data analysis followed what Merriam calls "Analytic Induction" whereby a general understanding of phenomena is sharpened by continually revisiting a hypothesis or viewpoint. By continually revisiting the data set, selecting and sharing rich accounts of the teacher leadership experience, and connecting this to relevant research, my study has unpacked and shared various ways in which all ten participants negotiated their identities, forged relationships, and fulfilled their mandate change agent. In this process I followed the recommendations of Merriam by allowing the data to inform the category construction and

the naming of categories (2009, p. 178-184). In framing categories I endeavored to: be responsive to the purpose of my study, and construct categories that were informative, exhaustive, mutually exclusive, sensitizing and conceptually congruent (p.185-186). In framing the categories, I found it especially challenging to ensure the categories were mutually exclusive and to ensure that each category represented phenomena or processes that could be described in simple and straightforward ways.

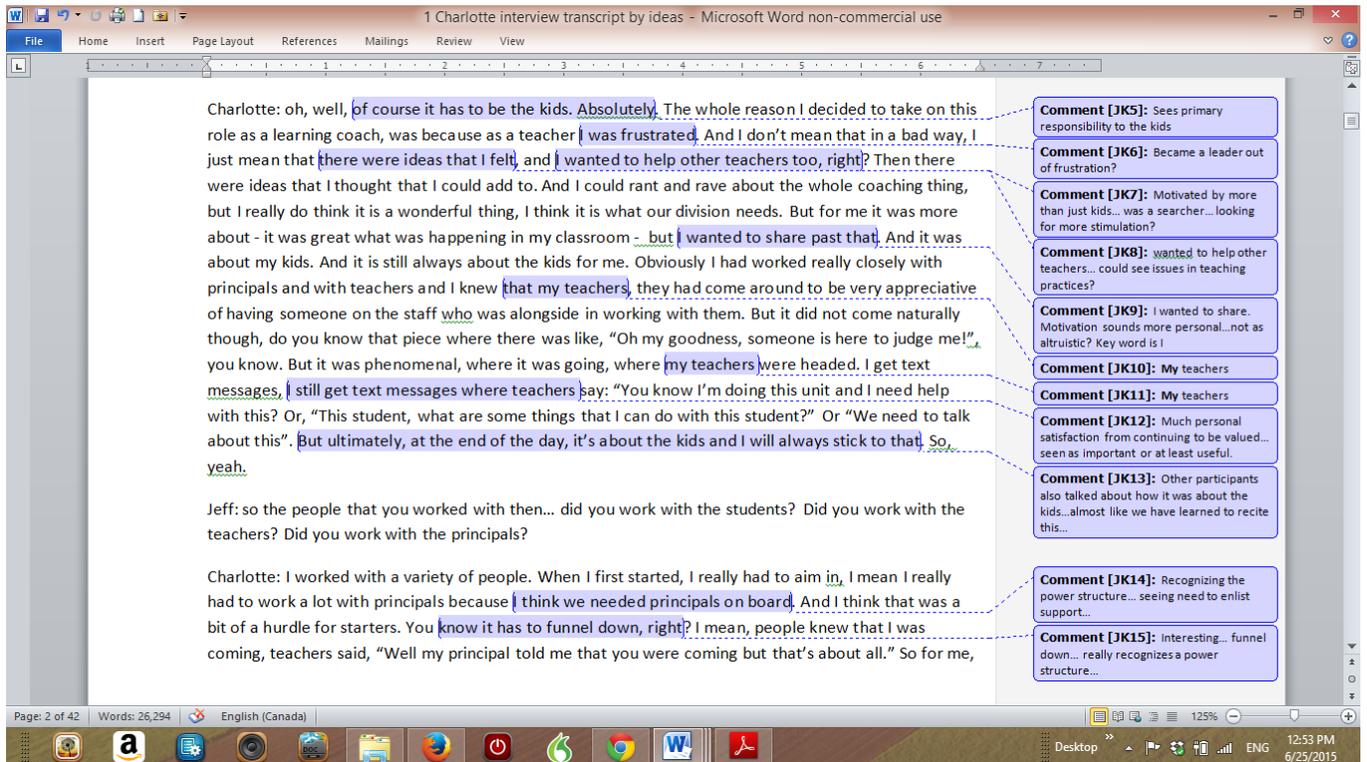
For data-handling and procedures I established a case study database and I maintained a clear chain of evidence (Yin, 2009, p. 118-124). I was not privileged to have access to computer software for qualitative analysis, but I organized and sorted the data in much the same way, putting data and sets of data into bins that might be reorganized and reconfigured as themes emerged. The complete process for handling and analyzing the interview transcripts is described in the following paragraphs.

The interviews were recorded as MP3 files using a small voice recorder. In July and August 2013, I transcribed each of these interviews into Word documents. The result of this transcription was over 500 pages of single-spaced text. The transcription was aided by the use of a voice recognition program. The voice recognition program would not recognize voices other than my own so I would listen to the interviews and repeat them, word for word, so that they could move from speech to text. This process required many stops and starts as I worked to be as exacting as I could. A side benefit was the fact that, even before the analysis was to begin, I knew the transcripts well. Once each participant's transcription was complete, I replaced the names of the participants with pseudonyms and I did the same with any colleagues or schools and districts mentioned in the interviews. The original voice recordings and the original transcriptions were then stored in an encrypted folder on a secure drive. There were no physical printouts of any of the transcriptions that included the actual names of the participants.

Once all the interviews were transcribed I carefully read each interview transcript for overall understanding and kept rough notes about interesting themes and issues that were emerging and some notes on each of the participants (Seidman, 2006, p117-118; Merriam, 2009, p.173-175). Figure three below (a screenshot) shows how I closely read and made notes on the interview transcripts using the comment feature on Word. When

the interviews were coded and sorted, the comments travelled with the segments into the “bins”, which were word files that were broken up into sections with predicted and emergent themes.

Figure 3: Close Reading and Annotating



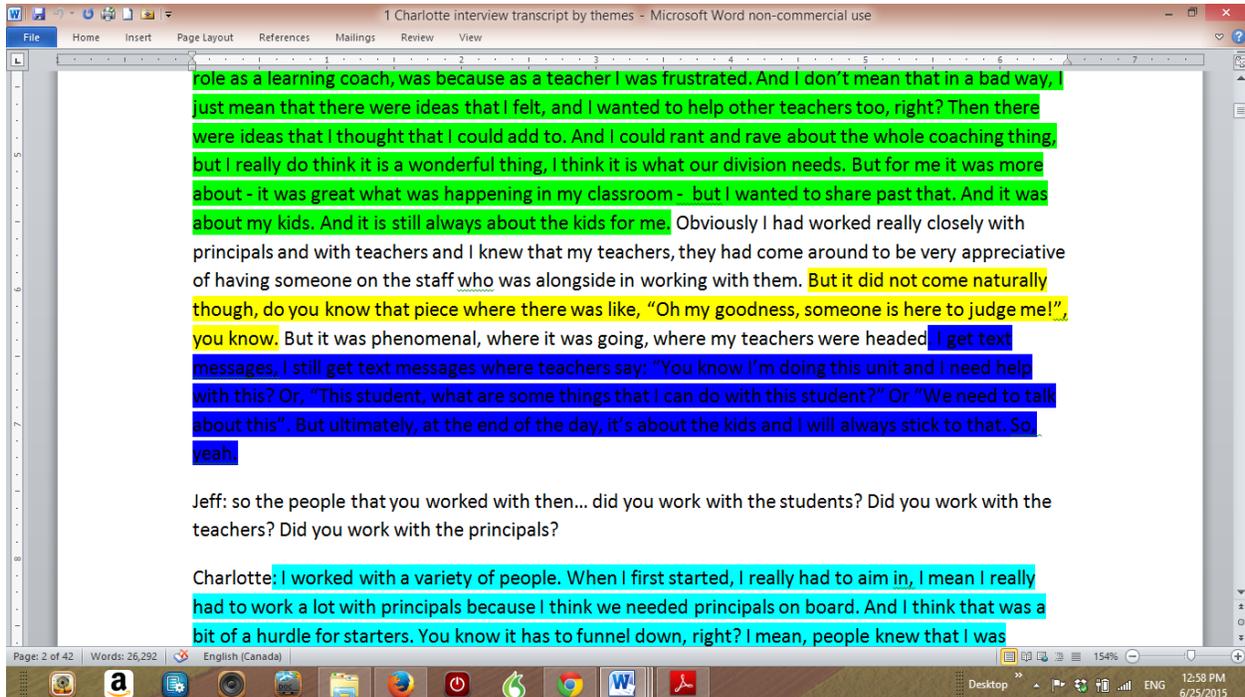
After reading through all the transcripts, I went through each interview colour-coding (using the highlighting feature in Word) according to specific themes suggested by the literature. The themes were as follows:

- Motivation - choosing to be an ITL (influences, aspirations) (green)
- Values (red)
- Identity - transitioning to ITLship (changing identities) (yellow)
- Relationships - negotiating roles and bartering services (teal)
- Support – feeling ready, supported, empowered (violet)
- Challenges – dealing with issues related to project implementation (time, resources, money, travel...) (light grey)
- Resistance – dealing with skepticism, reluctance, resistance (grey)
- Self - efficacy – feeling like you made a difference (dark yellow)

Figure four below (another screenshot) shows how Charlotte’s transcript was coded according to motivations (first highlighting – green), identity (second highlighting –

yellow), efficacy/feeling needed (third highlighting – blue), and relationships (fourth highlighting – teal).

Figure 4: Coding Transcripts



After colour-coding the transcripts of each participant in the case study, decided to write a summary profile on each of the interviewees. This profile helped me understand the individual accounts and see each instructional teacher leader independently and their accounts as whole stories before I coded, sorted, and compartmentalized them. I decided to do these summary profiles after reading Seidman (p.119-125) who suggested that the creation of descriptive narratives provides the opportunity to present the participant in context, explore broader themes, and provide an alternate way of knowing. After I sorted the data and started cross-case comparisons, I found that I would often return to the profiles to remind myself of each individuals context and the reasons they may have had for responding the way they did.

Once transcripts had been analyzed in this way the data was reorganized according to the themes, and significant, attributed quotes and insights were copied and pasted into the case study database files so that they could be examined in light of the responses of

other participants in the process and to substantiate themes and generate assertions (Stake, 2006). The foci from the original working model—becoming, working, living, and reflecting—were originally used sort the data into broader categories or bins. The four foci served as a loose framework in which to organize the data, develop themes, present assertions and substantiate these using examples and quotes from the ten subjects.

Throughout this analysis I continued to make both inductive and deductive observations and generalizations (Merriam, 2009, p. 181-185). These observations eventually facilitated analysis that was more theoretical as I discovered and worked with a number abstracted representations and categorizations for the adaptive processes I encountered in the accounts. At this point data sometimes shifted from bin to bin. The four original processes could now be reinterpreted, reshaped and redefined as four interactive, iterative and recurrent processes. These four emergent processes eventually became the Instructional Teacher Leadership Adaptive Process Model. During this process, the data within the bins were constantly re-organized as various sub-processes were suggested by the participant accounts.

As the four interactive processes became clearer and the sub-processes more defined, I shifted from a balance of inductive and deductive analysis to deductive analysis alone. The crystallization of categories (processes and sub-processes) required theory testing so that assertions and generalizations might be made.

Reviewing individual interviews before cross-referencing data and coding brought to light two important realizations: (1) instructional teacher leadership is highly contextualized and dependent upon the individual, the teachers they worked with, the sites where they worked (school or district), and the overall plan for the improvement project they were working on; and (2) individual instructional teacher leaders each develop strategies for taking on the role and for persevering in it. How instructional teacher leaders dealt with their contexts and employed coaching or collaboration strategies revealed much about the individual's sense of efficacy and agency. While some instructional teacher leaders focused on the possibilities in their work, others fixated upon barriers that were outside their control.

Summary of the Participants

There were ten participants in this study and they came from across Alberta. It was not my original intention to have such a large number of instructional teacher leaders participating in interviews. I believed that a smaller number of three to five teachers would have provided enough data to carry out a significant inquiry. However, the people who volunteered were extremely interested in participating and in sharing their insights. Perhaps this was partially due to the fact that AISI was coming to a close; in their interviews several of the participants shared a desire to give their account before AISI passed into distant memory. To honor the willingness of these teachers and to avoid the awkwardness of choosing one person over his or her colleague, I decided to interview all ten. I explained to the participants that I might decide to transcribe the interviews of only a select few participants or I might choose which elements from each of the forty interviews that I might transcribe and use. In the end, I found myself transcribing every interview and almost every word. I felt that all of the participants provided rich and powerful accounts, and I did not want to exclude any of them.

Each participant volunteered to partake in four semi-structured interviews (see guide in Appendix Three). Seven instructional teacher leaders opted to conduct their interviews over two longer sessions rather than as four separate hour-long interviews. The combined series of interviews for each participant lasted, on average, approximately three and a half to four hours. Some of the individual interviews series were completed in only two and a half hours (Maria) and one took well over five hours (Elizabeth). The interviews were friendly, frank and professional.

Within the group of ten instructional teacher leaders, there were actually three different types of Instructional Teacher Leaders:

- The first group (Maria, Anne, and Elizabeth) worked only in their home school and were given limited time and resources. These individuals remained classroom teachers, taking on the role of **lead teacher** on a .1, .2, or .3 full-time equivalent basis. Each of these lead teachers came from different districts
- A second group (Jane, Charlotte, Caroline, and Mary) were instructional teacher leaders given a full-time **learning coach** position and assigned to work only in two schools (one being the school they had been seconded

from) and with only four teachers each. These four coaches worked in the same district and were part of a larger team.

- A third group (Will, Catherine, and Louisa) worked across their division in a more spontaneous and incidental fashion. These instructional teacher leaders were known as **district instructional coaches** and were asked to lead the reform in five or six schools each. These coaches were not assigned to or matched with any teachers in particular, and they were left to figure out how to go about building relationships so they might get invited into classrooms. These three coaches worked in the same district as part of a larger instructional team.

For the purposes of this study I will sometimes focus on one group of the instructional teacher leaders and compare them to the others. Often I compare the experience of the three lead teachers with the seven instructional coaches because the lead teachers had to deal with the challenge of being classroom teachers as well as teacher leaders, while the coaches were responsible for supporting teachers in more than one school.

Each of these educators had his or her story to tell; and, although this study is intended to look at the broader case of the instructional teacher leader, I felt it was important to convey the individuality and context-boundedness of this particular phenomena or case. I wanted to present each of the ten participants as people and not as fragmented subjects to be studied; to present their individual circumstances as well as their personal aspirations, challenges, and insights. With this goal in mind, I have included a summary profile (Seidman, 2006) of each of the participants in Appendix Three. In order to make them more accessible, the summary profiles are written in a descriptive rather than analytic style; they do not contain very many direct quotations (these were saved for the cross case analyses in chapters five through eight). In the summaries I briefly describe (1) some of the key characteristics of the person (age, background, training, experience, etc.), (2) leadership motivations and local circumstances (personal and institutional interests and needs) (3) the type of work they were engaged in (mandates, roles, tasks, and strategies), (4) how they experienced leadership (challenges, successes, professional and personal impacts) and some of their perspectives on instructional teacher leadership. As

the appendix is intended to provide additional information and context for the study, there may be some overlap between the individual summaries and the cross-case analyses.

I have also included as a summary, support, or a quick reference guide; a two page matrix that describes these instructional teacher leaders, what position they worked in, what levels of education and experience they have had, and includes some of their more memorable quotes which can be found on the following pages (pp.102-103). However, my research was not intended to focus on one or another's individual experience as an instructional teacher leader.

Summary

This chapter outlined the research methodology for this study of instructional teacher leadership. For the purposes of this research, I chose to carry out a qualitative case study with ten instructional teacher leaders. I thought that the best way to capture the lived experiences of instructional teacher leaders was to gather their motivations, insights, and stories through case study interviews. Cognizant that case study research is often criticized for lacking validity and reliability, I sought to establish trustworthiness and credibility by drawing on the experiences of ten different instructional teacher leaders, developing a frame to organize the interview templates and data analysis, and establishing clear and transparent procedures for data collection, analysis, and interpretation. The chapter also explained how the interviews were carried out and when, and the care that was taken with the resultant data (recording, storage and analysis procedures).

The fifth chapter, Clarifying, focuses upon the ways in which instructional teacher leaders took on the challenge of change leadership. It discusses how these educators continually accessed support and worked to develop efficacy, gain confidence, clarify the role for themselves and others, and shape a teacher leadership identity.

Table 2: A Matrix of Individual Cases

Name	Educ.	Yrs exp	Grade levels taught	Current Role	Yrs as ITL	# of sch	Rural, urban or suburban	Other previous roles	Quotes:
1 Charlotte	B. Ed.	6 yrs	8-12	Learning Coach (1 yr)	1	2	rural	Special needs, curriculum coordinator	<p>"Let's give this a go!"</p> <p>"I have to wear different hats; let me know which one you want me to wear now."</p> <p>"Remember, I'm only 27..."</p> <p>"I mean for me in the schools that I was in, there were closed doors, people didn't work necessarily in teams – they thought that they were working in teams – but they weren't sharing anything. Their idea of sharing was, "Here is my 1980's binder, use it, photocopy.""</p>
2 Catherine	M. Ed.	22 yrs	K – 5 Mostly K	Instructional Coach, AISI Coordinator (4 yrs)	8	4-7	suburban and rural	Kinder coordinator, Special Education	<p>"...use the data as a third point" "...keep at it and develop a network..."</p> <p>"...if you are clear about your role and the purpose of the project, and you are invested, you can make it work. But if that understanding of what your role is, and your responsibilities, if you can take care of that part then the other parts can fall into place."</p> <p>"I didn't know that that's what I wanted but as my roles changed and grew that yes, having a say, and being at the table has become essential for me. I can't be just buried in my own classroom anymore I need to be at the table and in that conversation; making sure that my voice is heard."</p>
3 Caroline	M. Ed.	9 yrs	7-12 MA SCI	Learning Coach (1 yr)	6-7	2	rural	Lead teacher literacy, numeracy, DI, assess	<p>"...if all we ever do is talk about it, it will never get to the kids"</p> <p>"rural kids deserve the same opportunities"</p> <p>"There are a lot of layers to being a teacher leader."</p> <p>"And I understood that not all teachers were going to be jumping on the bandwagon. Or why some teachers were feeling toxic about education, given their own experiences."</p>
4 Anne	M. Ed.	21 yrs	K-12 Mostly HS	Department Head – Lead Teacher (1 yr)	21	1	urban		<p>"Instructional teacher leadership is about being persuasive"</p> <p>"Just don't be confrontational. Expect the unexpected"</p> <p>"But if you hit the right people with the right buzzwords, they will be interested and then they will be much more supportive ..."</p> <p>"So you kind of have to know your audience, and figure out what will make them do what you want them to do."</p>
5 Elizabeth	M. Ed.	15 yrs	3-9	Lead Teacher (13 yrs)	13	2	rural	Gifted and Talented	<p>"...you have to be a learner yourself...but it has to be a discerning learner..."</p> <p>"I could stand up for what was important."</p> <p>"When that community school is good or bad, or when something happens with those kids, it affects me because it affects my community."</p>

Name	Educ.	Yrs exp	Grade levels taught	Current Role	Yrs as ITL	# of sch	Rural, urban or suburban	Other previous roles	Quotes:
6 Mary	B. Ed.	27 yrs	K-3	Learning Coach (1 yr)	13	2	rural	Lead Teacher	"...the kids were the most important stakeholders for me; always the students." "I really think you need to know the reality; you can't come in with a lot of theory." "You don't have to be an expert though..." "...oh no, I'm not observing the teacher - I am observing the kids."
7 Maria	M. Ed.	22 yrs	4-9	Lead Teacher (3 yrs)	20?	1	suburban	Special Education	"...content is the easy part to master, it is people's beliefs and attitudes and values that are more important than content." "...I had to step up, and speak up, and say this is part of the school division's goals, you have to give me this time." "...if you are colleagues though, you have to have that professional relationship ... and you have to get to that."
8 Jane	B. Ed.	7 yrs	2-4	Learning Coach (1 yr)	5	2	rural	Educ. Asst. Lead Teacher	"I think what I was trying to get it to, was authentic learning." "I want to know where those parameters are for my role." "... because if you look at each of the coaches, their role in their schools looks very different from each other." "I believe that looking at the data and removing yourself from it and being willing to say "Look this is working and this isn't working; it says so right here!" will push us to try something different." "... it is in the celebrations. I think mapping and recognizing where they were and where they have come to in a particular area or a particular cause and then sharing out and celebrating it."
9 Will	B. Ed	20 yrs	4	Instructional Coach (4 yrs)	4	4-7	suburban rural	Special Education	"...that was the game changer; providing time." "It's like Gollum and the ring you know; you stay away from my time, my precious time." "You know, teachers like what you do, teachers appreciate what you've pulled together - or sometimes they will politely trash it - and you just can't take it personally." "I don't want to be perceived as an egghead or an intellectual. "Oh you don't really know anymore, what it's like to be in the classroom!""
10 Louisa	B. Ed. taking M. Ed.	10 yrs	7-9	Instructional Coach (4 yrs)	7	4-7	suburban rural	Lead Teacher	"...I think if you don't have a sense of empathy, you are not going to get a whole lot of people onside." "... if I'm passionate about a project or an idea, then it is easier to get people to come on board with me." "I think the best training a coach can do is actually just sitting down and working with people." "I didn't really feel like I was mentoring; I felt like I was partnering. I mean, it is called "coaching", but our team even felt uncomfortable with the word "coach"."

Chapter 5: Clarifying

Defining the Role and Shaping an Identity

This chapter is the first of four in which the ten cases are discussed according to cross-case themes as suggested by the Instructional Teacher Leadership Adaptive Process Model. Building on what was discovered upon reviewing each participant's set of interviews (see appendix 3), I now seek to establish the "case" of the Instructional Teacher Leader by using the four concurrent adaptive processes as an organizational frame. I would suggest that in experiencing the roles, responsibilities, challenges, and rewards in leading school improvement initiatives, instructional teacher leaders (1) clarify their roles (for themselves and for others) and develop a teacher leadership identity (chapter 5); (2) engage students and teachers in meaningful, transformative work (chapter 6); (3) respond when faced with organizational and relational challenges (chapter 7); and (4) reflect upon their work on a regular and purposeful way (chapter 8).

The adaptive process to be examined in this chapter is Clarifying. The ten case study participants all experienced this process in various ways. The process of clarifying, as it emerged from the transcripts, focused on how the individual teachers made sense of the adjustments they would have to make to become and continue to serve as instructional teacher leaders. As they learned about the nature and scope of their work, the instructional teacher leaders had to clarify what instructional leadership meant to them, to visualize how it might look, and to understand it well enough to be able to clarify it to others (teachers, students, administrators, spouses, friends, etc.). The clarifying process started the minute each of these teachers entertained the idea of becoming an instructional teacher leader and continued right until the time of their interviews. Every time these instructional teacher leaders met a new colleague, attended another workshop, visited a different classroom, or confronted an emergent issue, they had to make adjustments to clarify their purpose, role, and identity and sometimes to re-define or re-imagine each of these in light of the new information, interactions, or circumstances. Several of the participants confessed that they were still refining and defining (clarifying) their roles, even as they continued to work with teachers for a third or fourth year.

For the purposes of this chapter, and in alignment with the Instructional Teacher Leadership Adaptive Process Model, I have organized the chapter into four sections: (1) Clarifying Motivations, (2) Clarifying Mission and Roles, (3) Clarifying Purpose and Gaining Confidence and (4) Clarifying Responsibilities. In each section, I will explain how these instructional teacher-leaders had to clarify their mandate and role and develop an instructional teacher leadership identity as they went through these sub-processes. It is important to note that, while clarifying might be seen as the first of four adaptive processes instructional teacher leaders go through, it must be acknowledged that during my study with these instructional teacher leaders I learned to see the process as iterative; each time an instructional teacher leader took on a new challenge, another colleague to mentor, or a new school to support they needed to go through the process again.

Clarifying Motivations for Becoming an Instructional Teacher Leader

Not every teacher necessarily aspires to becoming an instructional teacher leader. Many are content to spend their entire career teaching in the classroom. However, for the teachers in this study, the classroom was too confining. These teachers looked outside of their classroom at the possibilities that exist for both teaching and sharing.

There has to be more that I can offer in the education field than just what I'm giving to my kids in my classroom. I mean, it's not that there's not value to what I was doing in the classroom but there has to be more.... (Catherine)

I was always very enthusiastic about those things. I felt compelled, and I was also filled with professional obligation to stay educated to stay involved to see what was out there and see what the possibilities were. What can change and what can be done better, and what the research is telling us. And so I stepped up into those things because I felt I was energized by it. (Mary)

When the opportunity was presented to these ten teachers, all of them chose to take on the additional challenge of leading within a school improvement initiative. I wondered why and how they made this choice. Were there factors that pushed them to take on the task? Or were they simply at a place in their career where they needed a challenge and a chance to make a difference? In the process of learning about their respective situations and motivations I learned that considering and taking on the role of instructional teacher leader was often a gradual process. The process was sustained through mentorship,

professional learning, encouragement, some risk taking and a great deal of introspection about the needs of the students, their colleagues and themselves. And, all the way through the process the instructional teacher leaders had to continually search for clarification – defining and redefining the role as they learned more about it.

Being invited, conscripted, or choosing to opt in.

To learn more about their respective contexts and choices, I asked the ten instructional teacher leaders that took part in this case study to describe the particular moment when they moved into teacher leadership. Were these teachers invited to become instructional leaders? Were they challenged or conscripted into this position? Or, did they respond to an advertisement or perhaps to a particular need in their school community?

When I began the study, I assumed that looking at these teacher-leaders' unique circumstances would inform our understanding of the motivations, contexts, and obligations experienced by these instructional teacher leaders. As expected, the participants in this study offered a wide variety of answers to the questions above. Several instructional teacher leaders pointed to a moment in time when their principal or someone from board office gave them a nudge, and invited them to apply for a lead teacher or an instructional coaching position. Others cited circumstances in their home school which compelled them to step into a position and provide instructional leadership to their colleagues, often as a result of a lack of leadership from their administration or a leadership void created by teacher movement:

My leadership experience beyond that was that we went through seven principals in five years in our school. And in that process both of the assistant principals also retired. They had been there for 30 years. So, in terms of trying to keep AISI a priority, trying to keep the school moving in a certain direction, I just found myself in the office knocking on the door saying "Hey, what are we doing here? What shall we do with this? Did you know about this?" (Caroline)

We had seven [experienced teachers] depart in one year. And this was pretty hard on me because I was left behind. And it's like, "Okay, now what am I going to do? Where's my group?" I always work well in a group. And the next September, I thought, well, I can either hibernate in my classroom, or I can continue to do good things for the building. So then I thought, well I'm going to continue. Whether it's scary or not – do one thing scary every day and charge forth, and just run these things myself. (Catherine)

However, most instructional teacher leaders had a difficult time making the distinction between being invited, being conscripted, or freely choosing. For example, Jane related her experience in taking on an instructional leadership role:

I was offered the opportunity to take part in the training the year before and we went to the application process for that, and the interviewing process and the hiring process, and that was a challenge for me. It was an obstacle that I didn't actually initiate; it was, it was brought to the table and insisted that I apply. I was told to volunteer. And I think it's because I don't see those qualities in myself. It was other people around me, thank goodness, who saw them in me. And the people that encouraged me knew that about my nature. They knew I needed a little bit of a prod once in a while; I won't just stick myself out there unless I know that it is going to be a safe environment. (Jane)

Jane's account shows that her entry into instructional leadership was really a combination of invitation, conscription, and application. She was free to apply for this position, and she did so, but only after she was coached to do so.

In the process of conducting the interviews, I learned that trying to describe the moment a teacher moves into instructional teacher leadership in terms of invitation, conscription, or choice is not productive: the decision process is not something that can be reduced to a multiple-option survey question. The process is more complex. Most teachers said that their move into teacher leadership really could not be attributed to one moment in time or one circumstance. Instead, these instructional teacher leaders described the moment as a gradual process; something that took months or even years:

It happened through growth and progression; I just kept making a point of finding out what was going on. I was very curious; I just didn't want to stay inside my own little classroom. (Caroline)

I would say that I moved into instructional leadership in a gradual process. At the end of my second year of teaching the principal commented that there was an opportunity to do work with AISI on their numeracy project. He said "I think you would be very good in this role, would you mind if I put your name forward?" And that was kind of the beginning of it. And that was almost 7 years ago. (Catherine)

I think my administration saw my enthusiasm and started to create those opportunities that I just mentioned, the opportunities to attend PD or join in any sessions. Like encouraging someone to invite me to these particular workshops, so I got a little bit of extra PD. Encouraging someone to pass off books to me, or articles to me. And I didn't really realize that I was being mentored. And then, halfway through the year I suddenly realized, "I wonder if they have me in mind for something for next year?" And then later on, I found out about the lead teacher opportunity, and it was offered to me by my

principal, with the support of Cindy, my eventual partner. There was no application or anything like that. So it was a weird process that I didn't really realize was happening until I was in the middle of it. (Louisa)

What is striking in these three examples is that the instructional teacher leader needed some coaxing. In fact, six of ten instructional teacher leaders could point directly to an advocate; someone who recognized their abilities, mentored them, or challenged them to expand on their current circumstance. In addition, several teacher leaders said that they were already in an environment that encouraged professional development and teacher leadership. Elizabeth regularly referred to her first principal who challenged her to become an instructional teacher leader in only her first or second year of teaching. This principal went out of his way to send her to district meetings on gifted and talented education, put the right books in her hands at the right time, and challenged her with thought-provoking questions. As a result, Elizabeth was invited into the world of professional growth by a mentor who constantly challenged himself in the same way:

What it was very much about was, if he [the principal] believed in me enough to ask, then I must have what it takes to do the job, from a psychological viewpoint. So it was good to have that validation. He didn't pick anybody else; he picked me and he gave me the tools to be successful, because no one left under his care was left to be unsuccessful. So I just knew it would be okay. (Elizabeth)

However, while many of the instructional teacher leaders could point to advocates who encouraged them to become instructional teacher leaders, several confessed that these advocates simply recognized qualities and passions that would have eventually led to instructional leadership roles anyway:

I don't know. I don't think it was just that I had time - so let's push her into this role. I think it was my initiative to try new things and my openness. And so I'm not one to say "No, I'm good the way I am!" I do like to try things, so I think that they saw that. (Louisa)

So that passion I had to make things better for kids, I think just continued to drive the conversations that I had. And it moved me to start knocking on doors, and asking: "What are we doing for the students? How can we adapt the timetable so that we can alleviate the pressures, and give students a choice?" And that's where this principal came to me in my second year and said, "You know I can see you being a part of this." And so I took the opportunity to join when it was there. (Caroline)

These last quotes affirm the kind of initiative Portner and Collins (2014) have emphasized most informal teacher leaders have; teacher leaders emerge when they see an

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opportunity or notice a need (p.46). They hold a vision, welcome opportunities to grow in their understanding, and feel committed to sharing what they have learned with their colleagues. This description of teacher leadership was certainly applicable for all ten instructional teacher leaders who participated in this study. Although each teacher had taken a different road to teacher leadership and many had to have an extra nudge to join in formal teacher leadership, they were, in actuality, all ready to take that first step. They had the inclination to learn more, a sense of adventure, and were looking to take on a challenge.

Acknowledging personal and professional motivations.

Like several others in this study, Will was a teacher who actively resisted going into leadership. He said that he would “never, ever touch administration”, “not with a 20 foot pole”, but at the same time he felt restless and frustrated as a teacher. He observed poor practices, ineffective teachers, and even started to feel like he was becoming complacent in his own practice. Then one night it all changed for Will:

And the realization came to me when I was shovelling snow one night, because that’s what we do if we live in Alberta—we shovel snow. And it occurred to me, I still remember the moment, I’m shovelling, I’m shovelling, and I’m mad and suddenly I think “Why not me?”, and I stop. It was like this was a “eureka” moment; it just washed over me. And all the past sentiments of: “No, I’ll never leave my classroom - I don’t want a teacher leadership role, just leave me alone and I’ll teach!” I saw where they were actually leading me. They were actually causing me to allow dumb decisions to continue being made. I was letting things continue because I didn’t get involved. (Will)

Not every teacher who moves into a leadership position goes through as dramatic and memorable transformation as Will did. Many moved into leadership in much subtler and incremental ways. However, Will’s experience revealed much about his commitment to the profession and his need to make a difference:

I wanted to be able to make a difference and to make teaching better. And to look around, and say “There has to be a better way to teach that kid, without just simply giving them 100 multiple-choice questions and to essay topics for their midterm just to keep them busy so they won’t disturb you while the other kids are writing.”

Will’s sentiments about making a difference were echoed by many of the other instructional teacher leaders interviewed. In fact, for most of the instructional teacher leaders the overriding motivation to move into change leadership had to do with their

commitment to making a difference for students and schools. However, there were many associated or sub-textual reasons for stepping into instructional leadership. To get a more complete understanding of the various motivations, each participant was asked to explain how much they were motivated by six different factors: recognition, exploration, self-improvement, community, agency, and networking.

Recognition.

The ten instructional teacher leaders in this study indicated that personal and professional recognition was the least important of the six factors. Nine said that recognition didn't factor into their decision at all. These teachers were not looking for extra attention or even more money. In fact, several participants pointed out that taking on this leadership role meant only that they would have to do more work, have more responsibilities, and that they would remain on the same pay grid as any other teacher; and, that was fine. Only one instructional teacher leader, Jane, said that recognition was a factor at all. Jane's response to this question shows a mixture of several motivators; duty, agency, and the need for validation.

So, without sounding like a braggart, it was nice to see that my contributions were being valued, and my skill set and my vision was being validated. I think that's part of my motivation and keeping rooted with the students - I knew something had to change, I could see that something had to change and these were building blocks that I could make an impact for students. So I explored the AISI piece and the current learning coach piece, with the encouragement of mentors and other leaders. And they have, I said to my principal just the other day, I feel like my voice is being heard. (Jane)

Perhaps Jane was simply being more honest and candid than other teacher leaders. It was apparent in their responses to other questions that many individual instructional teacher leaders were proud of their achievements, of the connections they had made with teachers, and of some of the supports that they had developed for their projects. However, the eventual recognition of these contributions was not the primary reason they became instructional teacher leaders.

Exploration.

Exploration? Absolutely! I am a lifelong learner and I did my master's degree when I was on maternity leave just because I don't even know what I don't know. There is so much

out there. There are so many opportunities to grow in knowledge and in practice, and the more you can network - which is a factor later - the more you can learn and the more you can share. (Caroline)

When the instructional teacher leaders were asked if exploration (the opportunity to experience new learning and challenges) played a role in their decision to become instructional teacher leaders, each and every participant resoundingly said “Yes!” Will confessed that he was at a point in his teaching career when things were getting too routine. Becoming an instructional teacher leader opened up new possibilities for Will and, once he joined a team of instructional coaches at district office, he gained a new appreciation for research and professional literature.

Anne related a similar circumstance. She, like Will, did not want to go into administration, but she was ready to learn more and “do something different”:

And really, I am sort of at the point in my career where most people leave or go into admin. Because they’re been teaching for so long and they do not want to mark anymore, and they have learned all they’re going to learn and they need to go do something different. I didn’t want to get out of teaching, because I really like it. I do not want to be an administrator; that is not a good thing for me, because I will get fired! I’m not very politically correct! And I don’t want to go do something different, just to get away from the marking. I really like the teaching part, but I wanted to do something different. Because I still cared, right? (Anne)

Louisa also wanted something “different”:

I think the career move aspect was not my main motivation for doing things, but I also think that I would like to do more than just be a classroom teacher. I know that sounds like a negative thing to say, but I could never see myself doing that one thing for the rest of my life. Do you know what I mean? And when I got into this work, I had never really thought past getting my teaching job and getting a permanent contract, that kind of stuff. But once I had that, I thought what other challenges are out there? I wanted to be challenged. I wanted to see what other things were out there. So this was a new challenge, and a way to do all that. (Louisa)

Self-Improvement.

Self-improvement? Yes absolutely. I think every teacher should want to do that. I don’t know, like I said, I still refer to myself as a teacher, and I’m always hoping it will stay that way. (Charlotte)

Closely related to exploration was the notion of self-improvement. Every one of the ten instructional teacher leaders said their own growth as a teacher was a factor in becoming an instructional teacher leader. Louisa even admitted that, at times, she felt a bit guilty about it:

I think that exploration and self-improvement were probably the biggest motivations for me and I have always said one of the biggest incentives for participating in the lead teacher role and instructional coaching role was that it would give you so much more PD. Because I'm a total PD junkie; I want to learn from others and see what is out there. That was definitely an incentive. I'm not getting paid more. I'm leaving a job that I'm really familiar with and that I thought I was doing quite well at. So I think I was being a bit selfish there, because here I am really building my own knowledge and that kind of thing. (Louisa)

Louisa liked to say that she was “selfishly selfless”; she was learning all she could so she could improve her own practice and hopefully the practices of many of the teachers she would be working with.

The importance of self-improvement as a primary motivator really became clear when, towards the end of their interviews, the instructional teacher leaders were asked about their future plans. Since AISI was coming to a close, many instructional teacher leaders would be leaving their district positions as instructional leaders and returning to the classroom full-time. Several instructional teacher leaders confessed that, while they were a little nervous about this, the prospect was exciting. These teacher leaders would now be given the opportunity to “practice what they preached”. They would be able to see how well the research and theory would fit in with the daily demands of full-time teaching.

Community.

And I had loyalty, the school was my world, so that was going to benefit my school, and that was the hill that I was prepared to die on. And he [her principal] knew that, and he saw that, and he cultivated that. So it was that loyalty; I have never not taught in my community. I have spent half my career 13 km kilometers west, and I spent the other half of my career 13 km east. And that's my community, so it matters to me. When that community school is good or bad, or when something happens with those kids, it affects me because it affects my community. (Elizabeth)

When asked about the importance of duty and a commitment to their communities, the instructional teacher leaders were somewhat split. Several instructional teacher

leaders said that duty and community were not major factors in their decisions to become teacher leaders (Mary, Maria and Louisa). Their progression into leadership roles had more to do with their own personal drive and with circumstances. They were not out to change the world or right any wrongs, but were simply trying to contribute. Mary said that: “I didn’t really feel it was my duty so much. Like I said, I think our school, until a couple years ago; we really did work as a team. The entire staff — not that everything was smooth and always perfect. So I never felt like I had to take a lead role, because it was going to fall apart if I didn’t.” (Mary)

However, for several others, duty and community were very important factors. Elizabeth said that she felt a strong connection to the two communities that she had taught in. She said that “these were her people”; she grew up with many of the teachers and parents and could tell you a great deal about families, relationships and the historical challenges involved in bringing reform to these communities. She confessed that she had been ready to fight for quality education for the children in these communities. Anne said that she felt a strong obligation to the students in her school, to her staff and to the school itself. She wanted to see improvement in the test scores on provincial exams and felt like her students needed to be afforded the same opportunities to succeed as any other student in the province. Caroline said she was an advocate for the students, especially for those in rural schools where the staff had to be generalists and students had to learn in environments that needed to be very flexible. Caroline felt that these students needed to be given the same opportunities as others around the province, and she was prepared to fight for this.

For several other instructional teacher leaders the sense of duty was broader than just local school and community. Two leaders in particular, Charlotte and Will, were motivated by a desire to give back to the profession and address poor practices that they saw in their schools and districts. Both teacher leaders had a background in special education; they saw students as individuals who needed differentiated approaches and they were appalled by the one-size-fits-all approaches that their colleagues relied on. Charlotte related an instance where, as a teacher covering a maternity leave, she was handed an old binder full of yellowing worksheets and told to simply follow it. Will cited

examples of teachers just “keeping kids busy” with multiple choice tests and essay assignments rather than using instruction and assessment for purposeful growth. Elizabeth also felt this sense of duty to the profession (in addition to her sense of duty to the community); she felt she had to champion research, best practices, and school improvement—she was obligated to:

Okay I think that—and this is going to sound arrogant—but that there was nobody else to do it. There was nobody else to have those conversations. There was nobody else. So if I don’t do this; who is going to do it? And so I think that is part of it too. Like I had some extremely competent colleagues, I have worked with some amazing people, but not when it comes to this stuff. Not when it comes to defining the research on your own, not when it comes to exploring different options; it was never there. So I think that is part of it too. (Elizabeth)

Agency and influence.

Just as exploration and self-improvement are linked, so are duty and agency. The same instructional teacher leaders who felt an obligation to improve things for their communities were also drawn to instructional leadership roles because it gave them a voice; it allowed them to become part of the decision making process. In addition, these teacher leaders could make choices about their own professional development; what they might research and what they might attend:

I loved it, because I had the answers. Like, if I had a question, not only did I have the access to find the answer, he also gave me the power to go and find it. So my principal had the ultimate authority, but I was now allowed to ask the questions that I was not allowed to ask before. (Elizabeth)

Charlotte said that agency was especially important for her because she “didn’t want to be a sheep anymore”; she saw the potential of learning through the arts and taking a more hands-on approach into the classroom and she wanted to transform the schools and many of the teachers in her district. For Catherine, who progressed through various teacher leadership roles before becoming AISI Coordinator, personal agency and having opportunity to contribute and shape the professional direction for her district became more important as she grew into her roles:

I don’t think that I really knew that I wanted to have a say or impact at the school or district level. I didn’t know that that’s what I wanted but as my roles changed and grew that yes, having a say, and being at the table has become essential for me. I can’t be just

buried in my own classroom anymore I need to be at the table and in that conversation; making sure that my voice is heard. (Catherine)

Jane and Will also said that agency and having the opportunity to share practices and influence others was a motivating factor. Only two instructional teacher leaders did not see agency and the need to influence others as a motivator for becoming or continuing as an instructional teacher leader (Mary and Maria). In addition, one instructional teacher leader, Anne, pointed out that as department head she already had a great deal of freedom and influence and taking on the role of AISI change agent would not change that (although she confessed that it did make her job easier).

Networking.

For most instructional teacher leaders, the need to network was not an initial motivating factor in becoming a teacher leader. Anne expressed that she had a need to find out what other English teachers were doing and Maria shared that she always loved to network, not just with people in her district but with teachers from around the province. Elizabeth said that networking was something she did anyway and that it didn't really change once she became an instructional teacher leader. However, as most instructional teacher leaders grew into their respective roles, networking became an important component of their everyday work and a prime motivator for them:

I never really thought about networking, but it was a bonus. It ended up being essential to our survival in this role. (Mary)

And I didn't know that the networking was as important as I am seeing now. It wasn't something that I considered as a motivator initially but it is definitely a motivator to continue. I have a lot of capacity that I can draw from whenever an issue arises, or if I have a question, or if I need a cohort to "get the ball rolling" in an area. I can make connections to teachers and to other schools or I can gather teams together and I can sure find out answers for people. And generally, within a day, I can get a response from somewhere else in the district. That networking is vital now. I never really saw it before, but I was teaching in a small rural school of 100 kids. So it is motivating to continue. (Jane)

Although he would be going back to the classroom, Will found it vitally important to keep networking with the teachers he had built relationships with:

So how can I continue to network with the teachers that I have worked with? So I'm already thinking that I've got them in various communities on my Google Plus, so I'm doing things and starting processes and I can send pictures and evidence to these people and say: "This is what I'm working on in my classroom and if you want to talk about it we can 'Google Hang Out'; or we can go visit each other at each other's schools again during the day. Whatever. Let's continue this because we believe in it." (Will)

Clarifying Mission and Role while Learning Instructional Teacher Leadership

You know the biggest thing for me, and I didn't realize that after all of the professional development - that I did appreciate it. Although I had learned things about UDL [Universal Design for Learning], and DI [Differentiated Instruction], all those bits and pieces, I would want to put them in a leadership package, and wrap that in that whole leadership context and what it would look like. That was probably one of the most valuable things for me throughout the whole leadership experience, was learning what leadership looks like. You know the different hats, and like everything. And any short workshop that I go to, even if it's like differentiated instruction, or UDL, every time I walk into these I am learning more and I am adding more to my toolkit. I want people to go in and know something of what they're actually talking about. I think that's what it's about... (Charlotte)

All the instructional teacher leaders in this study had received some kind of orientation or education before or during their stint as instructional teacher leaders. This orientation often helped the instructional teacher leaders clarify what their mission was, what kinds of work they might be engaged in, and how to go about working with teachers. For the seven district-based teacher leaders (instructional coaches) leadership orientation may have included workshops and training sessions in cognitive coaching, instructional coaching, and group facilitation as well as some training in the areas their AISI project was focused on (differentiated instruction, literacy, assessment, etc.). For the three school-based teacher leaders, the orientation and training was not as intensive (one week before the school year and ongoing call-backs one morning a month or so) and focused more on the instructional goals of the project. School-based teacher leaders did not have the opportunity to go as deep as their district-based counterparts; the part-time nature of their position and the need to balance their role as a continuing classroom teacher with the instructional leadership role they were expected to fulfill meant that they would sometimes be placed in more challenging circumstances with less preparation.

Knowing that there was quite a range in the kinds of leadership and coaching orientations offered to the instructional teacher leaders, I wondered whether the ten

individuals in this study found the support and preparatory professional learning to be worthwhile and effective. Was their training in instructional leadership worth the investment of time and money? When asked if aspiring teacher leaders should take some kind of orientation or professional learning in instructional leadership before becoming an instructional teacher leadership, Anne responded:

No, I don't think so, I think if you are good teacher, you have all the skills and qualities that you need to be a good leader because you are already doing that. It is just slightly different. But all the skill sets are the same. (Anne)

Anne was using herself as a frame of reference. She had encountered few issues in moving into instructional teacher leadership. Since she was already the department head and her project was limited to working only within her immediate English department—and since she had already developed her own leadership style, Anne saw little need for targeted leadership training. However, when we explored the matter of support, education and training a little further, Anne did acknowledge that her master's studies in Action Research (which certainly qualifies as instructional leadership learning) gave her a leg up when it came to running the project and that she thought such training might be useful (but not necessary) for most instructional teacher leaders.

When asked a similar question, whether she saw training as a necessity and what kind of training would be important, Maria replied:

That is a good question. I do not know if I have a solid answer to that. But I definitely want to say that they've got to have some training in how to develop relationships, because you have to know how to work with a lot of different people. They need something about relationship building. (Maria)

Maria's response was echoed by other instructional teacher leaders. Most instructional teacher leaders felt the role was defined much more by the coaching or relationship aspect than by the instructional focus itself. According to Maria and Anne, prospective instructional teacher leaders would be well-served by learning how to develop "soft skills" so they could build relationships. Some instructional teacher leaders referred to this as "schmoozing". The district-based coaches described this training in more specific terms, because they had formalized training in exactly what Maria and Anne were describing. These coaches talked about relationship building and about how to build relationships

through the acquisition of skills related to cognitive coaching, instructional coaching, group facilitation, consulting, and one-on-one facilitation.

So while the instructional teacher leaders saw the necessity in learning about leadership and coaching, there was considerable debate about the amount of training needed in the actual instructional focus of the improvement project. For instance, inquiry education required training in how to develop inquiry projects, in the theoretical underpinnings of inquiry, and in how to help teachers understand the potential of an inquiry approach. However, as several of the instructional teacher leaders pointed out, expertise was not a requirement. As Charlotte related, no one teacher could know everything about the focus of their initiative, and no teacher should be expected to:

You know I don't think that I'm an expert in any of these areas, of literacy or numeracy, even though that was our initiative, and I try to read as much as possible as I can about these things. I think probably the most important part for me was to actually understand how I could coach, and how I could be a leader. Because being a coach doesn't mean that you have to know everything. You have to be somewhat familiar with these topics, but the biggest thing is being able to say, "You know, I'm not quite sure but this is what I'm going to find out." You know what I mean? So I think for me actually learning what a coach was, and how to be a good leader was more beneficial for me than the other stuff. (Charlotte)

In her response, Charlotte expressed views that were shared by other instructional teacher leaders. Charlotte believed, based on her own experiences, that it is best for an instructional teacher leader to acknowledge that they do not have all the answers. Instructional teacher leaders, according to Charlotte, are there to support the teachers they work with, not to tell them or direct them.

One group of instructional teacher leaders was quite expressive about what worked and what did not in their training. In their separate interviews, Will and Louisa each explained how they were "held back" at the beginning of the project; they were not allowed to go out to the schools and work with teachers until they had taken some training in Instructional Coaching, following a program developed by Knight (2009). There were articles to read, videos to watch, discussions to be had, and sometimes they participated in role playing. While both Will and Louisa appreciated Knight's approach, they said that much of what they saw in the videos seemed inauthentic and out-of-sync with what they read in the books. In particular, the videos showed instructional coaches working with

administrators in a managerial role over teachers. This portrayal seemed to be in direct conflict with what was being advocated in Knight's books which illustrated a more collaborative and collegial relationship. Nevertheless the coaching team forged on with training and developed possible scenarios and discussion openers that they hoped would be useful when starting conversations with prospective cooperating teachers. However, after the training period was over and the coaches were sent out to the schools Louisa and Will said that they received lukewarm responses and they soon found that many of their discussion starters came off as insincere or "flaky". For Will and Louisa, the doors to classrooms would not be opened until they established a respectful and open relationship with one or two teachers in each school who were willing to take a chance on them.

Will and Louisa's experience clearly illustrated, that while preliminary and ongoing training in pedagogy, curriculum and coaching was useful, instructional teacher leaders needed to continually adjust and clarify their understandings as they worked with teachers and students. Both Will and Louisa said that it was important to be open and honest, to listen rather than tell, and to find one or two teachers who were informal leaders in their school who would be willing to open their classroom and start on a working, collaborative relationship. These lessons in relationship building were not taught to Louisa and Will through the coaching videos or workbooks; they were learned on the job. And as the coaching relationships continued to develop, Louisa and Will constantly clarified their roles and expectations with the teachers while they negotiated shared goals and working roles.

Clarifying Purpose and Gaining Confidence

As the instructional teacher leaders began working with teachers and negotiating their roles and responsibilities, it ultimately helped them gain confidence, competence and conviction and it allowed them to clarify and refine their purpose as instructional leaders. With each successful adaptation or adjustment, the instructional teacher leader learned how to make further inroads with individual teachers and this, in turn strengthened their conviction about the project and their role in it.

In their interviews, both Elizabeth and Maria related experiences when as very young teachers they were expected to work with and give leadership to older colleagues. They talked about their insecurities and how daunting they found it to be assigned to work

with and support teachers much more experienced than they were. These early experiences forced Elizabeth and Maria to clarify what it might be to give instructional teacher leadership. Each teacher was only in her second year of teaching when administrators asked them to visit other teachers' classrooms to support instructional practices. Fortunately, both Maria and Elizabeth shared that the experiences were largely positive and they attributed this to the fact that their roles were well-defined, they had support and direction from the administration, and the teachers they worked with were supportive.

You know what? I had a lot of support from a lot of teachers who said "You know; you are really good at this and I like how you worked with this kid!", and it was that. Hearing it from the teachers who have been there forever say that to you, "Hey, you know you are doing a good job here!" That gives you the confidence to move on, to move forward, and to continue to do what you're doing. And it really helps to have a good mentor teacher when you first go in. (Maria)

These initial experiences with instructional leadership and the success that both Maria and Elizabeth had in working with their colleagues gave them the confidence they needed when they eventually assumed their roles as lead teacher. By that time, each teacher knew her colleagues well enough to know how they might be received, even though they were still learning the nuances of the instructional approaches they were expected to champion.

The fact both Elizabeth and Maria were scheduled to work in particular classrooms with clear expectations and colleagues they knew well made a significant difference to them, especially when compared to those instructional teacher leaders who had to beg their way into classrooms. In fact, the seven district level instructional coaches' initial experiences with instructional teacher leadership were markedly different from those of the three lead teachers in this study. When they assumed the role of lead teacher, Anne, Elizabeth and Maria continued to be looked upon by their colleagues as just another of the staff. The added responsibility did not significantly change the rest of the staff's perception, partly because the three teachers were continuing to teach for the bulk of their day. In contrast, the seven coaches were seen very differently; perhaps in part because they were no longer responsible for certain courses or groups of students. In the following two quotes

Louisa explains the difference she felt when she moved from a lead teacher role to an instructional coaching role:

As a lead teacher I'm an employee in the school with people that I know. And I have relationships with people and they know who I am and they know that I'm not there to fix anyone. And I'm just there to talk about assessment at the staff meeting, and they can take it or leave it. So, with the lead teacher thing, the biggest thing for me - the biggest challenge for me - was with my own personal confidence. Do I really have something to share with these people? You know, a lot of people on staff were more experienced than I was. (Louisa)

And it was different as an instructional coach. In fact, I almost didn't continue after the first year. I was very close to going back to the school because of the "people factor", the perception of it. You know - I'm not a teacher in the school, but I happen to be doing this lead teacher thing and now it is Louisa is some kind of instructional coach, and we don't really know what that means but she has this title. She works in central office. And now I felt even further removed from the process. So it's not just me in the school working with another teacher to hopefully improve instruction, now it is Louisa from central office; like it was a big step. (Louisa)

Louisa's early experiences and feelings as an instructional coach were not anomalies; there was uncertainty and a great deal of negotiation that had to take place for most of the instructional coaches. Every interaction prompted further introspection as instructional teacher leaders sought to clarify their mandates, roles and expectations in response to each situation. Each of the district instructional coaches was expected to go into at least one new school and, without knowing the staff or the context, advocate for instructional reform. As Mary would attest, it was a daunting task—even when coaches returned to work in schools they had just recently moved from:

It was an uncomfortable situation. I was friendly with the new staff of the junior high and I was still close to some of the elementary as if I were a colleague but now I was no longer a colleague. I mean I was, but not a shoulder-to-shoulder day-to-day staff member. So I came in there not really knowing my position, my role. And who is going to accept me? (Mary)

Instructional coaches at the district level were challenged to build relationships with people they had never worked with and work in subject areas and grade levels where they had little experience. In addition, some instructional coaches like Louisa and Charlotte were quite young in comparison to the teachers that they were working with. Coupled with this challenge to show credibility was the communication piece. Even if an instructional

coach were well-versed in the improvement goals and strategies and even if they had significant training in relationship building and coaching, there was no guarantee the schools and teachers in those schools understood what was going on or would be receptive to having a coach come in and work with them.

When I asked the instructional coaches what might help beginning instructional teacher leaders gain confidence and provide clarity as they started working in schools and with teachers, they offered a few suggestions. Catherine said that it was important to make sure the administrative team has the same understanding of the project that you do and that this has been well communicated to the rest of the staff. Louisa and Will suggested sending a series of emails prior to visiting a school and making a “happy visit” to the school prior to your first official visit. Maria said that it is best to start by listening and trying to learn as much as you can about each teacher and the school environment in which they work. And Charlotte said that beginning instructional teacher leaders should seek out like-minded people; teachers who are open and willing to take challenges.

Clarifying Responsibilities and Obligations

As many of the instructional teacher leaders intimated, one of the most important aspects in clarifying an identity as an instructional teacher leader was constantly clarifying their responsibilities and obligations with respect to the improvement project. As the interview data revealed, this clarification process is really made up of three components:

1. Being clear about who you are serving.
2. Being clear about how you are going to go about the work.
3. Making sure that all parties involved understand what your primary role is.

Who were you serving?

The ten instructional teacher leaders interviewed were often placed in challenging circumstances; they were expected to champion reforms at the behest of many different stakeholders (school, district and province) and collect evidence that what they were doing had a measurable effect upon student engagement and achievement. At the same time, they were committed and caring educators and were cognizant that they were not working with

machines. So I asked the question, “Just who, precisely, were you serving as you fulfilled your role as an instructional teacher leader?”

As expected, most instructional teacher leaders said they were serving the students first, their teachers second, and then the school administrators, district officials, and provincial authorities, and in that order. These instructional leaders said they were most committed to making a difference for students, and this goal clearly aligned with the overall goals of AISI. The focus of AISI was to be on school improvement through student engagement and achievement. However, most instructional teacher leaders acknowledged that the bulk of their work did not involve students directly but was primarily conducted with teachers. Mary, Jane, and Louisa all tried to explain just how the students remained the focus even when they were working with teachers:

Always the kids were the most important stakeholders for me; always the students. But we were affecting the students’ lives through affecting the teachers. So we’re working with the teachers. Well I did eventually work with a lot of the kids, because the situations that we eventually found ourselves in, but they (the students) were always the focus anyways. So our conversations were always, “This is what I’ve noticed in the students’ behaviour, in the classroom, and let’s have a discussion on that. What was good about that? What needs to be tweaked?” What kinds of observations and thoughts did the teacher have on what was happening with the kids? (Mary)

I think my major responsibility was towards the students because that was my major obstacle in the decision to leave the classroom. I felt there was measurable impact that I was having in the classroom, and I didn’t know if I wanted to step away from having those successes. But through conversations with my directors they convinced me that you can multiply your impact by influencing practice of the teachers around you. (Jane)

How are you expected to perform this service?

As several instructional teacher leaders made clear, keeping the focus squarely on students and their growth helped teachers and instructional teacher leaders steer clear of the worry of professional evaluation. Mary said that she was never in a classroom to observe the teacher and critique practices; instead she was there to observe how various approaches impacted individual students and groups of students. After each lesson, she and her cooperating teachers would share and compare their impressions and decide upon next steps. Elizabeth took a slightly different approach; she would collect artifacts (student work, recordings, assessments, etc.) and discuss these one-on-one with the teacher. She

said that her focus was always squarely upon what could be done to improve student learning.

These two approaches, observing students as they worked and examining artifacts, were just two of the many different ways instructional teacher leaders worked with teachers. The instructional coaches and lead teachers in this study each developed a repertoire of approaches in their efforts to work with teachers. While the nature and variety of instructional leadership roles is explored much further in the next chapter on the process of engaging, it is important to stress that all of the instructional teacher leaders saw their primary role as one of service and collaboration. In their interviews they asserted that they were not comfortable with dictating or directing. Instead the ten instructional teacher leaders volunteered that they saw themselves more as lead learners, co-planners, and classroom coaches rather than as consultants or supervisors (which they saw as less collegial and less collaborative).

So the instructional teacher leaders saw themselves primarily in a service role and for the most part, this was the mandate they were given by their supervisors and directors. However, how the instructional teacher leaders and their supervisors envisioned the role was often very different from how school administrators and teachers perceived it and this incongruence necessitated a great deal of clarification.

Do all parties involved understand what your primary role is?

Most of the instructional teacher leaders in this study shared that their role, as outlined in their initial AISI proposals, had been ambiguous or overly ambitious. They pointed out that, how an AISI project was conceived was often quite different from how it was eventually carried out. Four instructional teacher leaders noted that their directors expected them to work with teachers in the classroom side-by-side for close to 80% of their time. These directors and the instructional teacher leaders themselves did not realize how challenging it would be to build relationships and create the kind of trust needed to facilitate that kind of working model.

And our big consideration, when we started this project, was that all of the literature was saying that most learning coaches only seem to end up with 20% of time in the classroom with the teachers. And our director's goal was 80%. We wanted to flip this. So

he set the bar really high, with the idea that it is what it is, and we will just find out what is. And I didn't feel like I was in the classroom as much as I wanted to be. But after analyzing it, I think it was in the classroom more than I thought it was. It worked out to - with my partner teachers and with facilitating PD - it worked out to 40% of my time. (Jane)

As such, instructional teacher leaders had to define and refine their roles from the outset of the project and they did this by considering the needs of the project, the nature of the school, the personality of the teachers they worked with, and the amount support that they might receive from the administrative teams. This clarification process sometimes took months and continued throughout the project's duration.

I have been struggling with that. I have been asking for more defined role, I want to know where those parameters are for my role. If you look at each of the coaches, their role in their schools looks very different from each other. And so for me to actually give a definition to that role is challenging. I went over in my mind all the different roles that I play or try to fill and it is everything from collecting data, to helping people plan, to just being a catalyst for change and modeling. And facilitating a small group PD for principals when they don't have the instructional capacity in a particular area but they know that their staff needs it. There are just so many different facets. (Jane)

As instructional teacher leaders sharpened their own understandings of the projects' goals and their roles within these projects and as they deepened their work with teachers, the nature of their work changed. For many instructional coaches, the change started with friendly professional conversations and then moved into collaborative planning sessions. Once cooperating teachers were comfortable that the instructional teacher leader was not there to judge or "fix" them, opportunities arose for instructional coaches and the teachers to visit classrooms, demonstrate strategies, observe their colleagues in action, and ultimately establish the kind of side-by-side coaching role originally envisioned by the project and the directors who had made this project.

I found the best things to ask were, "How is it going today?", or "What's it like in your classroom?" And I found the casual personal conversations worked, I think that's why I got as far as I did with a lot of the teachers that I worked with. Because I took the time to hang out for a few minutes, and have a cup of coffee and chat for a few minutes before we got down to work - but not in any artificial way. But only because I wanted to know what was going on with you. (Louisa)

So, in each of the districts included in this study, the role of instructional teacher leader gradually emerged as each of the lead teachers and instructional teacher leaders

worked with the teachers. The role was envisioned by the project plan and by the AISI coordinator and other district personnel, but what it eventually looked like was dependent upon a multitude of factors including: each teacher's needs, the culture and circumstances found in each school, and the understanding and adaptability of the instructional teacher leader. Ultimately getting all of the stakeholders to have a shared understanding of the various project roles depended on how well the instructional teacher leader would be able to clarify these roles.

Summary

This chapter focused on Clarifying, the first of the four adaptive processes suggested by the interview transcripts from the ten instructional teacher leaders. In their interviews the ten teachers revealed that a significant amount of their time and energy as an instructional teacher leader was concentrated on considering the role and its possible requirements, acknowledging and acting upon their personal and professional aspirations and motivations, learning about the expectations about the role from literature and supervisors, coming to an understanding about their responsibilities with the teachers and students they worked with and then, continuing to make adjustments to the ways they worked as they constantly learned what worked and what did not.

The next chapter focuses on Engaging. In it I will discuss what the transcripts revealed about the ways that the instructional teacher leaders secured support from the principals and other leadership, established productive relationships with classroom teachers and embarked upon school improvement work. In this adaptive process of engaging, the ten instructional teacher leaders were further challenged to negotiate their roles and responsibilities; often making deals with their teachers in order to establish practices and routines that would allow for collaboration and inquiry.

Chapter 6: Engaging

Working with teachers and their students on school improvement

Chapter Five, Clarifying, focused on how the instructional teacher leaders adjusted to their roles; it dealt with the first of the four adaptive processes the teacher leaders experienced. The interviews revealed that taking on the role of instructional teacher leader and forging a new identity was an individualized process and required regular introspection and reflection as teacher leaders gauged their own motivations, passions, and commitments to adjust to a new set of circumstances. The second adaptive process, Engaging, is concerned more with how leaders approached their work. Engaging the faculty challenged instructional teacher leaders to work strategically: securing administrative support, making connections with teachers, encouraging informal leaders, negotiating roles, and focusing on purposeful work. Each of these actions forced teacher leaders to develop adaptive and reflective capacities. Chapter Six uses examples, anecdotes, and direct quotes from the teacher leader interviews to show how instructional teacher leaders approached their work; how they established relationships and the improvement focus while adapting to individual and collective contexts. The process of engaging as it pertains to the experiences of these ten instructional teacher leaders was influenced by how each went about:

- Engaging the Principal and Administrative Team
- Engaging Interested Teachers
- Getting Started on School Improvement
- Considering Roles and Responsibilities
- Negotiating Roles; Being Responsive
- Collaborating and Engaging in Reform

This chapter will examine each of these six sub-processes in that order.

Engaging the Principal and Administrative Team

It really depended on the building, but a lot of it [the work] was just making sure that I was on the right track for the school and staying true to where the school was going, and making sure that the admin were as up-to-date as possible on the research and the things that I was putting out into the classrooms because we needed to put forth a

united message. So if I went into a staff meeting, or into a classroom, and started talking about this person's work or that person's work, or why we should do this or that, and then administration contradicted me - that would be a problem. (Elizabeth)

According to the teacher leaders interviewed, it was vitally important that principals and assistant principals understood the goals of the improvement projects and their role in supporting the work of the instructional teacher leaders. Unfortunately, such understanding was not always the case; several instructional teacher leaders pointed to lack of support from principals as being a major concern in getting and keeping the project going. Catherine and Elizabeth related examples of principals who had an incomplete or inaccurate understanding of the project, its goals and associated strategies. Louisa, Mary and Charlotte described principals who expected the instructional teacher leaders to help them in dealing with incompetent teachers:

He came to me and said "Louisa, this is what's happening, this teacher is doing this. Can you somehow finesse your way into their classroom and work on them on this part?" And it was a real conflict for me because I didn't feel that was my role, I wasn't really there to prescribe or fix anyone. I didn't want to be "the fixer". I didn't want people to perceive me as the person who came in to see you when the principal thought that there was a problem in your classroom. (Louisa)

Will gave a vivid account of a principal who was just as skeptical and dismissive as some of the most resistant teachers on his staff:

So I happened to mention it to the principal who was in the coffee line up that I would be coming his way and I was assigned to his school. That I was going to send out an email to his staff and let them know what services I could provide, and he just replied, good luck with that. That was his response; sour, frowning. And then he just turned around and walked away. (Will)

Maria and Charlotte said that they met with principals who were jealous of the funds being spent on instructional teacher leaders that might be spent on staffing or resources. Moreover, almost all of the instructional teacher leaders mentioned the fact that many principals compelled rather than invited teachers to work with an instructional teacher leader.

We booked four subs and we came to the building, and in this particular instance and in working with this administrator, it became a case of being voluntold. The principal just signed people up. There was a little bit of resistance, although most people were quite

polite. But most of those ended up being “one-offs”. We didn’t get the buy-in; we didn’t get the repeat visits out of it. (Will)

According to Charlotte (and several other instructional teacher leaders), many principals did not always understand their role with respect to the AISI project and with respect to supporting the instructional teacher leader. What complicated this circumstance even more was the fact that Charlotte and the rest of her district’s team of instructional coaches were also charged with a second role; that of guiding and supporting teachers as the district implemented a new literacy assessment benchmarking system. So, on the one hand, Charlotte and the other instructional coaches were expected to be collaborative and collegial and, on the other hand, they were expected to be directive and to promote accountability.

Mary, in particular, related an anecdote about a principal who was supportive but really did not understand what his role was. He chose teachers to work with the instructional coach, because he thought that there were significant issues to address. When Mary began to work with these teachers, she told them she was there to work with them but she was not in an evaluative role. However, the principal continually asked Mary for feedback about how it was going with these teachers, which put Mary in an awkward spot. Mary said she had to be careful to respect the teachers’ privacy and not betray their trust. In her words, “she would not be a spy”. Mary said that this coaching role was difficult for the principal to understand; he cared about the teachers and wanted them to be successful and he thought that the instructional coach was there to support him as he pushed these teachers to become more effective.

And he trusted that when I was in the building, I was doing something constructive and I was doing what I was meant to be doing. So in that way he was very supportive. But he really didn’t understand what I was there for. He really didn’t. (Mary)

However, although the instructional teacher leaders could readily give examples of circumstances when they did not feel supported or understood by certain principals, they could also relate instances when they felt empowered by other principals who took the time to listen to, work with, and invest in lead teachers and coaches.

I would say that there are some administrators, in general, who acted more as champions of coaching than others. Some would say “Here is Louisa and she’s going to talk to you and then they would walk away.” They made time for me, which was great, I never really had to fight for any time, but they weren’t really vocal champions. Whereas I had one administrator in the school I worked with for four years who was very much supportive of the work and excited, and if teachers chose to share with them what they were doing he would be very great cheerleader for us. And he would give us positive feedback. So that was great, it really made a difference. (Louisa)

The interviews revealed that principals and their administrative team greatly influenced the experience of the instructional teacher leaders. As such it was very important for lead teachers and instructional coaches to engage principals by providing clarity and encouraging commitment. How well they were able to do this depended greatly upon their individual contexts, and how receptive the principals were to collaborating and problem-solving with the instructional teacher leaders.

The best example of a principal who understood his role and helped champion the project came from Elizabeth, who described her first principal as a risk-taker who empowered his staff and led by example. She jokingly said that her first principal “ruined her” for all the principals that would follow:

My first principal took us into deep, deep, learning; where teachers felt safe to try things and where there is action research going on; we were action researchers before action research was really even a term commonly used by teachers. (Elizabeth)

Cognizant of the importance of having the support of the administrative team, the three lead teachers in this study all made sure that their principals had a good understanding of what lead teachers were to be doing. Anne, Elizabeth, and Maria acknowledged that they were not afraid to be outspoken in their advocacy for the project. In Anne’s case, she sowed the seeds for her action research plan long before the school year started and, when her new principal arrived in August, it was easy for her to get the staff to get this new administrator to “buy-in”:

And so we had a consultant come in last year before the school year even started, and she did an in-service, just to let people see the possibilities and then I waited. And then, in September, when we were talking about what was a reality for our department goals, and what we could do for how to get better in our department project, I said: “Well we could do this. Remember the stuff that we had had last year?”, and so then, people were rested, and maybe they were ready to think about doing something differently,

and they already had their interest piqued a little bit, in mid-June. And we also had a new principal who was just starting in September, who wanted to climb the ladder, and wanted to look good. And so when I said: “How would it be if the English department would do this?” And he was all over it. And so we got all the support that we needed. He jumped up and said: “Okay, you are our AISI project!” (Anne)

As the project unfolded, Anne continued to advocate for her team and the project; she met with the leadership for the school and district; she brought in district support and outside consultants; and she continually pestered administration for time, resources, and other kinds of support.

As a district-based instructional coach, Charlotte saw the range of leadership styles and support that might be experienced throughout a large district. She said she witnessed firsthand different leadership styles with the two schools that she was assigned to and that she also heard about it second hand from the rest of the instructional coaching team she was part of. Charlotte said that instructional coaches often ran into administrators who were simply too busy to try and understand what it was that the instructional coach was supposed to be doing in their school and how they were to support them. According to Charlotte and several others, these principals came to see the instructional coaches as little more than a nuisance; the coaches would descend upon the school, work with one or two teachers and then leave and everybody in the building could relax again. The instructional coaches said that, when faced with busy, disinterested or skeptical principals, the instructional coach needed to do a great deal of clarifying and relationship-building before they could make any significant strides in changing the culture of the building.

Sometimes I look at schools, and I think “I would not want to be a coach there! They are not ready for that!” Why? I really feel like it depends on whom the administrator is, and who is rolling this out. I feel it plays a huge part in it. So that administrator’s support is the biggest single factor. I mean between the two schools I was working with, it was easy to see who made this a priority. Initially, when I walked into it I thought that I could change a school all on my own, but now I realize that you need all that support. It’s not all on my shoulders; there are a lot of other things going on in the building. You are one person in a complex situation. (Charlotte)

Of all the instructional teacher leaders in this study, perhaps Will summed it up best (and most succinctly) when it came to describing why it was so important to engage principals in the school improvement work that the coaches and lead teachers were championing:

What's interesting, I can tell you, is implicitly where the principal goes—the staff will follow. What the principal values, the staff values. (Will)

Engaging Teachers

I felt like I wanted to serve the students through the teachers, if that makes sense. (Louisa)

Louisa and the other instructional teacher leaders attested that the majority of their work was done with and for teachers. These instructional teacher leaders hoped to improve student engagement and achievement by challenging their colleagues to try new strategies, to consider current research, and to reflect upon and refine their own practices. So, for the instructional teacher leaders, it was vitally important to make a good first impression upon the teachers they hoped to work with. For these instructional teacher leaders, their challenge was threefold: 1) to make a connection and start a discussion about professional learning, 2) to clarify and reaffirm the goals of the project, and 3) to establish a relationship based upon professional inquiry, respect, and trust.

How instructional coaches made initial connections with teachers.

The three different groups of instructional teacher leaders in this study illustrated three different ways in which instructional teacher leaders might begin to make a connection with the teachers. For Louisa, Will, and Catherine (instructional coaches assigned to many schools), making a connection involved informal conversations, emails, visits, and highly public discussions. Due to the nature of their district's invitational model, these three coaches could only ask teachers to partake in professional inquiry, offer their services and hopefully move to one-on-one coaching situations. Louisa, Will and Catherine said that, at the beginning of the project, this meant spending whole days in staff rooms; working behind a computer and hoping that someone would take an interest in what they were doing.

It wasn't until probably three quarters of the way through the first year, where we really started to develop the relationships. But I can tell you what didn't work; it was setting out and telling people "Well I'm part of this project!" and then sitting in the staff room

for two days to just say hi to people. And hoping vainly that they would want to come and work with you on their spare, because that's all they were to be given. (Will)

Louisa, Will and Catherine sent emails to the school staff to let them know they would be coming, but, as they acknowledged, teachers get many emails in a day and not every email is read. In fact, all three coaches related instances of being approached by teachers who were confused as to why the coaches were at their school. Louisa said she was frequently asked if she was a substitute teacher or a student teacher.

Complicating school improvement work for the coaches working with an invitational model was the fact that teachers did not have much time to spend with instructional coaches, even if these teachers were interested in what the coaches were doing. A quick conversation at recess or while a teacher refilled a coffee cup was not enough to affect any kind of meaningful change. Moreover, as Will pointed out, teachers who did have a spare period in their schedule usually had things planned for that extra time long before the instructional coaches showed up at the building. After spending several weeks visiting schools and getting very little response, Will, Louisa and the rest of the coaching team asked their director if they might be able to take along a substitute teacher when they visited the schools so that teachers would be freed to work with instructional coach while their classrooms were being covered by a teacher. In addition, Will, Louisa and Catherine said that they made sure to regularly communicate with any teacher on staff willing to engage in such professional discussion (collaborative planning, analysis of artifacts) so that they could plan on using the substitute provided. According to these instructional teacher leaders, both of these adjustments had a direct and positive influence on their school improvement work.

For the other group of instructional coaches who were assigned to two schools and only four teachers (Charlotte, Caroline, Mary, and Jane), making initial connections was easier. The model their district had implemented ensured that some planning conversations would happen.

I had four partner teachers that I was working with this year and they were all fantastic; I was very fortunate in that. Originally, the people that I worked with were to be volunteers. So in my home school I had two very willing volunteers, having been colleagues. (Caroline)

Volunteer teachers were appointed to work with instructional coaches and the four coaches in this study all made efforts to meet with these teachers before the school year actually began. The coaches said that they emailed and scheduled one-on-one meetings with their teachers to discuss what the project was about and how they might go about doing the work on the project. In several cases, coaches were matched with volunteers who had taken some or all the instructional coaching training that had been offered in the district the year before. According to Charlotte, Caroline, Mary, and Jane the common training and understanding made it easy to establish norms and understandings about what was going to happen.

And then in October, the grade one teacher who also trained with me, she also signed on to be a partner teacher. She was very much more open to what we were doing, because she was being trained with us. She knew exactly what she was signing up for. And we had those “harder” discussions often. (Mary)

Unfortunately, many partner teachers were not volunteers and were directed to work with the coaches.

So where we had been assigned to work with partner teachers, where people were “voluntold”, it was challenging. (Caroline)

As such, the coaches said that several of the initial few visits required a great deal of tact and sensitivity on the part of the coaches. Charlotte shared one example where the teacher she was to work with was flustered and frustrated by the whole situation. This teacher kept asking: “Why?”

Like I said, we had a good relationship, but he was so unclear as to why was working with him. And I was trying to build him up, and I said “It is because you are strong teacher that I am working with you.” I didn’t want to lie, because I see every teacher having strengths, and I learned so much about technology from this teacher, it was unbelievable. But I mean he knew too that there were some issues. And so he had his back up to some degree, and I think he just wanted to make himself look better because he was just feeling so insecure. And it wasn’t really a bad situation; it just wasn’t the way it was supposed to be. (Charlotte)

For Charlotte, it took some time to get this particular teacher past defensiveness and onto meaningful professional collaboration.

How lead teachers made initial connections with teachers.

Anne, Maria, and Elizabeth (site-based, part-time lead teachers) did not have to go through a “getting to know you” stage. Although there were teachers who may have been recent hires to their particular schools, all three lead teachers said that they knew the staff quite well before they needed to start working with individual teachers. Anne said that she already had a close working relationship with her colleagues; she had been the department head of English in her school for several years and she felt that her colleagues respected her. Anne said that she was also careful not to overstep: the kind of work she did with her staff was limited to professional collaboration at staff meetings, department meetings, professional development days, and between classes. Anne said that she was not about to go into her colleagues’ classrooms and critique; her leadership would take a less direct route.

That was presented as an option and everyone here (the English department) didn’t like that plan and I didn’t want to be overbearing. And I wouldn’t like it if someone came into my classroom to watch me either. So I was fine with not doing that. (Anne)

When I asked Anne to elaborate further on why she chose to lead without doing any classroom coaching she explained:

I think high school teachers in general - are very worried about judgmental people, and so I don’t want that. I was okay with not doing that, because I just wanted them to do the project and not quit, and at least try it. So whatever I could do to facilitate the project happening, or make it easier or less threatening for the people who were a little nervous about it, then I didn’t want the “Well, I have to come in!”, because that would change everything. (Anne)

In her interviews, Maria said that she was also very familiar with her staff and felt supported by her principal for the first two years of the project. Maria and another grade five teacher had been working together for a number of years and, at the beginning of the AISI project on critical thinking, the two of them started piloting some of the approaches. On staff meeting days, Maria and her colleague would demonstrate critical thinking by conducting mini-lessons for the staff.

On our staff days or on professional development days when I had my hour, I would always demonstrate lessons. I would try and compact four lessons into that hour, and I would have teachers be the role of the student, and I would do the actual activities with

the teachers at that time, and then I would invite them for feedback for how they could see themselves using this with their students, or not using it with their students. (Maria)

Maria said that through these demonstrations and her persistent reminders, most staff members eventually tried to incorporate inquiry approaches into their regular classroom work and many had passed on artifacts (lesson plans, recordings, student work) to show this. According to Maria, only a few teachers did not give it a try.

Elizabeth said that not only was she familiar with the rest of the staff, she was also very familiar with the school community. She shared several anecdotes where this familiarity became an issue because it was difficult to separate her roles as teacher, parent, and member of the community. Elizabeth said that there were instances when she felt she had to challenge certain teachers using ineffective practices or not addressing important issues in their classroom and this resulted in tension amongst the staff and internal conflict for Elizabeth. She related one particularly challenging instance:

So I think that the letting go—because I have no authority, and they are not going to do anything about it—that is hard. And in one sense I am thankful they (the admin) are not embarrassing him, they are not pushing him out the door in a very cruel and inhumane manner. At the same time, I question who is suffering just because we are trying to be nice to this person. What about the kids? (Elizabeth)

However, Elizabeth said that she also found ways to use her personal connections and familiarity to open up professional dialogue. Elizabeth said that her first-hand knowledge of the students and staff made her a very knowledgeable advocate for student engagement.

The importance of making a good connection.

The ten instructional teacher leaders shared many examples of how they started building relationships at each of the schools they were assigned to. Charlotte said this process often involved making personal connections with teachers and their shared experiences. Hobby farming, Pinterest, training dogs and horses, and many other topics were Charlotte's places to start.

I spent a lot of time, in the staff room with these teachers, just trying to find some common ground. Some of them, their kids rode horses, some of them they like football, and in Australia we like to talk, well you know I do, I don't want to stereotype us all, but I love to talk, I love to communicate, I love to make jokes. (Charlotte)

Other instructional teacher leaders shared instances where they used common interests (hockey, hunting, crafts or hobbies) to create an initial bond with the teacher before they moved into a discussion on the school improvement focus. However, some of the instructional teacher leaders felt that such “schmoozing” was inauthentic and they preferred to start on a more professional note.

Knowing how important it was to get off on the right foot with teachers, Will and Louisa explained how their team had formulated all sorts of discussion starters prior to going out and actually working in the schools. Will said that some of these discussion starters were helpful but most of them simply never found an appropriate context:

I realized what it took to start that relationship process. And it wasn't with my pre-prepared list of interview questions, “How long have you been teaching?”, and “Tell me about a favorite year?” and “In your mind's memories favorite scrapbook what was your most important event?” Yes, that was one of our questions! (laughing) I don't know where that one came from, but it was on our list. And thank God, I put the stupid questions aside and I just said, “Well, tell me what you working on? What do you want to do?” And it was very, very, little of: “Tell me about your philosophy.” Very little of that. Mostly it was: “What you working on and where can I help you?” (Will)

Will said that it was much more effective to explain the project in comparison to earlier projects and in light of the other initiatives that Alberta Education was advancing at the time. He said that many teachers in his school district were suffering from “initiative fatigue”; with AISI's three-year cycle of projects, the teachers have seen four cycles of strategies and some had become skeptical and disenchanted. Will said that he needed to start conversations with these teachers and explain how the current project related to earlier projects to gain interest and convince reluctant teachers to become part of the improvement process. In other words, before he could get on with engaging, Will had to do more clarifying.

Getting Started on School Improvement

The impact of finding a willing teacher.

So you have to find that one keener-beaner who is willing to sit down with you and plan, even just a little nugget; it doesn't have to be a big piece - it can be one lesson that you plan together. And let's give it a try together. And then, all of a sudden, you have

something to talk about and so do they. And then you have a reason to come back, a reason to try that again or to try something different. And hopefully the word is spread. And it does, in fact we have had a lot of people come on board with coaching just because they heard from a colleague that it worked. “Oh I heard what you are doing with so-and-so and that sounds really interesting, could we meet?” But we just really need is that keener, that informal teacher leader. But if you don’t find this person, it’s gonna be a waste your time. (Louisa)

Like Louisa, most instructional teacher leaders said that it is vitally important to find one or more willing participants who were ready and able to give you their time for you to get the ball rolling in their school. The instructional teacher leaders referred to these people as “pioneers”, “kindred spirits”, “first adopters”, “risk-takers”, “keener-beaners”, and even “guinea pigs”. No matter what these people were called, their descriptions brought to mind certain characteristics: they were growth-minded, they were secure in who they were as teachers, they often sought out the instructional teacher leaders, and they were ready to take a few risks.

One such risk taker was Betty, a grade two teacher who Caroline described as “willing to put herself out there”. Caroline explained:

And I remember saying that we were going to have a meeting with the learning coaches at the beginning of October and that we would like to demonstrate a coaching cycle via video of how this could look at a classroom. This demonstration would include a preconference, a side-by-side coaching arrangement, and a post conference wrap-up. And I asked if she [Betty] would be willing to do this [coaching cycle] on video. And if we could we show it at the meeting next week. And that was asking a lot of somebody! And she said, “Well, you know, I am working out of my comfort zone, but this year is all about me taking risks, so I am in!” (Caroline)

Caroline said that her experience with Betty was even more remarkable because this experience happened early in the coaching relationship. According to Caroline, the AISI project just started that September and asking any teacher to be videotaped for discussion and debate by a group of learning coaches and cooperating teachers was unthinkable. Yet, Betty stepped in. Caroline went on to explain that the process was fast (it happened over the course of several days) but productive:

And then we took the recording to the coaches at the coaches meeting the next day. So that was a late night of editing, and we showed our recording to the other coaches and their cooperating teachers in the division and they got to hear Betty speak about her experience. And the comments that came out of that sharing for her of: “It is so nice to

see this happening with somebody from our division!” and, “It’s great that it’s not a prescribed PD video; that must have been an amazing risk for you to take!” And these comments really made her feel like it was worth it, to have taken the risk. And it was a huge risk she took. And I would not have asked any of the other three that I worked with to take on that kind of risk, especially so early in the process. (Caroline)

Caroline said that, for herself and for Betty, the videotaping episode established a lasting and effective working relationship.

But really, this was our first official coach/cooperating teacher interaction. And it was huge. It was absolutely huge. And I attribute that as a positive experience for her; to the growth that she’s experienced over the course of this year. (Caroline)

While Caroline’s example of Betty was certainly one of the most memorable, several others stories also showed how important it was to find someone to connect with and take shared risks with. In one anecdote, Will explained how a teacher made him feel welcomed, comfortable, and did her best to get him started on the work he was charged with:

And there were lots of early pieces that were strong but I remember one teacher, she was out in this school I was working at, and she was a seasoned teacher, we had called them “lead teachers” in the previous AISI cycle. So in her building, she was the AISI lead. So she might have known that I was coming down the pipe, or what was going on. But I remember her coming in and saying “Who are you?” in the middle of the staff room.

And I said, “I’m the new instructional coach for AISI.”

And she said “Oh so what you do? You know I have a prep in block three; how about we talk then?” So she gave up her prep to sit with me. To sit with me and plan and she said: “Well let’s get going on this.” And we got to know each other through the planning.

Will gave credit to this teacher for kick-starting his work as instructional teacher leader. He said that he had been sending out emails and waiting in staff rooms, hoping someone like this might come along.

In Will’s case, the teacher sought him out; Catherine related a similar experience when she was working on her master’s degree in education and, at the same time, taking on an instructional leadership role. For her capping project, Catherine needed a classroom teacher to work with so she could develop various assessments and a reporting system for Kindergarten. One teacher she was working with in her district said that she would be interested in working with Catherine and be her “guinea pig”. As Catherine put it, this

teacher's participation was "huge" and "monumental". Catherine said that this teacher helped to redesign the Kindergarten reporting system and worked on comment writing. She also said that the results of their collaborative work were very satisfying; parents expressed an appreciation for the clarity of feedback they received.

The challenge in finding willing teachers.

Finding willing teachers and making the connection was easiest for the three lead teachers in this study. They had a sense of who might or might not be willing to take a few risks because they had been colleagues with these teachers for a number of years already. As Elizabeth and Maria pointed out, the issue for lead teachers was not in finding willing participants but in being able to ignore, for the moment anyways, teachers they knew were stuck in their ways. In one of her interviews, Maria said that she thought there would be naysayers in almost every building and that the worst thing you can do is waste time and energy trying to reach and convince these people.

For the seven leaders who were instructional coaches, making the connection with influential and innovative teachers was more challenging. In the one school district where coaches were matched with four teachers each, the matches were not always effective. Each of the coaches talked about the amount of time invested in establishing the kind of trust Caroline and Betty had almost immediately. When asked to reflect about how they cultivated relationships to promote risk-taking and early adoption, the instructional coaches related a variety of strategies. Will said that it was about extending simple kindnesses to teachers; respecting their time, validating their work, taking along coffee and donuts, following-up promptly, providing them with quality materials, and being honest enough to say that you do not know. Louisa said that she had the best success when she started her work by finding out the concerns of the teachers she was coaching—she did not feel it was effective to come in with a pre-determined agenda. Louisa said that coaches should always have two or three resources ready at hand, but they should let the teacher steer the direction of the first few visits.

Like Louisa, Charlotte maintained that she was never coming into schools to be "the expert"; she had some expertise but recognized that teachers also had a great deal of expertise. In particular, Charlotte mentioned one teacher she worked with who had more

knowledge about technology than she did; acknowledging his strengths was an important part of securing his trust and getting him to try new strategies.

Catherine said that finding willing teachers had much to do with faith; were there teachers out there who would put their faith in you? And, when they did, were you willing to put your faith in them? The anecdotes shared by Catherine and the other instructional coaches contained many instances where instructional teacher leaders encountered teachers making a tentative step towards coaching support only to shy away later in the process when they were given what they felt was judgmental feedback. The coaches said that when instructional teacher leaders used phrases like “best practice” and “research says”, when they used educational jargon or made too many references, it was off-putting. This was one trap Elizabeth acknowledged she easily fell into. Elizabeth said that she was so excited that she sometimes overwhelmed the teachers and made them feel insecure. Elizabeth said that she dealt with nervous or overwhelmed teachers by acknowledging to them that she was a “research junkie” and she said she tried to validate what teachers were already doing by connecting their work to current research. According to Elizabeth, an effective, working relationship had to be built upon: honest and open dialogue; artifacts and evidence; and regular, clear feedback delivered early in the coaching cycle.

Being an advocate for the teacher.

Above all, said Caroline, instructional teacher leaders need to be supportive. Caroline explained how she had secured trust and cooperation of one teacher by championing this teacher’s efforts to enter students into a regional science fair. Caroline said that the teacher was apprehensive about putting her students forward and she did not think she would secure permission from administration. Caroline encouraged the teacher and advocated for her and her students. Caroline said that her reassurance and validation was an important first step in building a coaching relationship:

And she took a student to the science regional science fair, and that student made the national science fair and so I’m drawing on that. I’m trying to reinforce the fact that that couldn’t have happened without her. I mean, yes - this student was going to be successful, she was very bright, but she needed that support and a teacher was willing to provide that. And this is something from “outside the box”, it was different, and it took some risk taking. And I look at some of the things that this science teacher is

implementing for review, with her classes in preparation for exams now and we are now coming back to some of the “outside of the box” thinking, focusing on student engagement, focusing on some of the things that she wanted to try earlier in the year. So I think we can encourage teachers to draw on those positives. (Caroline)

Mary said that being supportive meant respecting the fact that some teachers were not ready to work in public places and did not want to share the coaching conversations with other teachers in their staff—at least not right away. Louisa echoed Caroline’s insight and said that instructional teacher leaders needed to be patient at the outset of their school improvement assignments. She said that teachers needed time to understand their roles and how the strategies and research might impact their classrooms. Louisa said that instructional teacher leaders needed to be respectful—and to give the teachers space and time. According to Louisa, extending small kindnesses, providing resources and timely suggestions, and validating and valuing the work teachers already do in their classrooms are all good strategies for investing in transformative teachers, but the biggest single thing you can do, is give them space:

It’s all about relationships. And that comes from empathy, and that comes from listening, and it comes from sitting across from the person and just reading them for that particular day. Because I have some people that I worked with for four years, and I know about their personal lives and they know about mine and we have a friendly relationship, but then that one day is an off day. And we all have them. (Louisa)

Building equity and trust through service and kindness.

As important as it was to identify and enlist early adopters in the improvement process, it was equally important to cultivate professional and effective relationships with each teacher that these instructional teacher leaders worked with. This cultivation was largely achieved through service— something many of the instructional teacher leaders called equity building. Equity building started with many small kindnesses that Will and Louisa talked about. The instructional teacher leaders said that it was important to let people know that you were coming to the school, to be respectful of their time, to be honest and real in your answers to their questions, and to follow up wherever you can without becoming a pest. Above all, be sincere and humble as Charlotte explained:

I’m not a very formal person, perhaps I should be more official sometimes, but I’m very open, I am your new best friend. Straight off the bat, I want them to know that I am not

judging them, I am learning. I am learning from them, I hope they can learn from me.
(Charlotte)

Charlotte said she wasn't comfortable with the term "equity building"; she thought it was something "wordsmithy" people might come up with and thought it sounded too calculating. However, Charlotte did relate many different ways in which she built equity with the four teachers she was assigned to work with. Charlotte put herself at the teacher service; she wanted to help teachers fill their "educational toolbox", and she was ready to take any steps to do this. Charlotte also said that she would help cover classes, change their displays, review their assessments, and even help move desks:

Unfortunately there were times when I still had to say, "Hey I know that you don't have a whole lot of time, would you like me to help you benchmark this kid?" Like having those times of desperation, especially I found that those harder teachers to get through to, I could say, "Hey can I help you with something? Hey let's move desks around today..." But you know you had to do that, and build a relationship and there. And yeah, that was pretty cool. I miss that school, I like that school. (Charlotte)

Moreover, she said that one of the best ways to start relationships with teachers was to help them deal with struggling or challenging students.

I read all the reports and all the write-ups on these bad kids, and I listen to people talk about these bad kids and I am stepping very much into that special needs role because I really want help teachers in dealing with those bad kids; most troublesome behaviour kids. And coaching. Like I'm about to go into a school, a life skills program because we have identified some students now, who need these additional supports. We just keep pushing them along, and they weren't even standing out as behaviour kids. (Charlotte)

Charlotte had background in special education and a strong commitment to helping children with special needs and the teachers she worked with soon became aware of this. Charlotte said that teachers would come to her with particular learning issues and ask her to observe the students in their classroom so they could come up with strategies that might help both the teacher and student. Charlotte said that this student-centered and specific work often led to larger discussions related to the instructional goals of the improvement project. When other teachers on staff saw and heard Charlotte and her cooperating teachers problem-solving, they also came to Charlotte with their issues and concerns about students. Charlotte said that she never turned anyone away.

Considering Roles and Responsibilities

As many of the instructional teacher leaders pointed out, the relationship between instructional teacher leaders and cooperating teachers was complex. This relationship required constant adjustments from both parties, but especially from the instructional teacher leader. The instructional teacher leaders said that they needed to be responsive to various circumstances, personalities, and organizational constraints, as Caroline said many times in her interviews: “Everyone has their own stuff going on.” In several of the interviews, the instructional teacher leaders related instances when teachers were not ready to engage in coaching: they were overwhelmed by marking; troubled by a recent conversation with a parent; or beset by classroom management issues. It was in times like these that the instructional teacher leader often slipped in and out of roles: moving from coach to consultant (giving advice on classroom management) or even a counselor (taking time to listen to the teacher vent). Several instructional coaches said that, while side-by-side coaching was the goal of the project and what they had hoped to get to, they could not possibly get to that kind of relationship without going through some of these other roles first.

When I pressed them as to what these roles were, instructional teacher leaders came up with quite a lengthy and impressive list. Even more impressive was the fact that there was a great deal of agreement between the instructional teacher leaders as to what each particular role was called and how they might define the role. What follows is an overview of some roles that instructional teacher leaders felt they took turns fulfilling as they negotiated their relationships with teachers:

- ***observer and critical friend*** - In this role instructional teacher leaders said they were asked by their cooperating teachers to simply provide feedback about how things were going in their classroom. The instructional teacher leaders would sit, take notes, talk to students, and debrief and reflect with the teacher.
- ***mentor*** - Some instructional teacher leaders were paired with young, inexperienced teachers or with teachers who were placed in grade levels or subject areas that were new to them. In such cases, instructional teacher leaders said they found themselves in mentorship roles; they pointed teachers to the right resources; helped them

understand curricular requirements; and shared some of their own practices and materials with these teachers.

- **presenter** – Several of the instructional teacher leaders were asked to make presentations to larger groups, such as to a whole staff on a professional development day or to smaller groups of teachers in one subject area. A couple of the instructional teacher leaders shared that this was their least favorite role; it meant presenting themselves as experts.
- **cheerleader** – This term was used by a number of the instructional teacher leaders. These people felt that there were times when teachers needed validation. They said that the “cheerleading” was done to achieve buy-in, and was accompanied with smaller celebrations which were used to consolidate work and achievements to show teachers and students how far they had come.
- **coach** – One instructional teacher leader, Mary, explained her role as a coach with this analogy: a coach is expected to work with talented athletes to get the very best out of them. According to Mary, a coach does not have to be the best athlete; they cannot hope to complete passes or gain yards in the same way that players do. Coaches are to help refine the practice of others. As a corollary, instructional teacher leaders (instructional coaches) are expected to work with some of the very best teachers so they can get the very best out of them.
- **counselor** – Several instructional teacher leaders said that there were instances when they slipped almost helplessly from being a coach to being a counselor. They related circumstances when they worked with teachers who felt insecure, and they felt compelled to reaffirm the teacher and help them cope.
- **champion** – Catherine, perhaps more than any other instructional teacher leader, felt the pressure of being a “champion” for the project. In her interviews Catherine shared her substantial role in designing her district’s project and how the success or failure of it impacted how people saw her as an AISI coordinator and as a leader. However, Catherine was not the only instructional teacher leader to feel this way; other instructional teacher leaders said that they felt pressure to succeed, especially when they considered AISI’s emphasis on providing and meeting measures.

- **model** – Jane, Charlotte, Elizabeth, Maria, Will, and Anne all related experiences in which they had to take risks and try new strategies in front of groups of teachers. These teacher leaders said they enjoyed the challenge of performing in different classroom but that they were also aware that there might be extra-critical eyes on them.
- **consultant** – In some districts the word consultant was used interchangeably with coach; but, for the ten teachers in this study the word consultant was very different from coach. As the instructional teacher leaders in this study described it, *consulting* was problem-solving *for* the teachers and not problem-solving *with* the teachers. As such, the role the consultant—as the instructional teacher leaders described it—was similar to that of mentor or guide.

There were two roles that all of the instructional teacher leaders said they were not charged with doing and that they would never take on; that of being a fixer or evaluator. Every one of the ten instructional teacher leader interviewed made this perfectly clear; yes, they were to champion instructional change and challenge their colleagues to make changes in their practice but they did not have the administrative power nor did they have the desire to go in and “fix” weak teachers. The very suggestion that this might be a role made Maria quite prickly; she said that such a role would breach professional obligations and responsibilities. That said, Maria did relate an instance when she observed behaviour beyond what a normal and caring teacher would do; at that point she said she stopped being a lead teacher and took on the role of professional colleague who was obligated with reporting malpractice in accordance with the code of conduct.

While echoing the rest of her colleagues to say that she was not a fixer or evaluator, Charlotte also chafed about this. Charlotte said that she saw many substandard practices and she felt that teachers who just went through the motions should be confronted. Charlotte said that she did not think it was her role to hold them accountable—she didn’t have the authority— but she was angry that nobody else seemed to have the authority either:

When I came here [to Alberta], it was all of a sudden, you have to be worried about everybody else's feelings. And I get that. But I found that as the coach, that I was so worried about people's feelings, that there were things that were happening, that were really affecting students in the classroom that needed to be dealt with. But I couldn't play that person; I couldn't say those things unless it meant the student was going to be harmed. And I really didn't want to be that person, particularly when I had to be in there and that was my job description. I signed up to say that I wouldn't do that, and I didn't want to do that and I don't want to do that. But when it comes to the kids I'm very much like a mother bear. (Charlotte)

For Charlotte, this part of her job was challenging; from her interviews it could be seen that she felt torn by the need to support the teachers but that she also wanted to confront poor practice that hindered student learning:

And these are things that, the school division—not even myself—has mandated, and me as a coach, and I had go out there and say that I would do one-on-one coaching and I would help you do this, I would help train you. And I had people who just said “I don't have time.” And this is huge. We are identifying these kids to have these gaps - like this is huge. I know that's just a silly example but, but when you have these kids, and people come into the lunch room in they are whingeing and whining about this kid, and he's a bad kid and blah, blah, blah. And I'm sitting there thinking, “You are whingeing and whining, why aren't you doing something about it? Why can't I just ask you, what are you doing about it?” (Charlotte)

Charlotte said that principals and other leaders in the district were scared to confront marginal teachers and they simply ignored the incompetence or shuffled teachers into roles where they would hopefully burn out and subsequently leave the profession.

Charlotte said that both these actions were wrong; she said it would be kinder to give these teachers clear expectations, ample support, and then hold them accountable.

When it was suggested to him that, as an instructional coach being charged to investigate ways to improve practice, one could not help but be evaluative, Will explained that there were different ways to look at evaluation:

And now let me tell you why. Not evaluative in terms of that “I'm going to evaluate your worth as a teacher and report back on you.” Not like that. But always evaluative in terms of reflecting forward, always evaluating what we're doing that day with the kids and whether it is working or is not. It is an internal evaluation I think, and the deeper I got into coaching with certain people, the more ready all of us were to point things out. It was kind of assessing but not judging. So I guess it's how you would use the phrase or even the intent of your phrase. For us, it was always evaluating with an eye into the future and reflecting “Just how did this lesson go?”, and “What did you see?”, and “Did

you notice that we had five kids, for sure, that still just completely did not get it? So what are we going to do for them?" So we did not have a formal evaluative component but we were always reflecting. (Will)

Will explained that his work in the classrooms was specific and targeted; he and his partner teacher would pilot particular strategies. Will said that he and his partner teachers would team-teach and would ask each other "hard" questions; about whether students were engaged and whether a strategy made a difference in their understanding and achievement. According to Will, the two were not evaluating each other but evaluating their practices.

Negotiating Roles; Being Responsive

It's about negotiating in a relationship, it's about balance, and it is about knowing when to have the fierce conversations, and when to build on practice, and knowing that sometimes they just need a pat on the back today. That's what they need so that they will come back tomorrow. (Caroline)

The instructional teacher leaders said that how, when, and why they shifted from one role to the next had much to do with the contexts in which they were placed and the teachers that they were working with; they had to be ready to adjust on a minute-by-minute basis. Several instructional teacher leaders called this a negotiation; essentially they said: "This is what I can do and this is what I will not do; so tell me what you need and what the major concerns are in your classroom and we'll see what we can do together." Some of the teachers encountered said that they needed help only in planning; others wanted someone to watch them teach or to watch a particular student as they taught; and still others only wanted to discuss issues related to assessment practices or differentiated instruction. Maria explained that not every teacher was ready to have a coach or a lead teacher in their classroom:

There would have to be a comfort level for them [partner teachers] to do this. I would not force myself into a teacher's classroom, because some teachers aren't comfortable with that. And if they are not comfortable with having another teacher in her classroom watching; they are not going to be effective as teachers. They're going to be self-conscious about what they are doing. A lot of the time teachers would invite me to see the final product, and it would be "Oh look what my kids have done, and look at the wall, and look what they did!" or "Talk to my students and ask them about what they did, ask them a question!" and they were excited to share. (Maria)

The instructional teacher leaders said that they needed to consider the specific needs of the teachers they served and still be cognizant of their mandate to affect change; no matter which approach these instructional teacher leaders and their partner teachers agreed to take, it had to further the goals of the project and make a difference for students. The instructional teacher leaders said that they often had to encourage their partner teachers to go deeper with their improvement work by asking these teachers questions like: “That’s nice, but now what you prepared to do with it? How is this going to change what you’re doing in your classroom? And, what will you be able to give me as evidence that this change is happening?”

Sometimes the negotiation between teacher leaders and partner teachers involved exchanges: several coaches gave examples where they traded favors with teachers to secure their cooperation. Will shared that he covered for a teacher, taking her class on a field trip when a conflict arose. This action built credit for Will and, afterwards, he and that teacher spent many hours collaboratively planning together. Caroline related examples of similar exchanges when she would teach a lesson for her partner teachers:

So it became a case of: “If I take your kids, and model this lesson, and videotape it to give you a break, can we then have a focused coaching conversation in your prep time?” So there was creativity in being able to make two things happen. Number one, I got to model. And number two, I got focus time with them. So, in my world, it was win-win. And they still got to have prep time and we got to have a deeper conversation.
(Caroline)

Caroline said that she traded favors always with an eye towards the goal of the project. In her retellings it was evident that she would clear away obstacles, build equity, secure artifacts, and build on reflective conversations so she could move the project forward. Like Will, Caroline said she was very aware that time is precious in schools and asking teachers to give up lunch or after-school time would start things off with a deficit balance rather than a credit balance.

Charlotte and Catherine, when they talked about being adaptive and responsive, used the metaphor of “hats” to clarify what they did for both the teachers they worked with and for themselves. Because Charlotte and her fellow instructional coaches were asked to supervise the implementation of a new literacy assessment in the same schools they were

expected to coach in, Charlotte said that they had to be quite clear with teachers as to which hat they might be wearing on any particular day. If these district teacher leaders were there as a coach, they were looking to collaborate and share ideas. If they were there as district supervisors, they had to provide support and hold certain teachers accountable for completing the assessments. Catherine felt that she had even more hats to wear, she might go to schools as: a coach, as the district coordinator, as the supervisor of coaches, and as a fellow teacher, or as an administrator. She said that there were times when she had to sit teachers down and explain that, on this particular day, she would be wearing a particular hat and it would be inappropriate to act as if she were wearing a different hat.

Collaborating and Engaging in Reform

How lead teachers engaged their colleagues.

When asked how they used their time with teachers, the participants volunteered a wide variety of responses. The lead teachers said that the bulk of their work with teachers included: providing resources and online links to their colleagues; modeling strategies for the whole staff; helping teachers with individual students; and video recording and collecting other kinds of data with the teachers to provide evidence for instructional change. The lead teachers did not spend as much time working side-by-side with the teachers; all three had significant teaching responsibilities in addition to their lead teacher role.

One of the lead teachers, Anne, said that the majority of her work with teachers happened at staff meetings, during professional development days, and while working with teachers one-on-one after school. Being a lead teacher with a specific focus (improving writing results on standardized exams), Anne said she was not expected to visit classrooms or give one-on-one coaching, nor would she have been comfortable doing so. Anne said that she believed high school teachers were especially averse to having someone (a coach) come into their classrooms—they were “specialists” and having a “generalist” come in and make suggestions seemed inappropriate and demeaning. According to Anne, the best way to work with teachers was to plan with them. She said that sessions where teachers “bring and brag”, showcasing some of their best lessons, may have had some value but, by and

large, these sessions did not change practices. According to Anne, the best professional development value came from identifying a common problem, discussing it to come up with possible solutions, designing lessons and strategies useful in addressing the problem, experimenting with the strategies individually, and finally, revisiting all their work at a later date to hopefully start on another cycle of action research.

Like Anne, Maria also felt that the most effective way to get teachers to change their practice was to collaboratively plan. She said that she would bring pedagogical resources on inquiry and backwards planning and her colleagues would bring their curricula materials. She said that, once a series of lessons or a unit was built, it became a way of merging theory and practice for the teacher; it would also serve as an artifact or discussion point for Maria and her teacher to revisit time and time again. Maria said that she also found giving demonstrations (mini lessons) at staff meetings and at in-services especially useful. She said that these demonstrations may not have sustained the same kind of “deep learning” she and her teachers experienced when they sat side-by-side and collaboratively planned, but the demonstrations did allow more teachers to reflect on their practice. Maria said that the demonstrations also gave teachers examples of how inquiry might look in their own classrooms. Maria felt that taking a turn as the student was a useful experience for all of the teachers that she was worked with. However, Maria was not a fan of one-shot professional development sessions. As a lead teacher, she would do demonstrations at staff meetings but she said she would always follow-up; persistently reminding her colleagues through emails and classroom visits of their obligation to try strategies in their classrooms.

Similar to Maria, Elizabeth used both staff demonstrations and one-on-one discussions to help the teachers modify their practice. For both Elizabeth and Maria it was all about artifacts; could they gather evidence that showed that teachers were trying things in their classroom and that students were learning because of this? Artifacts included the lesson plans and assessments teachers developed, recordings classrooms in action, and testimonials and emails from teachers involved. As lead teachers, both Maria and Elizabeth were more comfortable in the classroom working side-by-side with teachers as they championed their improvement project than Anne was. Maria and Elizabeth said that they let their colleagues know that their own classrooms were always open and, if schedules

allowed, they could come in and demonstrate particular strategies in the classrooms of their colleagues. According to Elizabeth, these in-class demonstrations sometimes caused a bit of strain; teachers who initially rebuffed her help claiming strategies would not work with their classes were shown that such was not the case. Maria related a case where one teacher simply dismissed her in-class modeling and chalked it up as a “fluke”. However, in-class demonstrations and side-by-side coaching did not happen often for Maria or Elizabeth; it was not an expectation of their projects and they did not feel it was necessarily the best use of their time. Like Anne, both these lead teachers said that the most effective way to change a teacher’s practice was to catch them in the planning phase, follow-up as they implemented, and later reflect upon the lessons they had planned together.

How instructional coaches engaged their partner teachers.

The seven instructional coaches in this study were expected to spend more time in classrooms side-by-side with teachers, observing, modeling, and coaching. They had received training in instructional coaching and were cognizant of Joyce and Showers (2002), who maintained that the only way to truly entrench educational reform was through demonstration and coaching. As was touched on earlier, in one district, the team of instructional coaches was told that many instructional coaches spend only 20% of their time actually doing coaching in the classroom; their director challenged the coaches to flip this number completely and to spend 80% of their time coaching and 20% of their time doing administration and preparation. Caroline and Jane, who worked in this particular district, estimated that the actual percentage of time they spent working one-on-one in the classroom with teachers was probably closer to 35 or 40%. The rest of their time was spent planning, responding to emails, collaborating with the other instructional teacher leaders, doing whole staff or conference presentations, and researching in the focus area of their project.

For each of the seven instructional coaches, instructional coaching looked different. This difference was necessitated by the needs of the teachers involved, by their comfort levels, and by the skills and background of the instructional teacher leaders themselves. For instance, Mary said she worked with a teacher who was not comfortable handing over her classroom to another teacher. Instead, this teacher asked Mary to sit at the back of the

classroom and observe, make notes, talk to individual students, and find out how well her lessons were going over. Mary said that this arrangement suited her just fine. In contrast, Mary said that she also worked with another teacher who had also taken the instructional coaching, but the two could not make side-by-side coaching work. Mary said that they found the process to be inauthentic. It was not easy to establish the kind of give-and-take atmosphere necessary for this kind of coaching; but, as Mary pointed out: they were still only in the first year of a three-year cycle and there was time for that kind of relationship to develop.

According to Catherine, it might take two full years before you get to a real back-and-forth instructional coaching relationship with a teacher. Before that, there were many other things instructional teacher leaders and the cooperating teachers could do. Like the three lead teachers mentioned earlier, Catherine, and her colleagues Will and Louisa, felt that there was great power in collaborative planning:

The most effective way was the planning portion, where new ideas are introduced. Initially those ideas were met with hesitancy, as they [the teachers] were not sure how they would work. But you would brainstorm it together, whether it is the lesson or the strategy, you would sit down together to try and embed these ideas. Then they would suddenly get excited. But it is also in the way that you present it. If you present it in a positive way, and say this is how we can do this, you have a better chance. (Catherine)

Catherine said that for her team of instructional coaches, it was all about providing the right kind of support and slowly withdrawing this support so that the teachers could become independent - using their professional judgment to decide upon the most appropriate and effective strategies and approaches. She said that the coaches were wary of teachers who just wanted to “get stuff” or have a break while they watched someone else teach their class.

As coaches we sometimes encountered that – where teachers may be taking advantage of you, so sometimes it’s a challenge to know when to push, when to show, and when to pull back. When you relinquish control back to them, and say: “Okay I’m doing this; you are doing this.” We became good at that over the course of four years. The first year you are dazzling them with all the wonderment of what you can do. The second year we got more people on board, new ones, so you are still doing some of that dazzle thing. The third and fourth year, it is, “Okay I’m doing this, you’re doing this, let’s meet back here and discuss how it went.” (Catherine)

However, as much as there was a certain amount of success in simply sitting down with teachers, helping them plan, and then following up, according to Louisa the success of collaborative planning paled in comparison to the success the coaching team experienced once they had moved into full-blown, action research, coaching relationships:

If I could put all my eggs in one basket it would be to continue the cycle of action research that we were doing in Cycle Five. While the collaborative planning piece was very important in the past, like in Cycle Four I worked with a lot of teachers where we would sit and plan together, but they didn't want to do the implementation piece together. And a lot of times those plans would just fall flat. For whatever reason; maybe they just didn't get to that part, or they implemented it but not really in the way that we talked about, or they skipped parts of it and kind of missed the constructivist introduction and just dove straight into transmitting information - that kind of thing.
(Louisa)

Both Louisa and Will pointed out that how the new strategies were implemented was critical to the success of the improvement project. Will gave examples where teachers failed to understand the importance of letting the students struggle through a learning challenge and short-circuited their own lesson by summarizing and handing the essential learnings to the students. Will said that these teachers were too focused on being "efficient" and failed to understand how they might be more effective when they let the students struggle on their own. Louisa explains further:

It is the class interaction and demonstration that has made the huge difference, as well as the follow-up and the reflection part. So I would say that cyclical part of: plan a little bit, implement a little bit, reflect all the time every day together, kind of on equal footing, and then back to plan. That was hugely powerful, and I found that this year, with the teachers that I was working with, and for my own selfish satisfaction, I found that there was a lot more progress with student learning and the students had a lot more to say about what we were learning in class. I just had such a better picture of how the students were doing with what we were working on.... I can say, for sure, that the students have benefited from the things that we were working on, and the teachers were more enthusiastic about the things that we were working on and were moving on to the next part. They were ready to address needs that we can quite easily hit. So it is the constant contact and a lot more time together. (Louisa)

In this last quote, Louisa identified two essential elements in how the instructional coaches successfully engaged teachers. First, she said that there was constant contact; when things worked well between the cooperating teacher and the instructional coach there seemed to be a fair amount of communication, both face-to-face and through email,

and this communication was not one-sided. Charlotte, Will, Jane, and Caroline all related examples of teachers who felt comfortable coming to them with their questions and asking to come and see what was happening in their classrooms. Second, Louisa identified a cycle of planning, implementation, and reflection. As Mary also pointed out, it was one thing to implement a strategy but it was another to see the strategy's impact upon students' learning and to decide what the next steps may be.

For the seven instructional coaches and the teachers they worked with, side-by-side instructional coaching could look and feel quite different, depending upon the teacher they were working with, the grade level they were working at and the school context and community they were placed in:

It really depended on the teacher's comfort level and what some of them were willing to be a part of. For some teachers – well, we really respected what they liked – for some teachers they wanted to maintain control of their classrooms. They wanted to be in front, they wanted to be trying stuff out. They wanted to try the new procedures or strategies. Sometimes they would say “Can you make it here? Can you see it?” And you know, depending on the schedule, sometimes I could and sometimes I couldn't. (Will)

And the side-by-side piece looked different on each day; it may have been just quick conversations with each other, it may have been team teaching, it may have been modeling or just inserting a piece, or it may have been just being available and saying: “I want to try out this strategy; what do you think?” For those teachers, they knew that we were in the trenches with them. And so I think it elevated them more into the open to being a risk taker, because they knew there was someone right there with them, taking risks with them. They shared a lived experience. There was shared risk-taking, shared vulnerability. (Caroline)

In this last quote, Caroline touched upon a strategy for engaging teachers in the reform that was reiterated in many of the other interviews; the idea of shared risk-taking and shared vulnerability. She explained how she felt like a “fish out of water” when it came to helping teachers in grade levels and subject areas she had little experience in. As a secondary teacher, what did she know about Kindergarten? And, Caroline said that, for her, her lack of experience gave her an opportunity to ask rather than assume. She said that she came into classrooms not as an expert on these children or on the curriculum but rather as one who might only ask questions and suggest possibilities:

They [the cooperating teachers] would come to me and ask me: “Would it be okay if I tried this?” And I would say: “Try it! You are the expert in your curriculum and you are the expert with your kids; I am just here to lend support.” And then there were times when I turned around and said, “Hey, do you mind if I try this?” And then I was in the position to be on an equal playing surface. And I could try things with small groups or even with whole classes and they could observe me. And it became a shared process, and we both had ownership in the growth of each other. So I think they knew that I was learning just as much as they were; I was learning alongside of them. (Caroline)

The four instructional coaches in this study, who were assigned to work primarily with four teachers each, could relate more examples of this connected, action research, coaching; their partner teachers were expected to engage regularly in coaching conversations and participate in in-class coaching. The one exception was Charlotte who felt she was always coaching but not in the way suggested by the videos and the books that the team had read. Instead, Charlotte said that she did some team teaching, some collaborative planning, some modeling and observation, but:

The side-by-side coaching thing was not effective for me. It wasn't. I know a lot of people say that it is, but my teachers were not comfortable with it. Maybe in the lower grades perhaps, because the kids are really aren't onto that, but when you're in the middle school or the high school and you are side-by-side coaching, no, it just wasn't working. The kids would just sit there confused, and say “What is going on in here?” And even after you would tell them, they would just say, “This is silly.” You know like, middle school kids can be harsh sometimes. They can be very judgmental. (Charlotte)

Charlotte said that she also found the practice of cognitive coaching (a way to help teachers solve their own problems) as she had been trained, inauthentic and forced. She said teachers kept asking her: “What the heck are you doing?” “Why do you keep answering my questions with more questions?” and “Aren't you supposed to be the expert? What can you tell me?” Charlotte said that cognitive coaching training made her more aware and kept her from being judgmental or moving too quickly to solve teacher problems, but she felt that, unless the cooperating teacher has had training in cognitive coaching too, it was not that helpful. Perhaps one reason why Charlotte did not move to one-on-one in class coaching in the same way as some of her colleagues was because she did not limit her support to just the four teachers assigned to her; Charlotte said she would help any teacher who came to her with a question or an issue, and she was spread almost as thin as Louisa, Will, and Catherine in the other school division (these three served six or seven schools

each). Charlotte also had trouble “following the whole coaching cycle,” as she put it. She said that many teachers did not have the time to sit down and go through pre-conferencing or to do the kind of reflection they were expected to, after implementing strategies. In the end, Charlotte helped her teachers in the way that she and her teachers were most comfortable with, which was through a significant amount of demonstration on Charlotte’s part.

Due to the more invitational structure of their project, the second set of instructional coaches, Will, Louisa, and Catherine, could also relate examples where they engaged teachers in meaningful work and coaching relationships evolved but they also had quite a number of teachers with whom they worked with only occasionally and, according to the coaches, this sometimes resulted in only superficial and temporary changes in practice. For instance, Will related an example where he worked with a teacher to bring in a more constructivist approach and together they developed a pre-lab assignment that would challenge the students and would hopefully activate them for the lab they had to do. Unfortunately, when it came time for the teacher to use this pre-lab assignment she was conscious of the time constraints for her unit and rushed through the assignment in ten or fifteen minutes giving the students a quick summary and telling them to skip parts so they could get down to the lab and do the “real work”. According to Will, this teacher missed the whole point of the assignment they had built together and since he worked with her so seldom there was no opportune time to revisit the lesson and help her understand why. In their interviews Will, Louisa, and Catherine related a number of instances when prime opportunities were wasted because a teacher was not ready or the coaches had not established give-and-take relationships necessary to make real and lasting changes.

When Will was asked what he thought was the most effective way of engaging teachers to promote instructional change, he did not talk about presenting, consulting, modeling, coaching, or reflecting on artifacts like many others did; instead, Will chose to narrow it down to two important aspects of instructional coaching. He felt it was important for an instructional coach to know how to ask the right kinds of questions and to know how to “schmooze”. When Will drew attention to these two skills he was talking about what Bowman (2004) describes as “adaptive capacity”. Will said he believed it was essential that

instructional teacher leaders know how to “read” the teachers they are working with and get a sense of when they are ready to be pushed or pulled or left alone. He related several examples where he had pushed too hard and the relationship broke down, temporarily. Will felt that simply telling a teacher what they might or might not do in the classroom would not help their growth but asking the teacher about the choices they made and the possibilities of where they could go next, would yield much greater dividends. He said that, with the right amount of schmoozing and with the judicious use of questions, an instructional teacher leader could move easily back and forth between light coaching and heavy coaching.

Summary

The second of the four adaptive processes that the instructional teacher leaders experienced as they led or supported instructional reform was Engaging. When the lead teachers, instructional coaches, or consultants began their work with teachers, they were required to gauge the circumstances and contexts for each teacher they work with, adapt their approach, and initiate conversations and actions that built relationships and moved the school improvement work forward.

One pre-requisite to this adaptive process was securing the support and understanding of the school administration. The instructional teacher leaders needed to ensure that they were working together with the administration and to find ways that each could assist the other in providing instructional leadership to the staff. Another part of the engaging process was connecting with teachers. Some instructional teacher leaders called this “schmoozing” and others referred to it as equity building. Whatever it was named, the core activity is the same. Teachers needed to feel connected with instructional leaders; it helped build trust and established professional and personal rapport. When instructional teacher leaders failed to build equity through informal conversations and small acts of service they often encountered resistance or apathy.

When the teacher leaders began their improvement work, it was imperative that they sought out partners or cooperating teachers willing to take risks and open to working on their practice. Often these teachers were already informal teacher leaders on the staff;

they had an interest in professional development, had some credibility with other staff members, and were secure and confident in their practice. The ten instructional teachers had many terms for these teachers (keener-beaners, first adopters, kindred spirits, pioneers...) and finding these teachers was critical to the success of their projects.

Another critical element in engaging was negotiating roles. As the ten instructional teacher leaders pointed out, each teacher-coach relationship required bargaining and bartering about how the two might go about their work. Some teachers were quite comfortable with side-by-side coaching, but many others were not. And, not all the instructional teacher leaders were comfortable with that style of coaching, despite the training they may have received. With this in mind, it was important for each instructional teacher leader to discuss and establish parameters with the teachers they worked with. The instructional teacher leaders needed to be clear about what they were prepared to do and what they were not prepared to do.

Finally, and most importantly, instructional teacher leaders, together with their partner or cooperating teachers, needed to find ways to become engaged in the work of school improvement. However, how they became engaged was dependent upon the nature of the project itself, the negotiated roles of the teacher leader and the teacher, the time and opportunities that presented themselves, and the needs of specific teachers and the students they taught. Most of the instructional teacher leaders suggested that simply sharing articles or research was not enough. Improvement work needed to be timely and purposeful; teachers needed to see direct results in their classroom. One of the best places to start on this meaningful work was to collaboratively plan lessons and units that incorporate research-based strategies into upcoming lessons. That said, teacher leaders who had successfully implemented side-by-side coaching routines declared that coaching in addition to collaborative planning was more powerful than collaborative planning alone. Coaching ensured that strategies and their corresponding pedagogical principles were properly and completely understood.

The next chapter focuses on the third of the adaptive processes: Responding. With this process, the instructional teacher leader learned how to deal with roadblocks and challenges that had the potential to undermine the project, damage relationships and cause

successful professionals to begin to doubt their ability to lead for reform. The participants in this study had much to share in terms of responding and persevering; developing coping mechanisms and strategies that helped in dealing with resistance or encountering personal, professional or organizational barriers.

Chapter 7: Responding

Dealing with Challenges and Balancing Priorities

In chapter five, I shared AISI instructional teacher leader insights about clarifying goals, roles and intentions as they championed instructional change in schools. Knowing exactly what they were expected to do, according to the project mandate, allowed these instructional teacher leaders to enter with some measure of confidence when addressing prospective cooperating teachers. Then, in Chapter Six, I explained how these instructional teacher leaders approached their work and engaged their colleagues in school improvement. This process challenged instructional teacher leaders to work strategically: securing administrative support, making connections with teachers, encouraging informal leaders, negotiating roles, and focusing on purposeful work. Each of these actions forced teacher leaders to use their adaptive and reflective capacities. However, championing school improvement was sometimes quite challenging; there was still much room for misunderstanding, misinterpretation, and miscommunication.

The ten instructional teacher leaders in this study also shared many of the struggles they had when meeting with teachers and principals throughout the improvement process. Often, early in the project, sometimes after months or even a full year of training in anticipation, instructional teacher leaders abruptly discovered just how different they might be perceived by teachers and principals. Several instructional teacher leaders remarked that they went into the schools with a “Pollyanna-like” attitude, ready to change the world and believing that everyone in the schools would just line up to follow along with them. They soon discovered was that it was not quite as simple or straightforward as they had imagined. They also discovered that there would be many different problems to solve as they worked to move the project forward. This chapter will take a closer look at how the ten instructional teacher leaders persevered through their challenges by:

- Responding to Perceptions, Expectations, and Personal Realizations
- Responding to Organizational Challenges
- Responding to Relational Challenges
- Persisting and Persevering
- Weighing Personal, Professional, and Family Needs

Responding to Perceptions, Expectations, and Personal Realizations.

Responding to teacher perceptions.

I sat down beside her before the superintendent's address, and this teacher made a sarcastic comment about what the day would be about, and about the upcoming superintendent's address and I felt the need to—and I can't even remember what she said—but I know I took a defensive position to that. And then she started to make some other comments. And I asked her you know, "Where is this coming from?" Because I never would've anticipated it, based upon our previous encounters and relationship? But the last comment she made, just before the superintendent's address was: "I can't believe it! It did not take you very long to become one of them!" And that was one of our last encounters. (Caroline)

In their interviews the ten instructional teacher leaders shared stories about their early experiences in going to schools and meeting with teachers. As has already been written, some instructional teacher leaders worked with volunteers; others had to "sell the project" and seek volunteers; and still others were paired up with teachers who volunteered or were *told* to volunteer. This made the first meeting with the teacher very important; the instructional teacher leader needed to respond to any misconceptions and make adjustments:

Prior to having these conversations, we thought this teacher was in a different place. It's always a challenge because my work had to shift substantially from where I thought it was going to go with this person and the goals we had set, versus where we thought we had to go. I had to go more into the role of being an instructional coach, a resource person, modeling, co-teaching, yeah. (Jane)

The instructional teacher leaders said that the teachers they initially encountered in the schools had many different perceptions about the improvement project, the lead teachers and the coaches involved, and their own responsibilities. As has been already mentioned, the instructional teacher leaders often met teachers who saw the improvement initiative as just another annoyance that they had to put up with. These teachers played lip service to the project; they would nod and agree and sometimes even work with the coaches but as soon as the instructional teacher leader left the building everything stopped and they went back to teaching the way they had always taught.

Somehow I knew very well that when I left that building it was not going to change. Like, she's not changing practice. She didn't hear a thing we said all morning long, and she will just carry on doing her thing. (Catherine)

Mary and Charlotte said that they encountered teachers who were worried about getting "tattled on"; who felt like the instructional teacher leaders were spies for the principal or central services and that these coaches were there to ensure that teachers taught in a certain way. These nervous teachers were reluctant to share anything with the instructional teacher leaders.

And the other teacher was so worried about being judged, because she was kind of coaxed to volunteer, even though she was a strong teacher, the way it was put across to her, was, you know. And I mean, you know, the evaluation process here, for young teachers, and you are not on permanent contract yet, there is so much evaluation. You are evaluated, and you are scared to say things because you want that permanent contract. (Charlotte)

And Louisa and Charlotte met with teachers who resented instructional teacher leaders due to their age.

For me my struggle has been: "Look you are only 28, what can you do it 28?" I don't think age defines it, I don't think even necessarily experienced defines it. I mean people might say she's only taught for six years. (Charlotte)

Other instructional teacher leaders also met with resentment for reasons related to training, length of experience in that particular board, or for a host of other reasons – this resentment could sometimes be attributed to jealousy or a sense of inadequacy on the part of the teacher involved. One of the learning coaches, Caroline, related a dramatic example of a teacher misunderstanding her new role. In this particular instance, Caroline's personal and professional choice to become an instructional coach was publicly questioned by family:

And the argument ended with my cousin telling me that: "If I wanted to sacrifice my children for the school division, that I was welcome to - but she would not be doing this same thing!" So, many of my initial challenges have been personal ones. (Caroline)

One of the most frustrating issues for the instructional teacher leaders was the fact that many teachers, with whom they had formerly had relationships with as colleagues, now viewed the leaders with disdain or mistrust, simply because they had moved into

more of a leadership role. Teachers made passive aggressive comments about “going over to the dark side” and becoming “one of them” (a member of central services), as Jane writes:

At first I didn't know what had changed, I did read into it too much at the beginning. But there were subtle things, like just the social atmosphere had shifted in the staff room let's say, when I was present. Compared to what had taken place when I was just a staff member. So the jovial jostling and the jokes and those kind of things lessened, less people included me in that when I took on this role. (Jane)

Jane was not alone in sensing a change in atmosphere, most instructional teacher leaders related similar stories about teachers who would not engage in conversations about pedagogy and would keep to safe subjects like weather or sports. Sometimes teachers, as several instructional teacher leaders shared, actually went out of their way to “perform” for the instructional teacher leader in front of the staff by dropping a few “buzzwords” and intimating they were totally in agreement with the whole project; they just did not have time to have someone come visit their classroom. Jane found her initial interactions very difficult and she stressed about them; she said she often went home and discussed these incidents with her husband. When the topic of buy in came up at the regular meetings of the instructional coaches, Jane and the others would share their stories and commiserate about how difficult it was to craft authentic relationships when there was a lack of trust. However, Jane said she found ways to respond, she persevered and she said she came to realize that the work she did with those teachers was only a small part of who she actually was:

I really just have to remind myself that my work with those teachers is only a small part of who I am. I come back to my home and my family and my kids and my husband, and I realize that my worth is not dependent upon someone else's disposition, someone else's moods. (Jane)

Moreover, as Jane explained, people at central services sometimes gave the collective group a poor name:

Unfortunately, it exists out there, that—there is that one story of what he can look like to be a member of division office. Much to the detriment of many people there is that one story of what it is to be associated with that person. But people make judgments on that one impression; they don't see the layers of that person, they don't see the

potential of a person. And so they confuse you with your new role, with what they perceive to be your role. And they think that you have to be a certain type of person to be that person who works in central services. But there are many different types of people working at central services. And we need to tell more stories and break down those barriers so that they get to know us better. We need to be out there and visible and sharing and celebrating what we are doing here. (Jane)

The instructional teacher leaders were asked to share ways in which they responded to the various perceptions they encountered once they started working in the schools. Like Jane, most instructional teacher leaders did some introspection to reaffirm themselves, remember their training, and focus on the bigger picture of the instructional goals of the project. In addition, as Catherine shared, one of the best strategies was simply to get to work with whoever was willing to work and to do their best to ignore passive aggressive comments. Like Louisa, many of instructional teacher leaders found they had to resort to using soft skills they had developed through their formalized training in cognitive coaching or from their own life experiences. As Will and Elizabeth explained, the worst an instructional teacher leader can do is whine or walk in and tell teachers that you are some expert who will challenge their practice. The best thing you can do is simply ask teachers about their world and what the stressors might be in teaching grade four science (for instance).

Most instructional teacher leaders also expressed how important it was, especially in the early going, to feel like you were part of a team going forth to lead this instructional change. For lead teachers, this meant sharing their stories at monthly half-day “call backs” and for the instructional coaches it meant informal and formal meetings back at central office, often with their directors in attendance. At these meetings, instructional teacher leaders could commiserate, rededicate, and suggest strategies to each other about how to persevere in their role and cultivate authentic, lasting relationships with teachers.

Responding to administrator perceptions.

I don't really think they understood we were trying to do. It had been explained thousand times, but, they didn't really know why I was there. (Mary)

Teachers were not the only ones to have misconceptions or different expectations about the project and their role in it; instructional teacher leaders related a number of

examples where administrators were on much different pages from instructional teacher leaders. In their accounts the instructional teacher leaders attributed this disconnect with the principals and their administrative staff to the fact that many school principals were preoccupied with the management of the school and did not pay as much attention to providing instructional leadership.

Jane explained how she had to be responsive to different school arrangements based upon the principal's understanding of the project and their role:

I have experienced both [support and interference]. If the principal is not on board and he does not believe in the philosophy behind coaching and collaboration and providing the time for this - it is very difficult to move things forward. And so, in one of my situations I had a principal who would provide the time; it was not an issue to arrange a sub, or partner two classrooms together so we can have a post conference or so we could preconference or do some planning. In the other situation it just wasn't tabled; the situation was just kind of avoided. We were expected to make it function in the current structure. So he wasn't going to be committed to being a little more flexible; he did not want to make other accommodations. He didn't see it as a priority. And my teachers and I had those conversations, but we had to embed them into times when the students were there and so it was a learning curve, and I learned that it could be done. But it was a challenge. And it was so much easier when the time was set aside and it was just me and the teacher. It can be done but things don't move forward as quickly. It is important to have a champion who makes time and resources available to you. (Jane)

Will also ran into situations where principals did not properly understand the purpose of his visit and how the visit would take place:

Sometimes the principal just assumed that if the substitute wasn't assigned to any particular person, that they could just take the substitute for themselves. And do what they wanted. But no, the substitute is paid for and brought by the instructional coach; they decide what is going to happen with the sub. So there was a bit of a power struggle, and you have to draw a line in the sand. If you don't, then the principal is just going to start assuming a lot. (Will)

Overall though, the instructional teacher leaders said that principals were often appreciative of having what they considered to be an ally on their staff, however these administrators were not ready to dive right into the topic of instructional reform or support the reform by providing preparation time for teachers or resources. In their interviews the instructional teacher leaders said that they encountered: principals who

initially thought that the initiative would help “fix” a particular teacher and expected to receive regular reports from the instructional teacher leader on how they might be making progress with this particular teacher.

The evaluation and supervision component was something for the principals and the superintendent to figure out on their end. I’m not here to fix, that’s the admin job. I know we could do these kinds of things but that would completely change the relationships and the nature of our job. So it is about that, about the negotiation also with the principals. (Catherine)

As mentioned earlier, instructional teacher leaders did encounter principals who perceived them as a nuisance and inconvenience; and principals who perceived instructional teacher leaders as stressors for their staff and wanted to protect their teachers and from feeling overloaded. However, the instructional teacher leaders also related examples of principals who, while they may not have completely understood the project or the project’s goals, supported instructional teacher leaders by matching them with compatible volunteer teachers and providing support through advocacy at staff meetings and in one-on-one meetings with their teachers.

In any case, the instructional teacher leaders were challenged to respond to preconceptions and perceptions of the principals they had to work with and for. Anticipating misconceptions, several instructional teacher leaders mentioned just how important they felt it was to regularly touch base with principals. Caroline said that the first thing she would do when she came to school was to “check in” with the principal, to make them aware of who they were working with, where they would be doing their work, and what they might expect. She said she would also invite the principal to pop in and observe, if there was time. And, upon leaving the school, Caroline said that she would always say a quick goodbye. Many instructional teacher leaders reported that they also followed this practice: they said that they had learned early that many principals they worked with appreciated knowing what was going on in their building.

Responding to personal misconceptions.

The first two months were very difficult to be honest. You see I wanted to change the world, and I wanted it done now. It was me; a lot of it was me. I became aware of, I guess, that I had always kind of lived in a little bubble, and I thought that since I was

aware of certain recent research, and best practices, I was headed that way with the AISI projects and I was headed towards those things, I just kind of assumed that everybody in the district was. And they might share my enthusiasm, but not so much. Yeah. Some initial problems I experienced were due to the fact that my bubble had been burst. I suddenly saw that things were different from what I thought they were. (Mary)

Most of the instructional teacher leaders said that they had to do a reality check when they moved from the anticipatory or planning stages of their project, to actually working with teachers. Mary found this was especially hard; as an elementary teacher she had been responsible for what was happening in her classroom and she did not have all that much to do with what was happening in other people's classrooms. Once she became an instructional coach she said she discovered that most teachers she worked with did not plan to the extent that she did, in fact some teachers not only did not have lesson plans they failed to even write down jot notes and reminders in their teacher planning book. Many teachers did not seem to care about professional development or improving their practice; they were looking for the easiest solution as they taught. Seeking easy solutions often meant using worksheets and handouts that kept students busy and seemingly engaged, but did not really challenge them.

Mary said that she lamented discovering how much the world had changed; she felt like many younger teachers did not have a good handle on planning or assessment and they were unwilling to put in extra time at night to prepare for their lessons or review student work. In fact, she said, many younger teachers were quite protective of their "free time" and saw teaching more as a job and less as a profession.

The new teachers coming up have a different work ethic than we did. And maybe they will live happier and healthier lives because of this, because they're not as stressed. But it's different, and I'm not sure that it's altogether professional, although I'm not sure if that's quite the right term for it. But their commitment seems to be on a different level, a different page. (Mary)

In contrast to Mary and Jane, Will's first few interactions as instructional coach left a much different impact. Although he said he was disappointed with the level of professionalism of some of his colleagues, he said he also came to realize how much he had to learn to take on his role of instructional coach.

I think my earliest disappointment was finding out that I didn't really know what I thought I might have known. I mean, in terms of knowledge I am low man on this team's totem pole. I mean, I don't know how I scraped myself into this job, like what if they find out that I'm a total farce? But I came to realize that if you are honest and you admit to the teachers what you know and what you don't know, that they are more than willing to help out or overlook things to help move things forward. (Will)

Will said that he was one of a few on his district's team of instructional coaches who did not have a Master's degree (initially he consciously chose not to pursue one—he said he did not want to become disconnected from 'the real world'). However, Will confessed that he was soon in awe of the way other coaches could refer to specific research or authors and connect them to what was happening in classrooms in their district. Will said that he went into the coaching role thinking his experience as a special education teacher in a secondary school had prepared him for almost every eventuality to do with student behaviour and differentiating instruction; but, when he encountered teachers who turned to him for expertise and advice, he found himself feeling "flat-footed" and tongue-tied. In addition, Will acknowledged that in becoming an instructional coach he discovered a myriad of contexts in situations he had never encountered. Will said that these early experiences with both his fellow coaches and with teachers in the schools pushed him to become much more reflective, to take on a listening attitude, and to rededicate himself to learning more about his craft and about recent research that might impact teaching and learning.

For Charlotte, the struggle always was in defining who she was and what her role was towards the teachers. "I just want it to be straightforward. I am a cut and dry person; I like to know where I am going. I like to know what's happening." Charlotte said that she felt, despite of all the work that she did with instructional coaching team, that she and the rest of the team never really had a clear handle on what their identity was. Were they experts? Were they collaborators? Were they managers? And the fact that Charlotte and the rest of the team were given the charge not only to be instructional coaches but also to support the teachers and to direct the teachers as they implemented a new literacy assessment made this negotiation of roles and expectations even more challenging.

Responding to Organizational Challenges

Over the course of the interviews the ten instructional teacher leaders were asked, in several different ways, about the kinds of challenges they encountered as they championed instructional change. Were the obstacles they faced related to project design, institutional limitations, lack of training, lack of support, challenging interpersonal dynamics, their own personal limitations, or factors that seemed to be almost unrelated to the role and responsibilities they were given?

Responding to time constraints.

Time is going to be an issue; no matter who you talk to in the vast majority of professions. Talk to teachers - they want more time. And time is generally associated with dollars, and there's only so much creatively that you can do. (Caroline)

When asked about organizational challenges related to instructional teacher leadership the number one concern for the ten instructional teacher leaders in this study was the finite amount of time in which they could accomplish the goals of their projects. The instructional teacher leaders referred to the fact that within the parameters of AISI and three-year cycle on which it was based, it was challenging to get the message out, build relationships, engage in meaningful work, and start to establish lasting changes. Several instructional teacher leaders, most notably Catherine and Maria, pointed out that AISI initiatives were supposed to gain traction over the three-year implementation period and that the resultant instructional changes were to be so ingrained by the end of the cycle that funding would no longer be needed to sustain the change. Maria said that this goal was all well and good for some projects, especially if there was extensive buy-in and support from the leadership group, but all too often the instructional teacher leaders would be left to try and make inroads *on their own*. In addition, several of the instructional teacher leaders pointed out, many AISI projects were premised upon a pullout program in which students would receive one-on-one attention while the rest of their class continued with the regular programming. Such AISI projects would be unsustainable without continued funding and allocated time based upon this funding.

Time is always an issue; collaborative time, time away from the kids, your own time. It is always about time. Money wasn't an issue. Resources weren't an issue. It was all about time. (Anne)

In addition to the issue of time-limited funding, the instructional teacher leaders mentioned many other ways in which time became their enemy as they tried to lead for instructional reform. Due to their part-time role, the three lead teachers in this study (Anne, Elizabeth and Maria) said that they were faced with special challenges when it came to using their time wisely. They shared that they were expected to teach in their own classroom the majority of the time and then also support their colleagues. But, as the three lead teachers shared, matching their schedules so they could observe colleagues teaching certain subject areas was challenging; it often involved juggling their own classes or finding people to cover while they stepped out. In particular, both Maria and Anne expressed guilt and frustration at being out of their classrooms and away from their students too much of the time. Obligations like attending district workshops or provincial conferences or working with individual teachers pulled these two lead teachers away from what they saw as their primary responsibility; supporting the twenty-five or thirty children that were entrusted to their care in their own classroom. Elizabeth did not experience these pressures related to time in quite the same way as Maria or Anne. Due to the arrangements that were made for shared busing in her district, Elizabeth said that her schools had a wealth of non-instructional days in which she could sit with colleagues and talk about the work they were doing. Moreover, Elizabeth said that her mode of instructional leadership did not necessarily require her to spend extensive time in other classrooms.

One instructional coach, Mary, explained that when she was a lead teacher she also found time management to be challenging. This was because she was out of her classroom so much; she said she felt guilty about that. However, she said that she also had the opportunity to attend a great deal of professional development afforded to her through AISI. In addition, she really enjoyed learning more about effective practices. Nevertheless, in her efforts to try to encourage and sustain instructional change in her local schools time was a significant factor for Mary:

Time was huge, especially in the AISI lead teacher role that I was a part of. Like I said, before I would go to the PD, I would read all the books, I would do what I was supposed

to do, but I never felt like I had to come back and share it effectively. I would say, “Hey this is what we talked about!”, and then nobody would care, even five minutes after that. It was time to move on. And it was never interesting or important enough for anyone else to research more, or to ask for more information, or to try and run with it; because they didn’t feel motivated. And that may have been my doing, but I think a lot of it was just time. We just didn’t have the time to share it properly. (Mary)

In this case, Mary’s issue with time had more to do with giving teachers time to process and implement many changes that she was suggesting. Mary felt both she and her colleagues needed more time to work together and that was why she was so excited to become part of the district-based instructional coaching team. Mary said that she felt that this new approach (the new AISI project using instructional coaches) would finally provide her with time to effectively champion instructional change and to work one-on-one with willing and open cooperating teachers. She said that no longer would she be simply mentioning concepts two groups of teachers with little or no follow up; the new model of instructional coaching required commitment on both ends of the relationship. However, in spite of what Mary shared about the gift of time that she would have as an instructional coach, like most of the other six instructional coaches she still found time management as a significant and ongoing challenge.

And it was often when we were gone to a lot of PD, or there were a lot of holidays in that time period. I could not establish the flow of the pre-meeting, doing the lesson, and then the follow-up to that. And by the time you are following up on that, it was almost too late because it was almost forgotten. And there was some of that, especially in busy times and at certain times of the year. (Mary)

Instructional coaches explained how time constraints affected the progress of their projects each and every year. The instructional coaches I interviewed explained that at certain times of the year, teachers did not welcome instructional coaches into their classrooms. They said that school start up, the pre-Christmas run-up, middle of the year exams, report card time, June (with all its field trips), and many other educational events seemed to trump the work that the teacher leaders were hoping to accomplish. In addition, they said that, especially for the instructional coaches assigned to multiple schools, finding time to balance the demands of the teachers they had been working with so they could support these teachers to complete coaching cycles (preparation, implementation, and reflection) proved to be a

logistical nightmare, especially in jurisdictions where there was significant distance between schools and the central office location.

However, all of the instructional teacher leaders found ways to overcome their time challenges. Anne convinced her school administrators and district leadership to provide her department with working time. Due to her advocacy, Anne and her cadre of English teachers were able to carve out working time over lunch hours and after school. While others in the school and district had to attend workshops, meetings, or conventions, Anne's English Department could continue working on their project.

Will related an especially memorable example of how problem-solving and using time as an asset to distribute actually helped provide momentum for his particular project:

And it wasn't until Christmas in that first year, in December or January, when we said to our coordinator "We're just not getting any buy-in. Is it okay if I would just bring a substitute out with me? You know, because people just don't have time." And she said "You know, let's try that." And that, that was the game changer; providing time. So all of a sudden it wasn't "Come see me on your prep, which you covet, you know..." It's like Gollum and the ring you know; you stay away from my time, my precious time. So now it was like, "Oh, you're actually going to bring in a substitute for me? Really? We can have a couple blocks to sit and talk?" Then all of a sudden, things really took off.

And I would argue that time is the number one concern for teachers doing this kind of work. Just making that change completely altered our program, right there. (Will)

Many instructional teacher leaders pointed out that, although time was an important and continual issue, it was not something that affected them on a personal or emotional level; the amount of time to work with was simply a finite reality and something they had to work around. Like Anne and Will, the instructional teacher leaders found ways to live within a time sensitive reality and came up with creative ways to deal with time constraints.

Responding to funding and resources issues.

Oh, the political games behind how we use our time and money, and how we use our resources and how we separate our people out. That kind of stuff frustrates me the most! The hoop jumping. (Will)

For the first eleven years of the program, the targeted funding model from AISI ensured that there was enough money and resources to support the initiatives that each district undertook. However, when the funding model changed in the last year of AISI Cycle Four, funding became a major issue. AISI coordinators suddenly had to cope with half of the funding they were used to, which meant making some drastic changes. In Catherine's case these funding cuts meant reassigning the district's part-time lead teachers back into full-time classroom duty and cutting down the number of district-based instructional coaches. As well, the district-based coaches in Catherine's employ would now be responsible for twice as many schools and teachers as they had previously been.

But let me flip back to the year that AISI was cut in half, and so were going into that September, at 50% rate and were coaching 60 or 70%, AISI coordinator plus PD, and with the coaches all having seven or eight schools, it was a Gong Show. And you are just trying to keep ahead of what's going on. (Catherine)

Louisa and Will (who worked with and for Catherine) both mentioned how difficult it was to respond to these pressures around fairness and equity with support; they had built relationships with quite a number of teachers and were busy most days already. They said that doubling their responsibilities meant that many people they were used to supporting would now be now ignored. What made this situation even more difficult was the fact that part way through the year the funding was restored but the district leaders chose not to put the restored funding back into the project:

And then in November, guess what, you get more money. And so even though AISI was given targeted money, and I sat at the table to discuss what should we do with that money and I gave my recommendations, I was ignored and other decisions were made and it was shared with the admin pool at the very same time that I actually learned of it. I did not know this prior to. (Catherine)

However, Catherine, said that she saw the funding cuts as an opportunity. The cuts gave her the license to eliminate those parts of her district's AISI projects she saw as ineffective; specifically work that was being done using the lead teacher model.

For Maria, the AISI budget cuts had a tremendous impact; she said that her new principal reallocated what little funding she had left for other purposes and that she was not given her part-time FTE to support the rest of the staff in implementing inquiry practices; yet, she was still responsible for leading the AISI initiative in her building.

All of a sudden my time was reduced to minimal, and I never saw a penny of the money. But I had a pretty good idea where the money was spent! After I left the school, I was then forwarded an email from that administrator who then said, "So where did the money from AISI go, what resources did you buy?" To which I replied, "I believe you bought a smart board for so-and-so's classroom, and then you allowed so-and-so to buy new textbooks", that is where I believe the money went; because I did not get to spend a penny of it. (Maria)

At the time of her interviews, Maria's perspective on the sudden cut-backs was that, at the end of the third year, the funding for this particular project would have ended anyways. The goal of AISI initiatives was to promote change and make it sustainable, without any continued funding, by the end of the third year of the cycle. So, although it was challenging and even frustrating to be faced with a shortfall in funding, it was just another challenge to face.

Responding to "initiative fatigue".

AISI was predicated on three-year cycles, and for every cycle districts had to come up with something innovative and different from earlier projects. Many districts allowed each of their schools to come up with locally responsive AISI projects, which sometimes led to confusion:

In the first years of AISI we didn't really know what was going on at all, because there was a gazillion different projects going on across the division. And some schools opted in, some schools opted out. (Catherine)

In these early years many of the problems had to do with communication and leadership:

People need to be involved, they need to be connected. I mean when we were telling high school teachers that we were working on high school completion rates, they didn't

really care. They just continued to their own thing. Okay, we will just send in our marks, and you can tell us how many people passed and whether the rates are going up. But nothing else was happening. They weren't making any changes that would influence that we were just collecting data. It was all just about numbers on a page, it wasn't about meaningful change. (Catherine)

In later cycles, district leaders opted for more comprehensive projects that cut across all the schools, but these projects were limited to three years only. Several instructional teacher leaders mentioned the fact that, at the end of each cycle, people who were connected to the current project would feel a sense of loss as the district shifted gears and moved from one instructional focus to another (e.g. "Balanced Literacy" to "Improving Instruction in Math") and from one support model to another. These instructional teacher leaders said that the third year of an AISI project felt "lame-duck" and that the teachers they were working with were already "tuning out", knowing that there would be different expectations the following year. Moreover, as Will pointed out, sometimes the frustrations with the instructional focus and model from earlier AISI projects would seriously handicap any new projects in getting off the ground and in establishing buy-in. Disenfranchised teachers who may have felt that the last AISI project was a poor use of money and had little effect upon their classrooms were skeptical and reluctant to participate in any new projects.

Coupled with frustration associated with the short AISI improvement cycle was the stress teachers felt when they considered the many other initiatives that were emanating from Alberta Education. Over the course of the thirteen years of AISI, Alberta Education launched numerous initiatives that seemed to compete for teacher interest and commitment. There were initiatives related to daily physical activity, full inclusion, adaptive programming, literacy across the curriculum, early literacy, numeracy, FNMI (First Nations, Métis and Inuit) perspectives, assessment, and the integration of inquiry into the curriculum. All these initiatives required teacher input and buy-in. It is no wonder then, that principals and even instructional leaders developed something they began to call: "initiative fatigue":

How many things are you expected to do in a day? How many new things can you take on and yet continue to do, to teach kids the important things? How can you continue to

teach kids to read, to write, and to do math when you got to do all these other things?
(Maria)

Many teachers in our district can feel overwhelmed by the number of initiatives. For instance, I was working with this one group of kindergarten teachers in the school that I was new to and, at the end of the year, we sat down and we reflected and they told me that they were involved in seven distinct initiatives that year. And then you can understand where the hesitation can come from. (Caroline)

Maria, Elizabeth, Catherine, Will, and Charlotte all mentioned how important it was for them in their instructional leadership roles to help teachers navigate their way through all these instructional initiatives. In particular, Maria said that she spent time working with individual teachers to show them that changes their district advanced in assessment (assessment for learning, and outcome-based reporting) and in differentiated education actually supported and closely aligned with the inquiry initiative that she was championing in the school. Maria said that she tried to convince teachers that a quality inquiry project would allow students to choose their areas of interest and could be differentiated on the basis of readiness. Students would also need feedback early and often (assessment for learning) as they worked through the inquiry process. However, not all instructional teacher leaders managed to make this link for their teachers as Maria did.

Responding to management issues.

If I do not adjust my schedule, I cannot do my job. If I do not adjust my routines; I cannot do my job. If I do not figure out what my role is with these people, I cannot do my job. And so it comes to the performance aspect that is huge. That is the way bigger burden that I would carry as compared to things that are not. I don't control the resources and I don't control the money, and I don't control the time and I cannot evaluate you. But I have to do all those other things to do my job. (Elizabeth)

While many instructional teacher leaders said they did not see the kind of issue that Elizabeth lists above as a serious challenge (the kind to keep you up late at night), they did acknowledge that there were certainly challenges related to managing their time to provide an appropriate level of service. For some instructional teacher leaders there were concerns about whether they were being equitable with their services. Were they being fair to every teacher in the school? Did they get out to certain schools more often than to other schools? Other instructional teacher leaders, like Will and Catherine, said that management and

equity issues troubled them initially but they eventually settled on the mantra “work with the willing, if they’re willing to work”. These two instructional coaches said that it was not a matter of providing equity, it was a matter of responding to demand and making sure that teachers and schools were aware of the opportunities provided. As Will said, if teachers did not take advantage of these opportunities, that was their loss.

Mary, Charlotte, Caroline, and Jane said that the most challenging management issue they had was balancing their responsibility as instructional coaches while leading and facilitating a new literacy benchmarking system for their district at the same time. In addition, all seven instructional coaches had to weigh the needs of teachers in two or more schools, schedule their time accordingly (allowing time for travel and time for reflection), and keep up-to-date (with the research) themselves through professional development.

Another significant management issue for many instructional teacher leaders in this study was the challenge of collecting data and writing annual reports to demonstrate to Alberta Education that the funding allocated, the strategies employed, and the personnel involved were actually having a direct impact on student engagement and achievement. Will said that he hated writing annual reports; he knew what he and the rest the instructional coaches were doing in the schools was making a difference for kids but he also knew that these differences were hard to quantify in terms data based upon standardized assessments. As such, Will reported that when he, Louisa, and Catherine (and the rest of the instructional coaching team) sat down to write these reports there was uneasiness and frustration. Will said that often AISI coordinators and their instructional coaches felt the reports compelled them to overstate their efforts and embellish their accomplishments. Will said that these writing sessions made him want to go and take a shower right after so that he could wash the “ickiness” from him.

Responding to Relational Challenges

This person knew that they were weak, they had been identified, but when you actually spoke with him, he tried to build himself up. And he would say things like, “But I know I am a good teacher”. And then spend a lot of time trying to justify that, by being somewhat almost passive aggressive in some ways. (Charlotte)

I don't know if she was intentionally being malicious, or felt threatened because she felt very comfortable with the practices that she had, and she really didn't feel the need to change. (Caroline)

For most of the instructional teacher leaders in this study, relational challenges were more difficult to deal with than organizational challenges. Catherine said that “you could always carve out things like time, opportunity and resources” but she felt that relational issues required more effort, practice and reflection. In their interviews, the instructional teacher leaders were quite forthcoming about their relational challenges and related observations and anecdotes about communication misunderstandings as well as confused and resistant colleagues. They also related some ways they chose to deal with these challenges; coming up with creative solutions, using questions and a lens of “professional inquiry”, appealing to data and a “third point”, working in tandem with administrators and directors, or simply ignoring issues and detractors altogether to concentrate on what was working rather than to dwell on what was not working. In the following section I focus on relational challenges associated with: responding to resistance, resentment or jealousy; building and maintaining honest and open relationships; and confronting ineffective practices were major concerns.

Responding to resistance, resentment and jealousy.

In one of her interviews, Louisa related one story about an especially resistant teacher:

Adam was, I hate to stereotype, I really do, but he fits the mold of the person who has been working just a little too long and really should consider retiring. He was bitter about the profession in general. And he was bitter about any kind of change initiatives; “Been there, done that, and I can wait out any new administration. I'll wait out change initiatives.” So that's just what he does.... So for those two years, I would come into the staff room and I would meet with the teachers in the staff room. I liked to do a lot of my stuff in the staff room. For two solid years, I would walk in and Adam would be in the staff room, and maybe it was break time or lunchtime and Adam would say “What the hell are you doing here? You're not wanted!” In a joking way, kind of a joking voice, but not really. (Louisa)

Louisa explained that, over the course of the three-year project, every time she visited Adam's school he continued to make passive aggressive comments, demean the value of the project, and challenge her as to why she really might be in the school. At the same time,

Louisa said she managed to build up a grudgingly friendly relationship with Adam, but only by discussing things totally unrelated to the project. Louisa discovered that Adam was an avid hunter; and, because Louisa's father was also an avid hunter, Louisa could share stories with Adam. But while Adam was willing and often quite engaged in discussions about the kind of wildlife that he hunted or places in which you can get taxidermy done, Louisa said that Adam never once engaged her in a discussion about instructional strategies or anything resembling professional learning.

Adam was just one of many resistant or reluctant teachers that instructional teacher leaders encountered. Catherine shared the fact that, in her dual role as instructional coach and as AISI coordinator and district supervisor, when she arrived at a school, teachers would scatter. They would find excuses to leave the staff room or break from the conversations in the hallway to hide in classrooms until they felt that Catherine had found some poor soul to be her next "improvement victim". However, as many of the instructional teacher leaders pointed out; their work was never intended for these people and, for the most part resistant, apathetic, or skeptical teachers could be ignored. As Will pointed out, building relationships with willing participants and staying "real" allowed the instructional teacher leaders to overlook the naysayers and proceed with their AISI initiative.

Don't beat yourself up. And don't try to get to everybody. Don't try to make sure that the teacher in room six who hasn't seen me yet gets talked to. Just stay the course and let your work and the work that you and your cooperating teachers do speak to those who are reluctant or resistant. Let it be known what you do and work in a public place so that people can observe the process—so they can see it and they can jump into the conversations when they pop in the staff room just before recess or at the end of lunch time. Be real. And just don't beat yourself up if you don't get to everybody or get everything done. (Will)

However, in their interviews, some of the instructional teacher leaders also related anecdotes about teachers who were resentful, jealous, and derisive of the instructional teacher leaders; these teachers were harder to ignore. Will and Louisa mentioned those teachers who said that the coaches were now "in an ivory tower"; other instructional teacher leaders said their colleagues thought "they had gone over to the dark side" or derided them with: "it didn't take you very long to become one of them". Several of the

instructional teacher leaders said that even old friends were suspicious about teachers in a leadership role and that these resentful teachers coveted the “perks” the instructional teacher leaders seemed to have: extra planning time, access to more professional development and resources, a seemingly higher profile in the school or district, and the freedom to make their own schedules and move from building to building and classroom to classroom as they pleased. As several instructional teacher leaders acknowledged, these jealousies were not ill-founded; there were many perks to being an instructional coach.

Well, not having to do report cards is a huge perk. Huge, because right now I’m watching all the teachers suffer. And maybe that’s why everybody’s mentioning it to you. And it’s not because we don’t have drudgery, it is not like we don’t have paperwork, it’s not like we aren’t accountable. But yes, yes, my evenings, to be honest, my evenings are a much lighter load, because I’m reading and researching on the computer, and that is the kind of stuff that you still have to do as a teacher on top of all of your evening planning and whatever. But yeah, that’s a perk that I didn’t actually think about going into this. It is not something I would’ve said “hey”, but yes there are perks. And I don’t have to deal with parents, and that is good too. (Mary)

When instructional teacher leaders encountered resentment (either spoken or unspoken) they often felt like they had to justify their existence and to defend the leadership’s decision to offer the placement to them rather than to some of their colleagues. However, as several instructional teacher leaders pointed out, going on the defensive was not productive. Instead these instructional teacher leaders suggested that there were other ways to deal with collegial resentment. Mary suggested redirecting attention back to the project and to the students and what could be done for the teachers who were questioning them. Louisa said she made sure not to draw attention to the perks coaches had but instead talked about all the reading, research and reporting obligations she now had. Elizabeth asked resentful colleagues if she could visit their classrooms or find other ways in which she might gain their involvement in the project and she told these colleagues that they had much to offer the process (This would often scare resistant teachers off.). As well, most of the instructional teacher leaders, like Will and Louisa suggested earlier, tried to ignore the little “digs”, get on with the work at hand, and concentrate on colleagues who were not resentful but were open and invitational. Caroline explained how she dealt with resentment:

When I first started as a lead teacher at the school level, there were people in the building who questioned the fact that I was out of the building so much. “Why is she so special, that she doesn’t have to be in the building so much?” If the question was directed straight at me, I addressed by saying, “Here is what I am doing, here’s what I’m hoping to accomplish, and here’s what I’m doing so I can do all of that. If you would like to come and be a part of this, by all means, let’s go make that happen!” And quite often they would shy away from all the extra work that would be involved. Gossip is gossip and it is going to happen and the staff room was not really a place that I hung out. My lunch hours were better spent with the kids. (Caroline)

Responding to poor practice and providing hard feedback.

You can’t just tell someone you are an idiot and you’re doing it all wrong, although very often—you would like to. Because, you know you just can’t do that. (Anne)

...sometimes you see a classroom that is just going haywire, and it doesn’t matter if you built the greatest lesson plan in the world; if the teacher’s management is off they are not going to get anything done. And we struggle with that on our team because we have so much invested in choice, and with the teacher setting the goal, so if the teacher doesn’t say to me “Louisa, oh my goodness, they are running around like crazy; I just can’t manage them. Can you help me?” If they don’t ask for that help, it is hard for me to bring that up because they haven’t requested that. (Louisa)

As suggested by Mangin and Stoelinga (2011), one of the most difficult challenges for an instructional teacher leader is to provide hard feedback. When asked, most of the ten instructional teacher leaders in this study confessed there were times when they withheld critical feedback, ignored or tolerated ineffective practices, and downplayed their own expertise and experience in order to maintain a working relationship. The instructional teacher leaders suggested that “fierce conversations” could only happen at the appropriate time and, when you are just getting into a classroom and just getting to know a certain teacher, it is never an appropriate time. In one interview, Caroline described this tricky negotiation and why it was so important for an instructional teacher leader to remember their role and mandate in the change process:

So you withhold the hard feedback at certain times until you feel that they are ready for it. And it has to do with relationship building and trust and all that kind of stuff. There is a place for fierce conversations though. But there is also way to go about having those fierce conversations, because, our perspective on coaching is that it is not evaluative. And that is our team mandate; our coaching is not evaluative. We will not be used; we will not be leveraged by principals—to fix. So any enhancement opportunities that might be there—need to be approached carefully. (Caroline)

Jane explained that “soft-peddling” was sometimes required and that instructional teacher leaders needed to be cognizant of exactly why she was in the classroom (and put aside judgments about classroom climate...):

Absolutely, I would say that, by not speaking to things that I have seen, I have felt like I have almost been condoning the behaviour. That said though, you have a purpose in mind when you are going into a classroom. There is a purpose for that, whether it be,— and that’s required—whether it be in a non-evaluative role. So you have to be able to go in with that focused attention on the task at hand, on the four students that you are going to be observing in that Language Arts class and you have to keep it focused on that. (Jane)

Anne suggested that confronting poor practices took a bit of tact and that she could get to the point in a round-about way:

I try to approach it casually, like on a prep or on the lunch hour or so, and I just tell a story about what happened in my class, and then sort of just turn it over to them, and ask “What do you do?” And kind of put them on the spot to have to respond. And then I will say, “Yeah, well I really don’t know about that...”, or “That is certainly not how I would do it...”, and then usually they want to tell you more. Or, another sneaky way is, get another teacher to do it.

... I might be able to find another teacher who has a better relationship with that person, to go in and say something like: “You know that you are really supposed to be doing this. And you are not. Can I help you do it? Or do you want to come and see what I am doing? Or can I send you some stuff so you can look at it?” I have kind of had to have a few other colleagues deal with reluctant colleagues so it wasn’t coming from me. So sometimes I have to be sneaky. But I still get it done. (Anne)

Several instructional teacher leaders were a little more direct in their approach, specifically Elizabeth and Maria. They were experienced teachers and, because they were appointed as lead teachers in their home schools and had already built relationships with individual staff members; there was no need for a “feeling out” stage. In her interviews, Elizabeth called herself a “straight shooter” and confessed that: “I have never downplayed my knowledge and I have never sugar-coated my responses”. However, even Elizabeth confessed that, over time, she softened her approach and learned to give cooperating teachers time to process:

What I have learned over time is that I'm very fast, I'm a very quick responder; I can retrieve the information quickly and spew it out. What I have learned is to respect that not all adults can do that. (Elizabeth)

But what I have done and changed is that I have a new respect for the amount of time that it takes some adults to process this new information and form an articulate response. (Elizabeth later in the same interview)

And I would always wait like a week or like 10 days or whatever to respond, so they had lots of time and if they needed more clarification my door was always open. (Elizabeth later in the same interview)

The instructional teacher leaders pointed out that there was no perfect way to teach and, as an instructional teacher leader, they needed to acknowledge different contexts, teaching styles, and teacher personalities. That said, as educators and as leaders in their schools and districts, they said they had an obligation to uphold the teacher quality standards and protect children:

[I would not confront them] unless it crosses the boundaries of the teacher quality standards; our obligations as professionals. So if I see a teacher yelling at a child or if it becomes unsafe and the children are being harmed emotionally or physically or anything like that; then I would have to step in. (Jane)

In the interviews I specifically asked the instructional teacher leaders to volunteer recommendations on how to confront poor practice, give hard feedback and engage in fierce conversations. Will said that it was important to establish norms and set boundaries from the start:

My solution to this problem is to have clear parameters at the beginning. And to discuss with teachers and say "Our process will be to attempt to change or impact this need that you see in your students. And we will use these strategies or this approach in your class." and "What are our big goals what do we want to see?" So we spent time talking about that. We spent time talking about what about the "what-ifs" and the "have we thought about"? (Will)

At the same time, both Will and Charlotte advocated for instructional teacher leaders to "take risks" and allow your own practice to be examined (perhaps even critiqued) by the cooperating teacher.

I would say having no fear, and participating in shared risk-taking. And I would say that some of the best experiences that I had were where I failed miserably. And my colleagues recognized that I was just a teacher, just like them, just as fallible. It was important for them to see that I was willing to put myself out there and to be the first to try the strategies. And I think that did a lot to build relationships. (Will)

This practice of “shared vulnerability” made it easier for the instructional teacher leaders to discuss poor practices. The teachers came to see the coaches and lead teachers as equals and not as supervisors.

Mary related one anecdote where she damaged her relationship with a teacher by being a little too frank and pushing this teacher about his over-reliance on lectures when she knew he was already upset and defensive. She said that the damage took weeks to overcome; the teacher would not speak to her or even acknowledge her for close to three weeks. When they eventually did start talking, Mary apologized:

... it was my fault; I stepped over the line. I could have said that exact same thing to one of my other teachers and it wouldn't have been a problem. We would've had a conversation about it, but I should have known that you cannot say that to **this** person. Not at **that** time. And I could probably say that to him now, maybe if I said it with a bit of a smile. But I shouldn't have said at the time. So that was a big faux pas. (Mary)

Mary's realization and her attempts to restore the relationship by apologizing and taking the blame, showed a different kind of vulnerability, but it also showed courage.

Caroline said that when confronting poor practice and facilitating hard conversations, it was important to focus upon what the students are experiencing and learning and not on the teacher's competence or delivery. Ask students to share what they experienced from the new approach. She also suggested that instructional teacher leaders should not be afraid to celebrate and draw attention to the positives:

As educators, we are our own worst critics; we can't just keep on saying: “This all went well, and this didn't!”, and we are going to dwell on our mistakes until we can fix them. That is what is going to drive us, and that is the piece that we hang onto, but then all those things up there, all those amazing things, we tend to forget. Sometimes I think we only look for what's going wrong, instead of what has gone right. But part of coaching I think, is going to be a philosophical shift in looking at a strengths-based model.

Several of the instructional teacher leaders (Most notably Elizabeth and Maria) suggested that the best way to confront poor practices and facilitate hard conversations is by using artifacts (student work, recordings, lesson plans, etc.) as discussion points and

asking teachers to explain what they see as they examine them. Maria wanted to see “proof” of their understanding.

Like some teachers would say to me, “Like, I am already doing that.” And I would say “Well then show me an example”, and then they would show me an example and I would say “Look you are on the right track but you are not completely there. But you are on your way. If you just tweaked this a little bit, and the way that you ask these questions over here - you would be almost there. But you are definitely on your way.” You have to be able to point that out to people. (Maria)

But while Maria both pressured and encouraged her teachers, Elizabeth was not afraid to be blunt:

I am okay to say to that teacher, “Your evidence does not match what you have got on paper here.” Because I have the data! I have done my homework and my director has prepared me to have that conversation. I also have support from administration. If I started sugar coating things my administrators would think that I had a stroke or something. It is not who I am. But there are lots of people who are not me.

None of the other instructional teacher leaders were as confrontational as Elizabeth confessed that she could sometimes be. Elizabeth felt very secure in her position and well-supported by the leadership, and she had very clear ideas about what constituted effective practice.

Summary

Responding, the third adaptive and iterative process instructional leaders needed to negotiate, was perhaps the most challenging and personal of the processes. The first two processes, Clarifying and Engaging were focused on getting ready for and embarking on meaningful interactions with teachers and students. These processes required vision, commitment, planning, and a certain amount of risk-taking. Responding required instructional teacher leaders to adapt and respond to pressures related to organizational constraints (time, funding, resources and institutional demands) and relational issues (reluctant, resistant or openly defiant teachers). This process challenged the instructional teacher leaders to employ diplomatic skills, problem solve, seek support, and even ignore some difficult criticisms. If instructional teacher leaders responded in the wrong way (too defensive, critical, or dismissive) they could seriously jeopardize their projects and cause long-lasting damage to their district’s instructional and relational environment.

The next chapter focuses on the fourth process: Reflecting. Reflecting involved the *considered* examination and analysis of incidents and actions in order to make necessary adjustments. Many of the adaptations made by instructional teacher leaders when they clarified, engaged or responded were spontaneous or reactive in their nature. When these educators encountered a challenge, they were quick to adjust. However, there were times when quick responses were inappropriate and may have led to superficial adaptations; adaptations that satisfied both the teacher and the instructional leader but failed to move the project forward in any meaningful way. At such times the lead teachers and instructional coaches were better off reflecting in more deliberate and considered ways; distancing themselves from the work and asking questions that brought them back to their original mission and mandate.

Chapter 8: Reflecting

The fourth process is reflecting. Reflecting is different from the other adaptive processes in that, while the other three processes require the instructional teacher leaders to adapt for particular purposes (to clarify, to engage, and to respond), the process of reflecting is different. Reflecting involved the considered examination, analysis and action, often in response to critical incidents (Driscoll and Teh, 2001). When a lead teacher or instructional coach reflected upon an interaction or occurrence, they had to think about precisely what had happened, consider how they felt about the situation, analyze and evaluate how their actions impacted those that they worked with, and come to a better understanding of what could be done to improve or enhance the situation (Gibbs, 1988; Grant & Zeichner, 1984). As such, reflecting is more than just reacting or responding; it involves introspection, contextualization, consideration of alternate viewpoints and it will often force the instructional teacher leader to consult with other colleagues or review literature and research (Schön, 1983).

So reflecting is an integral part of all three of the other processes. In order to effectively clarify their mandate and roles, engage teachers and students, or respond to organizational and relational challenges at critical moments in the project, the instructional teacher leaders needed to reflect on why they were involved in this work and how they might best go about it. As such, while there may be some overlap between the first three adaptive processes, (which made it challenging to analyze and code the transcripts) the process of reflecting could almost be included as a subsection in the other three. In fact, there were times during the research process when I considered dropping the reflecting process altogether and to include clarifying, engaging and responding as the only three adaptive processes.

However, at the same time I was also becoming more and more convinced that reflection was, in fact, the most important of the adaptive processes and needed to be viewed and studied as a separate phenomenon. Reflection, as an adaptive process, often happened shortly after a critical event or interaction and it allowed the instructional teacher leader to make critical adjustments as a result of their reflection. An example of

such reflecting might be found in Louisa's description of her need for recognition and ownership was actually interfering with her satisfaction in working as an instructional teacher leader. Here is a portion of what she related on this topic:

So then I get into this coaching gig, and so then I have to do planning the teacher's way, if that makes sense. I mean I'm bringing some ideas but it is their stuff, their planning process, and they have ownership. It is for their students and they make the decisions. And that's in my work with teachers and then, here with the team when we were planning for the AISI conference or when we were planning to write reports or when we were figuring out a strategy to work with schools, I could never own any of that either. We did it all together. And it should have been that way, and all of our projects were better because we did collaborate, but I lost a sense of personal ownership, and to this day I still feel that loss. It's hard to, in this work, to find something that you can own. And that was huge for me. And aside from all the relationship stuff, and difficult personalities that were really hard at the time, it wasn't nearly as significant as that loss of ownership.

So over the last few years I have learned to deal with this in one sense, but I've also been trying to find opportunities to do little pet projects that are mine. I can look into something, or dig deeply into an area, so like when I emailed you about the "focus group" stuff it led to an innovation project that I did this year. And it went really well. And I wrote the report, and I designed the meeting framework, and I took care of all the logistics and brought the students and teachers in, and I presented it to the admin and that kind of thing. And so, it felt good to have that ownership. And I don't think I realized that I should've found those little opportunities right from the start. I just realized that I was missing it, but I didn't really think to create those opportunities. So now that I've been doing a little bit more of that the last couple of years and it has been a little bit easier. (Louisa)

In the example above, Louisa reflected upon her growing sense of unease. She considered what was happening and how it was interfering with her ability to find satisfaction in her work. While she said she felt guilty about needing the spotlight or something to call her own she knew that, if she left these feelings unchecked, she might disengage from what she considered very important work. To address the situation, Louisa approached her AISI coordinator, who then gave Louisa the opportunity to take on smaller projects she could do by herself, whether it was creating example lesson plans, taking on an individual project, or making individual presentations at conferences. Louisa's act of reflecting allowed her to continue her work as an instructional teacher leader; she could feel validated by the work she did as a team member and as a support or coach for teachers

in her district while at the same time feel validated on a much more individualized and personal level.

Reflecting While Leading for Change

In their interviews, the ten instructional teacher leaders shared pivotal moments in their leadership experiences when they remembered reflecting on the direction of the project, the effect of their work, and the need to make significant changes to more effectively lead for change. These reflective moments may have originated while the coaches and lead teachers were working with teachers, while they were driving home from work, or while they were discussing their work with friends or family. The reflective moments they reported were often related to the three adaptive processes discussed earlier: clarifying, engaging, and responding. However, the reflecting they described was much more involved than the minute-to-minute adjustments and adaptations that had to be made as they championed their projects. The reflecting they shared had more to do with making *significant* adjustments in how they completed their work, where they ultimately focused their energies and whom they eventually worked with.

Reflecting while clarifying.

Louisa's account of how she considered and acted upon her need for recognition is one example of how an instructional teacher leader used the process of reflecting while clarifying her role and job-related expectations. Louisa needed to be sure that, as she created and shaped her role and identity as an instructional teacher leader, she left enough room for personal validation. She did not want to disappear.

Will, Louisa's colleague, also shared a significant moment of reflection when he finally confronted his resistance to the call of leadership. This moment has already been touched on in chapter five where I shared the passage when Will, in the midst of shoveling snow, proclaimed "Why not me?" In another passage Will further explains how he worked through this reflecting process:

When I was at the school level, from a teacher's point of view, I knew I wanted to do something; I wanted to kind of grow as a professional but not in that way. I didn't want

to start a Masters so I could become a principal. I didn't want to follow that route. I wanted to do something else. Later I found out it was called distributed leadership; this whole idea that you can actually be a teacher leader in your building. How does that look? And that really appealed to me because the idea of being a mentor to teachers really appealed to me. I was confident as an educator; I mean if I can survive in a busy junior high I can survive anywhere. So I thought I just want to be that for other people. (Will)

Like Louisa, Will had to reflect on his needs and weigh them against the needs of the students and the district; this allowed him to clarify what he would be taking on when he opted to become an instructional teacher leader.

Reflecting while engaging.

In his interviews, Will shared quite a number of instances that showed how he used reflection to adapt and adjust and move the project forward. In the following transcript excerpt, Will explains how he came to the conclusion that working in a public space with a teacher who is respected on their staff can establish interest and buy-in from the rest of the staff:

I remember another case where I was sitting in the staff room working with a vice principal, on his Biology 30 project. He was great, he was really into it and yet he was a division four guy, and he is the VP in the school. That says a lot right? And in walks a teacher who barely gave me the time of day. He's in there waiting for the coffee to brew and he's leaning against the sink just sort of listening to what we're talking about, as we are planning. And then he jumps in to our conversation and offers a suggestion. And he makes another observation about something and we say "yay!" And then he comes and actually sits with us for 10 minutes, and off he goes. And the next time I emailed the staff, he emailed back: "Hey, do you have time for you and me to sit down together?" And I emailed back "No problem, sure!" And it was that, where it really crystallized for me, the whole process of what it means to be a coach and how you can really build a relationship. And I said "Okay now I get it, I get the pieces and how they work." (Will)

When Will shared this example, he was discussing how challenging it was to get things moving in his district, especially in light of the invitational nature that the district coaching model was using (as compared to the model in the other district that involved matching teachers and coaches). Happily, for Will at least, he stumbled across a way in. And so, after reflecting on the experience and what had happened in that one staff room, Will

went back to the district AISI team and shared his strategy: find a positive and influential staff member to work with and then work in a public area.

Another example that Will shared was how he and the rest of the district AISI team came to the conclusion that they needed to bring along a substitute teacher when they came to work at the schools.

And it wasn't until Christmas in that first year, in December or January, when we said to our coordinator "We're just not getting any buy-in. Is it okay if I would just bring a substitute out with me? You know, because people just don't have time." And she said "You know, let's try that." (Will)

This decision was made after Will and the others had considered what was currently happening: teachers were unable to find the time to work with the instructional coaches and were hesitant to invite them into their classrooms without getting to know them first. The situation was frustrating and the coaches said that they often felt like unwanted salespeople in the staffrooms of their district. When the team found the funding to provide substitute coverage, some of the barriers were cleared away and the coaches had an easier time engaging faculty in discussions, collaborative planning and, eventually, coaching in the classroom.

Reflecting while responding.

The instructional teacher leaders also used reflection when they responded to organizational and relational challenges. This kind of focused reflection is evident in the following excerpt from Mary:

And so, I had one partner teacher in the beginning, and so this is the thing in September, my partner teacher had, he had been a junior high teacher but on a temporary contract, and he had taken over my fourth grade class, when I stepped out for this secondment. So he was new to grade 4, trained in secondary education, and so was totally lost and panicked. He knew what he wanted me for; he wanted me to help him survive grade four. So he wanted my materials - he didn't want coaching; he wanted stuff. And, I lent him my stuff, and then I said, "And now we should have some conversations about what you are going to do with this stuff!" (Mary)

In this case Mary was faced with a challenging partner teacher. She said that he had been assigned to work with her and he was willing, as long as she gave him “stuff” related to his new teaching assignment. Mary chose to give him the materials. I asked her why she did so. Mary explained, that after some reflection she decided she should share some of the “gems” from her days in teaching that grade level; this would help build some equity with the teacher.

I didn't give it all to him; I only gave him the gems. But still, the actual practice of how to teach literacy for example—he was a Social Studies specialist—he had no idea what to do with literacy. So we started with the very basics, the very basics. So that was a good place for us to start actually because he wanted me there, but that was just too simple. (Mary)

Mary's relationship with this teacher was further complicated when the teacher was moved back to a secondary teaching position and no longer needed Mary's “stuff”:

So my partner teacher ended up teaching in Junior High again. And I had to continue working with him, which was fine and great, but now he didn't know what to do with me. Because he didn't need the same way he thought he did. And, he knew that I am one of these elementary people, and he was a junior high person. So we had a little bit of, “Look I still know how to teach”. It was like starting over all over again. And, although he was a young teacher, he was very secure in his knowledge of how to teach, and he wasn't all that sure things needed to change. (Mary)

Mary explained that her interactions with this teacher took a great deal of reflection and problem solving. She had to consider how best to approach the teacher, what to work with him on, when to push him and when to back away. At the time of our interviews, Mary confessed that her work with this teacher was continuing and that progress came slowly:

But, it is a success story in that he is much more open to it [coaching] now. It just took a little longer to get to those conversations; those hard conversations. And still I had to do a lot of soft coaching with this particular individual because he is just not comfortable with that [critical feedback]. But we've had a lot of progress; his eyes are much more open to what things can be done now.

Reflecting as a Team

On a regular basis, Catherine and her team would reflect and re-dedicate themselves to the mandate of their project; they would revisit their goals, discuss the targets they had set, and talk about whether the strategies they had been using to reach teachers and change learning were making a difference:

Our staff meetings were not minutia—we can write that out: here’s the information. But here is what we need to discuss, here are the big questions, that’s what is needed to be brought forth. And it was heated discussion.

So it was always reflecting on what our goals were, for the year, disputing it, and asking a question: well why are we doing this? To what end? What is the ultimate purpose? And keeping that purpose and intent behind everything that we do: that helped keep us on track. (Catherine)

Catherine explained that she and her team persevered because they were committed to the project and to the reforms they were suggesting and they took time to reflect on these. Catherine said that she and her team (which included Will and Louisa and several others who were not interviewed) were committed pedagogical changes with regard to assessment, differentiated instruction, and inquiry had the potential to make a major difference for students and teachers and that they were ready to tackle the hard issues. In their interviews Louisa and Will corroborated Catherine’s account. Will in particular, characterized the team meetings as forums to engage in brutally honest reflection:

You have to put aside your ego when you work with a core group like this. A lot of what we do is vetted. RTS; rip, tear, shred. Because our processes are, “Please make this better.” And we learn a lot that way. And we are real sticklers, and that’s what made us better as a coaching team. Some people have that ego and can’t handle that. (Will)

The four other instructional coaches (from a different district) also mentioned a similar process. They said that it was important to remember why they were engaged in this work and to remember they were a team. They also said that it was important to have a safe place to discuss sensitive issues with sympathetic and understanding colleagues who also understand what it is like to be between two worlds (neither a teacher nor an administrator):

So this learning coach network [division team] that we had with the learning coaches was essential not only for my survival, which it really was, but just to keep really focused, and positive, and driven. Because it was disheartening at times, you know—

you're not a part of this, and you're not a part of that, and just where are you? I am not that independent. I do not want to be; it is not my personality. I want to be part of something where I work with somebody else. So for the first few months, or at least till after Christmas, it was really challenging to feel like I was a part of something larger. But then again I'm not a teacher; I'm still not a teacher. They [the partner teachers she was working with] still don't see me as a teacher. (Mary)

Summary

The fourth and last adaptive process that I have suggested instructional teacher leaders experience as they fulfill their mandates as change agents was Reflecting. This fourth process was different from the first three in that it cut across all aspects of the instructional teacher leader's task. When instructional teacher leaders needed to make significant adjustments in order to effectively clarify their role, meaningfully engage teachers and students in school improvement work, or thoughtfully respond to organizational and relational challenges, they often found themselves engaging in a very deliberate reflection process. The instructional teacher leaders were required to look at the critical event or issue and from more than just their own perspective and consider the needs of the project and others involved. They also had to consider their own feelings and how those feelings may be impacting the circumstance. Then, after weighing the options and possibly after doing some reading or consulting with others, the instructional teacher leader had to make a decision, one that might significantly impact their ability to lead for reform. In their anecdotes, the instructional teacher leaders revealed that they did go through such reflective cycles, and that they sometimes did this collaboratively.

The next chapter deals with some of the data from the interviews that did not fit neatly into the adaptive process model. The chapter presents a summary of what the instructional teacher leaders shared regarding: the need for personal and professional validation; the requirements of the various stakeholders; and the difficulty in assessing and describing progress and failure. The chapter also includes recommendations from the instructional teacher leaders regarding the optimal climate for instructional teacher leadership.

Chapter 9: More Perspectives on Instructional Teacher Leadership

While the Instructional Teacher Leadership Adaptive Process Model allowed me to conceptualize and explain the kinds of adaptations and adjustments that instructional teacher leaders work through, the model was not comprehensive. In their responses, the ten teacher leaders had much to share that did not fit neatly into my model. This chapter includes participant assessments, reflections, and perspectives about aspects in their teacher leadership experience that could not be described as adaptive process.

Much of the data for this chapter came out of the fourth interview, when I asked the participants to share their perspectives and wisdom about instructional teacher leadership and to appraise their efforts and the legacy. Specifically, this chapter will present a summary of what the instructional teacher leaders had to say about: how they found personal and professional validation; how they met the requirements of the various stakeholders; and how they assessed and described progress and failure. The chapter also includes some of the recommendations that the ten instructional teacher leaders gave regarding what they felt would be the optimal climate for instructional teacher leadership.

Finding Validation and Feeling Encouraged

I have really loved this job. And I think it's because I can see the results. We had a conversation and there is a direct change. And I can see those changes. And that is exciting to me. And you can see the kids, when this little tweak happened, and it was presented this way instead of being presented the way it was before, the kids are engaged, the kids are excited, and hopefully kids are learning more....You just get goose bumps! (Mary)

The most satisfying part for me was at the end of the year, when I would videotape the teachers, and I would make that movie and I would replay that movie, and I had just such a positive sense, and for me that was affirmation of what I was doing. I can really see evidence of what the project was doing, and really, more importantly, of what the teachers had done for their students. That was always a big "aha" moment for me. (Maria)

All the instructional teacher leaders said that they felt personally validated and encouraged when they considered what had been accomplished based upon their individual and collective efforts in working with teachers and students. Charlotte shared

that she sensed things were well done when she visited classrooms where her advice and the strategies she shared had made a significant difference for the children in that class. She said she could see, in the engagement of the students and in the reduction of off-task behaviour, that *she* had made a difference.

My grade 3 teachers, who were struggling with a particular student, showed me a little portfolio, this was a while ago and it was portfolio looking at shapes and whatnot, and a little child had created, and the student had created like a model of shapes like a robot and they showed how it was working. And they had covered all the outcomes in his artwork book. Just by letting go a little bit in trying it like this. And so that was huge. And so I've had a lot of those experiences. And that's why I'm so enthusiastic because I have seen it work, these behaviour management kids in this classroom that I went into the modeling for, and I was nervous, I was so nervous, and these kids were doing silent charades, kids who were unorganized kids who never stopped talking—blah, blah, blah, and they were so into it and then I could high-five them in the hallway. And these were kids I barely know. And so I had so much fun, and the kids had fun. (Charlotte)

As a practicing teacher who was constantly trying out the strategies she was suggesting to the rest of her department team, Anne said she was in tune with what her students needed and experienced as she championed her improvement project. Anne intimated that success for her as an instructional teacher leader was very much linked to the success of her students.

Because I am here for the kids, right? The teacher part is a side benefit, but if everybody hated me and it was just me and the kids, that's really what I'm all here for anyway. (Anne)

Well, hopefully it shows up in the June results on the written part of the diploma. But in my own classroom, we were really into the project and they appreciated and they liked it and they felt that they were becoming better writers because of it. So I felt like "Okay I didn't do all of this!", and they were like "Oh whatever, we can take it or leave it." They really got into it, and they seemed to really take to it, and it seemed to be working, and they had more confidence about whether it was actually going to work or not—going into that diploma exam. (Anne)

Will was also outspoken in saying that his success or failure as an instructional teacher leader was linked to students' engagement, growth and achievement. He said that the most fulfilling part of being an instructional teacher leader was when he could see that the kids were excited and were making connections. Will related examples when students used transfer thinking and application to understand more about text features in paper

copy textbooks and on webpages. In his interviews, Will described a social studies unit where students had made a study of local architects (in this case Douglas Cardinal) and how they came to recognize and appreciate particular types of architectural design. He said that the success of the students in their learning gave him a feeling of success.

And what we found was that we went deeper and after several weeks we still hadn't gotten off of Douglas Cardinal yet. We prepped about 15 different builders for the students to look at, and we didn't get to any of the others. And so I asked, "So what gives? Are we just slow or are the kids having difficulty understanding?" She said "I can't stop the conversations. They are fantastic conversations. Those kids are using the tools that we gave them this year to break down the textbook and to find evidence for something that they are thinking." And this is a phenomenal skill for fourth grade kids. (Will)

Maria said she felt a sense of personal accomplishment when she could see that her colleagues were beginning to use and understand what she had been featuring at their staff meetings and in one-on-ones.

I think the one that made me happiest was when I was working with the science department, and a couple of the science teachers who, you know when it all started they were like, "Oh my God, are you kidding me?" And then, after the first year, we really got into it and I did those mini-lessons with the staff. You know those science teachers were the ones who said "I can use this, I can use this, and I can use this." And then I would follow-up with them and I would ask them "did you?" And they would say, "Yeah I did, see, see, and see." And I was like wow! And they are the ones that I think got it the most. (Maria)

Catherine also mentioned seeing teachers practice what she had been working with them on:

I would say the sheer excitement and joy in teachers trying something they have never tried before and feeling that it was powerful for them and for their kids. Seeing the sparks that fly. That's where the big fireworks happen (Catherine)

Charlotte said that her need was not only to engage the students, but also to engage teachers. She said that she came across many classrooms where the students seemed unengaged and the teachers were just as unengaged:

So it's about empowering our teachers to want to teach, and about getting them to have fun in their jobs, as well as what is best for the kids. And I mean, every kid in the class, not just that one child. (Charlotte)

Like Catherine, Charlotte wanted to see “fireworks” in the classroom. Caroline explained it in a slightly different way; she said that her validation came when she could see that teachers were starting to “own” the instructional change. She related an example of when Division One teachers (kindergarten through grade three) started to differentiate their instruction in response to the needs of the children in their classes rather than to simply following the program they had always followed. This change meant handing out different and leveled take-home readers, and providing the students with different word lists depending upon their readiness. Caroline said that seeing such a major and well-thought out change gave her validation as an instructional coach.

Elizabeth shared another story about a teacher who was initially reluctant and resistant to become involved in the kinds of instructional improvements that Elizabeth was championing. In her interview, Elizabeth was careful not to attribute this teacher’s transformation to any one thing or any one conversation she had had with him and she said she realized that much more was going on in terms of the work being done across the district. However, Elizabeth said she felt great satisfaction in the fact that this teacher she had been working with had made so much growth:

At the beginning of the year he was probably rolling his eyes about. When I mentioned these [innovations] coming someday he would turn his head; he was not open to this. But sitting at that meeting, he was totally supportive of it, he was: “Okay, I can see that.” And he wrote down notes, “I want to do this, I want to do that”, and it was a total change over from six months before that. And I was just heavenly happy, and again not because of me, it was not because we had had a deep conversation one day, but it was through his experiences this year, and I’m hoping that I was a part of it. (Elizabeth)

Other instructional teacher leaders related similar stories, stories about teachers who were seen as marginal by their administrators and many of their colleagues, but who, with a little encouragement and support, had become much more effective in the classroom. Several of the other instructional teacher leaders talked about having a legacy after the project was finished. Although often attributed this instructional legacy to the work of the team, the constant use of the pronoun “I” betrayed the fact that, for these instructional teacher leaders there was a need for a sense of personal accomplishment; Louisa was not alone.

Caroline shared one validating experience from several conversations with a principal and a group of students. In this case, Caroline said she had been working a

teacher who had made marked improvements in how she was teaching and engaging students, and the principal and the students also observed this:

The transformation that they noticed in their teacher and in the things that she was doing and in the ways that she was teaching and how they were now excited to go to class and how much they loved what she had been working on and doing, and they did not realize that those shifts had happened as part of our professional conversations. And that was satisfying. And when I sat down with that teacher, and could look at those responses with her, and she could feel that she had grown this much and that her students had been able to see it as well, it was even better. (Caroline)

Caroline also said she felt validated by the changes she could see happening in her own classroom; she knew the work that she had been doing in her instructional leadership role was also making her a better teacher.

Several instructional teacher leaders, in particular Catherine, Elizabeth, Karen and Louisa, said that they gained validation and encouragement when they reflected on the noticeable ways in which changes they had implemented made an impact across their school district. Catherine talked about the satisfaction of having powerful conversations at the district level; conversations about essentials in teaching and learning. She said these conversations often happened when the instructional coaches were together but that they also happened when groups of administrators would meet together. Elizabeth talked about the excitement of having instructional change come not only from the top down but also from the ground up. In her interview she explained how important it was to have people in leadership positions at the district level who understood the nature of instructional change and who would champion the work being done by the instructional coaches and lead teachers. Caroline talked about hearing of and engaging in similar conversations in different schools across the district. When we discussed this, Caroline described the power and the depth of conversations that were being had when her district pulled together groups of teachers in targeted subject areas. She said that not only did these educators discuss their subject area content but that they also talked about how they approached the content using many strategies and approaches that were championed by the instructional teacher leaders. As a personal aside, Caroline shared the fact that she could see many changes happening in her own daughter's classroom; although she did not work with her daughter's teachers, Caroline said that she could see that changes were obviously

happening in classrooms outside of the designated school improvement pairings. Caroline even saw validation in the fact that I was completing this study:

It's even fulfilling to have you be here to listen to our stories. Because out of all of this, hopefully something will come that can build upon all of this, the next big thing for Alberta [post-AISI]. (Caroline)

Meeting the Requirements of Various Stakeholders

Considering stakeholders and accountability.

One chief question instructional teacher leaders came back to time and time again while they were doing their work was “Who am I doing this work for?” This question was important when they were going through the process of clarifying their roles and positions (chapter 6) and it took on a special significance when instructional teacher leaders reflected on their work. In some ways, the question could be written: “Who am I *really* working for?” or “Am I working with and for the people that I had originally intended to work with?” Although most project plans asserted that lead teachers and instructional coaches were to make a difference for students, the instructional teacher leaders spent the majority of their time working with teaching colleagues. As was mentioned in earlier chapters, I asked the teacher leaders about this apparent contradiction and almost all instructional teacher leaders explained (in one fashion or another) that their focus was always on the students, even while they worked almost exclusively with teachers. By helping teachers become more skilled and confident, the students would ultimately benefit. Skilled and reflective teachers would be able to address instructional issues related to student engagement and achievement.

Well I think, because the role and responsibility was to work with teachers, for that role then, the focus would have been on the teachers. Of course the goal, the overall goal, was to improve critical thinking with the students, but my main role was working with teachers. So I think that it had to be with the teachers. (Maria)

Moreover, as Charlotte pointed out, the work that coaches and lead teachers did with their colleagues should really promote enjoyment for the teachers. Charlotte was especially vocal about this; she said that teachers who rely on routines and go through the motions were not getting full enjoyment out of their job: it was like eating macaroni every

day. Charlotte said that she felt it was her job to push the teachers, to show them new and innovative ways to engage their students, and to put the fun back into teaching and learning.

I just don't get why we say teachers have to teach like this or that. In our schools, and even now I'm watching some of our young teachers come in, and they are so fixated on the textbook because it's easy, it's easy, but how enjoyable is it, how enjoyable is it for you? And yet it's so simple. I walk into a classroom some days and I just have this idea, and I say let's roll with it. (Charlotte)

However, students and teachers were not the only stakeholders in the AISI projects. Several instructional teacher leaders also mentioned their obligations to parents, to the district, and to the provincial authorities who provided funding and support for their AISI initiatives. In fact, there were many different stakeholders that instructional teacher leaders felt accountable to. Some instructional teacher leaders were cognizant of how their work would be reported back to the district leadership and how it might be summarized in the annual AISI reports. They said that they stressed about the amount of time they were spending in the office, about the lack of hard data to substantiate student growth, and about the lack of response from individual teachers they were working with.

But the time frames, the methods of reporting; they are all shaky at best. I mean, if we take a look at all those final AISI reports, and you take your whole year and you have to distill it all into these little boxes for quantitative results and a little bit bigger boxes for description, how is that helping anybody? (Will)

For the most part, the responses that the instructional teacher leaders gave when I asked them to reflect upon their responsibility and accountability to various stakeholders, revealed that their commitment to the students and teachers in their schools and districts far outweighed their commitment to provincial or district authorities.

Considering project purpose.

I think what I was trying to get it to, was authentic learning. The authentic, engaged experience of the learner, and becoming excited about learning. I know that I just coasted my way through high school, and did only what I had to do. So, from experience I know that I wanted to change that and, as an educational assistant working really closely with students, it just seems so simple to me. You find out about your students and you teach them to read through learning about motorcycles if that's what they're

interested in; if that's what they're passionate about. Or you can teach them about mathematics or science by using topics and themes that they are interested in. And it all seemed so simple, but it wasn't happening. You start with the student, and you turn them into responsible learners, people who are responsible for their own learning. And that is how I built my classroom. That was the way that I functioned. (Jane)

This quote betrays two very important concerns for Jane: she wanted to see “authentic, engaged learning” and she wanted to help teachers connect with their students, to become more aware of their interests and abilities. Jane's reflection on her main purpose as an instructional coach echoed what was said by Charlotte, Maria, Mary, and Anna. Each of these instructional teacher leaders asserted their focus was on improving student engagement and confidence. Could they make the classroom a more inviting and interesting place? Could they help teachers craft challenging and engaging activities? Could they “hook” the students on learning so that they might persist through issues and find fulfillment through agency and ownership?

I'm always trying new things in different ways to get through - and I see that with the kids, and I know that for myself. I needed someone to say, “What interests her?” But my teachers would not know me from a bar of soap. But I remember those kids who got those amazing awards, those academic awards, those for the kids who could sit down and study a textbook and off they went. And the assignments that I did well in were the assignments where I was passionate in it. Like in Art, like in Art I could express myself; it was different. I was always out of the box. But in every other class that I was in I was limited, very limited. Like: “This is how it's done - so just do it.” And I haven't retained it. And I sit back and I think: “What did I learn, just tell me one thing that I did learn from my science textbook, one thing?” (Charlotte)

Charlotte, motivated by her frustrations as a student, said that she was focused on changing teacher opinions, routines and practices to promote student engagement. Charlotte was not alone. In their interviews, most of the instructional teacher leaders related instances where they sought to transform colleagues in order to improve students' experiences. Several coaches said that it started with “seeing is believing” and they stressed that showing a teacher even just a few simple changes might win the teacher over and make the classroom more engaging for the students.

When making big-picture adjustments to the project plan, the instructional teacher leaders said that they could not simply rely on verbal feedback from the teachers they worked with. The instructional teacher leaders said that they had look objectively at the

data (test scores, student work, video recordings of the classroom, student feedback) with their partner teachers, and they also had to be responsive to what they heard in conversations and student interactions, read in teacher surveys, and gathered from administrator feedback. In addition, the leadership in several of districts where these instructional teacher leaders worked invited outside consultants to review their proposals, visit their districts and schools, attend staff meetings and provide feedback. According to the instructional teacher leaders interviewed, the district leadership's intent in bringing in leaders from beyond the district was to gain insight and seek an objective view of the work being done: "Was the present course of action in keeping with the original intent of the project?"

Assessing and Evaluating Personal and Collective Efforts

Their responses in the interviews revealed that coaches and lead teachers looked at success in two different ways or on two different levels. When the instructional teacher leaders discussed success at the district level, they spoke about the project as a whole and whether their collective efforts were worth the time and money allotted to the project. However, most of the instructional teacher leaders preferred to discuss the measure of their success on a more local or personal level, suggesting "aha" moments and sharing success stories that involved teachers or students who ultimately experienced significant transformations. And, when the ten instructional teacher leaders shared examples of what they considered to be failures or lost opportunities, these examples also tended to also be of a personal, relational nature.

Assessing progress and finding success at the district level.

The ten instructional teacher leaders had difficulty defining success and assessing progress at the district level, especially as it related to the overall projects they were involved with and the cumulative efforts of their team. Several instructional teacher leaders, most notably Elizabeth and Will, pointed out that measuring success should come down to more than just statistics about achievement or high school completion from demographic groups in the school district. Both Elizabeth and Will expressed their frustrations when well-meaning administrators, parents, or board members, after visiting

one school or reviewing the district results on provincial achievement tests and diploma examinations, would question whether the efforts instructional leaders were having any impact:

And the board member looked at me and said “Well at some point, we have to realize that there is not an option and that we have to be accountable.” And I said “I do not disagree with you, I don’t disagree with you - the government has put millions of dollars into AISI, and in some places they are seeing growth.” I said “If you took the time to walk around this school division with me, and you asked just the right question, the same question to every teacher that you stopped and talked with, you would see that this district has changed. You would see that this district has grown. You would see that the kids are getting a different education now than they got 10 or 15 years ago.”
(Elizabeth)

Sometimes it’s the intangibles. It’s the qualitative it’s not necessary the quantitative. Some of them are on the outside and if they’re looking, if they pop in on a school, they don’t recognize that there were kids who are quiet and cooperative but are not learning and across the hallway there are kids who are noisy and busy and they are learning. These people have their own particular judgments about whether learning happens in a quiet or busy atmosphere. (Will)

Although other instructional teacher leaders also talked about the difficulty and frustration in demonstrating whether significant changes had been made through their efforts, none were as expressive and direct as Will and Elizabeth. At one point, Will spoke of the yearly reports that the coaching team would write for Alberta Education (and for their own district) and of how challenging they were to put together. He said that there just was not enough quantitative data to satisfy some stakeholders and that the instruments suggested by district and AISI leaders (often standardized test scores) did not align with what the team was working to accomplish. When it came time to write the reports, the team relied heavily on their impressions of what was happening in the classrooms and on teacher satisfaction surveys, both of which could be questioned as rigorous research. Will and the rest of his district team felt an uncomfortable tension when writing the reports; they wanted to show what they knew to be true—that they were making a real difference for students and teachers— but they realized their yearly reports could come across as subjective and self-promoting:

But the time frames, the methods of reporting; they are all shaky at best. I mean, if we take a look at all those final AISI reports, and you take your whole year and you have to

distill it all into these little boxes for quantitative results and a little bit bigger boxes for description, how is that helping anybody? And until you get people on board understanding what it could possibly look like - then I think you will always have that conversation. Is it effective or is it not effective? And I think it behooves us, as educators, to keep extolling the virtues of what can be done. We need to be advocates, we need to get the principals into the classroom and see what can be done; we need to be self-promoters. And we need to talk about it and not be the classroom teacher who shuts the door. You have to open it up and be right out there and say, "This is what I'm doing and this is the process and this is what I'm doing." (Will)

In this last excerpt, Will identified an issue several other instructional teacher leaders also mentioned: the difficulty in evaluating and gauging a project and then reducing a year's work so that it might fit within an online reporting structure. Other instructional teacher leaders said that the process was even more challenging because of the AISI three-year cycle. In accordance with the guidelines from Alberta Education, each district project was given only three years to be fully implemented. At the end of the three-year cycle, each project was supposed to be self-sustaining. In other words the change brought about by the project was to be left embedded in the culture and operations of the schools post project. Hence it would no longer need special funding to support it. In its place, the districts and schools were expected to devise new AISI projects so that there would always be a focus on *current* research and innovation. But, according to most of the instructional teacher leaders, three years was simply not long enough to implement and entrench significant instructional reforms:

It takes time and that was my frustration with AISI. Now it was great that we had to move in three-year cycles but realistically, if you apply any tenets of learning, any tenets of change, three years is just getting started. (Elizabeth)

Elizabeth went on to explain that her school district made some strategic moves to link one project to the next so teachers would feel like there was a progression (from assessment to instructional design to exemplary learning environments); but, even so, she said that many teachers and administrators still felt the district was constantly shifting focus and she said that they sensed loss and apprehension each time one cycle would close and a new cycle would begin.

Assessing progress and finding success at the local school level.

One of the other best moments that I have had, had to do with critical thinking in drama. We had a drama program in our school. How in the world can you bring about critical thinking in drama? So the drama teacher and I sat down together and devised an activity, and after she devised this activity she said, “I do critical thinking every single time that I give these kids an assignment. I am always asking them to do critical thinking!”, and I said YEAH! (Maria)

The ten instructional teacher leaders struggled when they were asked to assess the impact of their work on a district level, but they had no difficulty in sharing and describing what they felt made an impact at a more local level. As evidence, instructional teacher leaders recollected and shared moments when they “finally got through to a teacher”, when they saw students engaged and energized, when teachers shared student work and other artifacts that indicated higher level thinking, and when teachers came together and started rewriting their lessons and unit plans in light of new understandings.

I would have to say, the place where I made the most difference is turning teachers onto the value of research. I’ve kind of opened up a lot of teachers’ eyes to purchasing resources that we used together, to prove their practice. So which of these books would be the best? And where do I find them? That to me has been the best; these collegial interactions, the shared collegial work around using research and implementing and analyzing. I’ve got probably a dozen teachers in our district, who I can say have completely flipped in the way they approach teaching. (Will)

Some of the most satisfying experiences that instructional teacher leaders shared as they reflected on success were “aha” moments, when a particular student or teacher suddenly made a major shift in their thinking. These moments often happened while the lead teachers worked closely with colleagues who were skeptical at first:

Well I think I converted a math teacher into a literacy teacher. She was offered an opportunity to go down to grade 2 and she would now be teaching some Language Arts. She was put into a situation where she wasn’t comfortable. She accessed me as a consequence of her need and she came on board and we planned for her next year. (Jane)

Often these transformative moments came as a result of persistent work on the part of the instructional teacher leader. The coaches and lead teachers interviewed explained that, for some teachers, it could take several years of emails, conversations, informal visits,

and scheduled interactions before that teacher was ready to get going on the “real work” and tackle instructional change with full understanding. Will and Louisa talked about teachers “being in the right place and space” for transformation and how some teachers were just not available because they had so many commitments to their families, to coaching, and other extra-curricular responsibilities.

The instructional teacher leaders said that sometimes success was found in clearing away obstacles for particular that might interfere with progress. Louisa, Elizabeth, Charlotte, Maria, and Will all shared specific examples in which they had to help teachers change the climate of the classroom before they could work on any specific instructional strategies.

When we were talking just recently she said it was when I was teaching with the kids that she would notice things that I would do that she’s forgotten about or didn’t realize that: “Oh, that does really work.” It would be simple things like proximity control, or using visual cues with them so they can understand what it is they have to do. Those little tweaks are little things that have really helped remind her. Now in terms of the planning and preparation of these things, she told me that AISI has been a game changer for her. She said that we get so much production out of the kids now with the two or three strategies that we put in place for her Social Studies curriculum; it ended up transforming the kind of learning that was going on in her classroom. (Will)

However, as thrilling as it was to see individual transformations, the instructional teacher leaders acknowledged that they could not use this as the only indicator of their success in supporting meaningful change. One teacher or one tremendous lesson does not qualify as substantial success. The instructional teacher leaders said that they also tried to assess the impact they had on the whole faculty and how teachers come to discuss, share, and implement instructional reforms. Such reflection often demanded serious and measured reflection both alone and with their instructional team. When discussing whether or not an individual or the team as a whole was making an impact upon a particular school the instructional teacher leaders said that they considered: whether or not the culture of the school was changing, if the teachers were becoming more intentional in their practice, if the teachers and administrators were becoming more collaborative in their professional learning, and if the presence of instructional teacher leaders was being welcomed or in fact causing apprehension, insecurity and closed doors?

Each of the ten instructional teacher leaders shared experiences that shed light on how they assessed if they made an impact upon the culture of the school. Louisa, Elizabeth, Maria and Will said that they could see if they made an impression if the school had amassed an impressive set of artifacts (lesson plans, student work, video recordings, website materials) as evidence of changed practice. Charlotte, Will, Mary, and Caroline said that seeing students engaged and energized by new classroom methods and approaches was another indicator of success. As I read through the transcripts it became apparent that, for most of the instructional teacher leaders, gauging success was related to how well they seemed to get on with the faculty of each school: did they meet with open doors, were they constantly emailing with teachers in need, and did the principals appreciate their efforts and tell them so.

Assessing and Describing Failure

When the instructional teacher leaders were asked to relate experiences that they saw as failures, they overwhelmingly chose to focus on relationships that soured or never even got off the ground. Elizabeth shared difficult experiences with a husband and wife who both happened to teach in her school division. These teachers were reluctant to join in professional learning and would not invite Elizabeth into their classrooms. The situation never really improved over several cycles of AISI. Louisa also shared several examples of teachers with whom she could talk with informally, but never could engage in *meaningful* dialogue about teaching and learning. Will recounted his experience with one particular administrator who made it clear that he and his staff were not interested in change or professional learning. After repeated attempts, Will had to give up on ever getting into the school to do coaching with teachers; instead, he chose to focus on the teachers and schools where they were a little more receptive.

Indeed, almost every instructional teacher leader interviewed saw missed opportunities or broken relationships as the biggest failing in their work. In contrast, when asked about their failures, none of the coaches or lead teachers pointed to struggling students or weak scores on standardized tests. Several instructional teacher leaders lamented the fact that certain AISI projects did not have the impact or sustainability that they had hoped, but the sense of failure related to an overall lack of impact was not as

deeply felt as the lasting frustration they experienced when teachers ignored or rejected their efforts.

So as much as there was much to be learned from the successes of instructional teacher leaders, there is also much to be learned from their perceived failures. Coaches and lead teachers may say they are only focused on the students and on improving learning, but in their interviews they also revealed how *personally invested* they were in their work and the relationships associated with that work. Disappointing test scores and declining graduation rates could be explained and rationalized, both in government reports and in the minds of the instructional coaches. Coaches and lead teachers explained that other factors were in play that impacted the appearance of success or failure: the reported cohort may not be indicative of the whole district; the measures did not align with the goals; the initiative needed more time; and the government changed the assessments. However, soured relationships and the tension they sensed each time they frequented certain staff rooms was much more difficult to ignore or explain away.

Describing the Optimal Climate and Leadership

As a follow-up to their recollections about negotiating roles and dealing with professional and personal challenges, I asked the instructional leaders to suggest what they felt might be the ideal situation for leading instructional change. What kind of context or culture would be optimal for instructional teacher leadership, collaborative reform and school improvement?

I would say that it again has to be, or it is most successful, when it is from the grassroots. When you have the voices of students at the table, when you have the voices of the parents at the table, and when the teachers' voices are considered and they can all contribute to the conversation. I left a community but, with the roundtables that we have been conducting, we have been finding community input is proving to be very important. These are the citizens that will be in the community, and the community has so much to offer for the schools that it would be a shame not to collaborate with them. (Jane)

Jane's perspective was quite broad when compared to others and it showed a connection to the community that Elizabeth and Caroline also had. But, most coaches and

lead teachers chose to attribute optimal culture-building only to the teachers and administrators in the school:

[The reform starts with] teachers who are knowledgeable about what they're doing, passionate about what they're doing; you are trying to develop as much leadership capacity in your school as you can. Give the teachers the trust to do what needs to be done and go with that. As administration, you cannot be micromanaging everything, you've got to let teachers do it. (Maria)

Well I think that such a context or culture needs to have good teachers to start with. These teachers have to be motivated, hard-working, eager, and student focused. After that, I think you have to look to leadership. But if you have trusted teachers and good leadership, it doesn't really matter what the curriculum is, as long as the staff is student focused. Such a staff will get you where you need to be. I believe that it is truly about the teachers; the teachers make the difference. The principal is part of the team; he is part of the picture. You do need someone to guide your focus. (Mary)

Like Mary and Maria, most of the other instructional teacher leaders were quick to point out that instructional reforms needed teachers who were receptive and willing. They also said that success depended upon the type of support they felt from the administrators and the kind of climate the principal had established in the building:

It starts with the principal. I would have a principal who is supportive, kind of like a cheerleader, to encourage people to be involved, but not micromanager, because it is going to impact the relationships in a negative way.

Will expanded on his vision by saying that the optimal climate and context would include instructional coaches who could connect two or three buildings together and significant allotments of time in the day for teachers to collaborate without students. Louisa had a similar vision:

[An ideal] school community would have to start with an administrator who values good teaching to begin with and is making it a daily priority in the lives of its teachers. Because we have a lot of administrators, like I was saying before, who are great managers of people and logistics, but they are not necessarily great instructional leaders... And I think if you want to foster an environment where teachers rise up and contribute to the school community, the first thing that has to happen is that the principal has to enable them to rise up and that he has to support them and make them feel valued and also make them feel that they have something to contribute. It would be kind of a dream to have a principal who would come into your classroom every once in a while, say once a week, and just hang out for 20 minutes with you and the kids and participate in talk with you about what is going on. And it could be a conversation where

you could offer suggestions, it could be a conversation where you are cheerleader and they are motivating you to do more with your practice because they have seen potential there, but I can't say that I've ever been the recipient of that kind of visit or presence in my classroom. (Louisa)

In her interviews, Caroline also suggested that the school administrator has an important role to play and she suggested that principals who wanted to encourage professional learning and meaningful pedagogic change should practice shared leadership, they needed to learn how to step back and let the staff take ownership; to connect teachers who are like-minded and will encourage further inquiry; to provide regular time and support; and to provide timely encouragement. Maria's response was similar to Caroline's but she also pointed out that school administrators needed to 'find the right people', earn trust, and provide direction and focus. When Anne was asked this question, she talked about administrators finding and enlisting the "right kind" of people on staff and building relationships and trust, but she also explained that principals need to be a bit sneaky in that they should let the staff believe that the reforms were originated by the teachers and not the administration.

As a follow-up, I asked the coaches and lead teachers if their work was *dependent* upon school leadership. Almost all instructional teacher leaders said yes, and asserted that the ability to do their work was greatly influenced by the principal. Anne was the only person to say that it was not:

No, because you can say that this is what you want as an administrator, this is what we were going to be doing, but it's really the other bodies that are going to see that it's going to happen or not. And we have seen a few different principals come and go, and they say "Okay, now we are going to be doing this, and everybody's going to be on board!", and it can be stopped really fast by a high school staff that says, "You are an idiot, we are not doing it!" And that is the end of it. (Anne)

When we explored her unique answer further, Anne explained that large high schools often have a culture that transcends the leadership. Principals come and go, and although some principals have more influence than others, for the most part the school operates according to long-established patterns and within a dynamic and culture that has taken years to develop. According to Anne, in the short term individual teachers and administrators can do little to change this culture. Anne also said that small rural schools can be equally hard

to influence because there is so little change-over in staff and there can be an entrenched culture about collaboration and improvement.

Striving for Sustainability

One of the over-riding pressures in doing AISI work was the need to make each project sustainable. Would the strategies and approaches studied and implemented become entrenched in the daily practice of teachers? Would there be significant dividends for students and parents in terms of improved engagement and achievement? Would the lessons learned by students, teachers, and administrators be carried forward when the district shifts its emphasis to another instructional focus? And, most significantly for those involved in AISI, would the initiative or reform continue when there are not any more targeted funds to support it?

Knowing that sustainability was such an overwhelming concern (I too had been an AISI instructional coach and coordinator), I asked the ten instructional teacher leaders to share their thoughts about the legacy of their work and whether or not what they had worked on would be lasting. At the time of the interviews, the study's participants were going through a transition not of their choosing. The funding cuts forced all the coaches and lead teachers to be reassigned to new roles (mostly back to the classroom). This abrupt change directly impacted the interviews I conducted and many instructional teacher leaders openly lamented what they felt was the end of an era:

Well, yeah, when they took away the AISI funding, and after all of this work and all of this time, and getting the whole department agreeing to everything and having it finally working and just when everything seems to be going fairly well, wham!, it is just done. So that was very discouraging. (Anne)

So, when I asked coaches and lead teachers about the legacy of their work and whether the changes they were advocating would make a real difference, a number of them had given it a lot of thought already:

We did change their practice. It was to meet the needs of the students, because with the next group of students the needs are going to shift and so too will the needs of the teachers, so it is an ever evolving thing. So it is the process of them (the teachers) getting to know the students – figuring out if they have everything they need in their toolkit to meet the needs of their students and if they don't, there are resources to help

facilitate that happening. So I do think we made an impact; especially when we implemented a real one-on-one, needs-based, student-centered environment. If I am just being used to distribute information that could be accessed off a website on the needs basis, no – then I have not made an impact. (Jane)

In our own little world, I would say yes we did. Did we impact every single person? I would say no. As a collective for cycle four yes, we had mass change. Not mass that everybody was here and now everybody is here, but with some teachers who were not choosing to come on board when we did differentiated instruction, not choosing to come on board when we did assessment, now we had an instructional coach working beside them it really made a difference. And for some of those teachers it meant going all the way back to differentiated education. And for some of them it was going back to assessment. And what does good assessment practice look like? Meanwhile it was embedded within a meaningful project for kids. So, it wasn't a mass movement but it was certainly a movement for many, many, many teachers. (Catherine)

Of course, it is important to remember that the instructional teacher leaders interviewed volunteered and they were all keen on participating in this study. These AISI instructional teacher leaders were highly invested in their work and it was not surprising to hear that they had already been contemplating the legacy of their work. In their interviews most of the instructional teacher leaders found ways to justify the work they had done and to predict that it would continue in one form or another. Their responses indicated that they were proud of their efforts and that they felt they had made a direct impact on the learning of the students in their schools and districts. The one exception was Maria. In her sharp, matter-of-fact manner, she explained that the work done by AISI lead teachers and coaches was a small part of the overall picture. When asked if she and her colleagues had made a significant impact upon student learning, she replied:

No. I don't. I really honestly don't. I think the biggest impact on student learning is the teacher that the students have in front of them, and the support that they have at home. That is how kids learn. And that is the best way that they learn. You can have as many school improvement projects as you want, but if you do not have the right teacher in front of the right kids with the right supports, you are not going to be effective. For example, I had a student move into my class in the middle of May, and I was his fourth school this year. It doesn't matter which AISI project we are working on, would that child be successful? Not a chance, because he didn't have the support from the family. Yet I had other children, who had fantastic families and I think I did the best I could for them, and did we have an AISI focus that year? No. And they were hugely successful. (Maria)

Once again, Elizabeth was the most detailed in her response to this question about sustainability and legacies. She discussed a multitude of factors that might influence sustainability: the dynamic nature of students and schooling, the job market and Alberta's robust economy, changing values in education and changing assessment instruments, changes in parenting and societal values, and the nature of schools themselves. Elizabeth asserted that there was no real way she could effectively quantify success in terms of student achievement or other markers, but she knew the work of instructional teacher leaders would have a lasting effect.

...we had the nine connected years; it makes the difference. Because the teachers know that it is not going away. They know it's not going anywhere, they have to buy in. Are there teachers in our district who have not bought in? Yup. Are there teachers in our district who are still at superficial level? Yup. But there are teachers who are deeply into what we have been working on. And it is making a difference. (Elizabeth)

According to Elizabeth, her district had changed the way it approached planning and assessment, and these changes were to be entrenched.

On a smaller scale, Anne said that the lessons she and her staff learned through the school improvement work - lessons about action research, about working from the data, about implementing changes and then reflecting on them - would also not be lost. Through the funding and the additional time allotments afforded by AISI, they had developed habits for working and were so committed to them that, once the funding was gone, they would continue to operate this way.

Caroline gave a more wistful yet hopeful answer to this question on impact and sustainability:

I think that AISI and our impact from AISI will fade away. I would say that if we could look at specific cases, and specific teachers, and look at how they internalize certain practices and the support that they had had in getting to that place - that those pieces are not going to be lost, however. But I will say that in the overall landscape, AISI and the work that has been done over the 12 years has provided some fuel for the changes that will be coming. And given us a rich context: here are the experiences, here is what the students are saying, here's what teachers are saying, and hopefully we can learn from this. As a classroom teacher who thrived on the opportunity to expand and grow and reflect on my own practices I would say that my most successful years as a classroom teacher would be the last years that I was in the AISI role. And I would say that even in the years that I have been gone, the changes that I would make once I go back to the

classroom, given those experiences plus this opportunity, would be immense. And I think it's the reflective practitioner who has had the opportunity to fully engage in AISI - that will be the legacy of AISI. (Caroline)

Caroline's reflection on the legacy of her school improvement work echoed the sentiments of many other instructional teacher leaders. When asked what the key to sustainability was, the lead teachers and coaches said that it had more to do with changing the hearts and minds of teachers they worked with than with any particular strategies in literacy, assessment, inquiry or any other focus area in their projects. Several instructional teacher leaders talked about helping teachers refine their professional judgement and giving them the research base and the professional lenses to make informed, student-centered choices in their planning and practice. As Caroline pointed out, sustainability was also linked to these ten individuals as leaders returning to active classroom duty (and to the hundreds of other instructional teacher leaders from across the province in the same circumstances) and putting into practice the things that they had learned as lead teachers and instructional coaches. The experiences these teachers were afforded in professional learning, reading and research, collaborative planning, and practice and action research would have a lasting impact upon the way they would approach teaching, learning, and educational leadership for the duration of their careers.

Summary

Chapter nine addressed some of areas in the instructional teacher leadership experience that could not be captured in the Instructional Teacher Leadership Adaptive Process Model. In my interviews I asked the instructional teacher leaders to reflect on some very particular pleasures and pressures related to the task they had as AISI leaders which included finding personal and professional validation; meeting the requirements of the various stakeholders; and assessing their personal and collective efforts. The chapter also included some of the recommendations that the ten instructional teacher leaders gave regarding what they felt would be the optimal climate for instructional teacher leadership. Finally, in light of the budget cuts of April 2013, I asked the instructional teacher leaders to speculate on their legacy and the legacy of AISI; this chapter included some of their reflections on this topic.

The next chapter is the last chapter. In it I will be discussing some of the overall findings of the study and implications for school improvement.

Chapter 10: Conclusions and implications

Insights gained on Instructional Teacher Leadership and Implications for School Improvement

Eager to learn how instructional teacher leaders facilitated instructional change and how the process of doing so impacted them, I focused this research study on the following question:

How does the role of Instructional Teacher Leader affect educators who take this role, and what can we learn from their experiences?

I conjectured that a qualitative study that asked instructional teacher leaders to share their motivations, choices, experiences, and legacy would inform educational researchers, district and government leadership, school leadership and, especially, anyone contemplating a career move into instructional leadership. As outlined in the first chapter of this dissertation, there were a number of questions related to my original research question:

- How do instructional teacher leaders adjust to new contexts and roles?
- What kinds of challenges do instructional leaders face?
- How do instructional leaders overcome such challenges?
- What factors encourage and sustain instructional teacher leaders through a change process?
- How do instructional teacher leaders' experiences impact them personally and professionally?
- What lessons can we learn from the experiences of instructional teacher leaders?

This chapter, the final chapter of my dissertation, provides a summary response to these questions.

Because this research was carried out as a case study, it is important to note that the study cannot yield empirical or grand generalizations. Instead, the discussion must be limited to assertions and generalizations (Stake, 1995) that are based upon first-hand

accounts from the participating teacher leaders, observations during the interview process, comparison and reinforcement between individual cases, and analysis informed by the emergent conceptual model (theoretical frame). However, the fact that this case study involved a series of in-depth interviews with ten different instructional teacher leaders lends credibility to the observations and assertions made.

It is also important to note that, while the Instructional Teacher Leadership Adaptive Process model has been very helpful in providing a lens through which to examine the instructional teacher leadership experience, it is an arbitrary model based upon the observations of one researcher. The model emerged as I worked through the data and it presented three somewhat distinct adaptive processes (clarifying, engaging, and responding) and one ubiquitous process (reflecting). I must confess that while I made every effort to conduct an organized and trustworthy study, the process of defining and refining a conceptual model (the Instructional Teacher Leadership Adaptive Process Model) proved to be messy and required a significant amount of re-shuffling as the data was reorganized according to perceived themes and categories. Moreover, the conceptual model could not fully describe the complete experience of the instructional teacher leader; it could only convey the kinds of adaptive processes required as instructional teacher leaders negotiated their roles and navigated challenges while championing instructional reform.

These assertions and recommendations made in this chapter must be considered in light of certain limitations. The participants were all volunteers and may not present a true representation of the “typical” instructional teacher leader. The participant accounts were related without corroboration and, as such, must be seen as singular perspectives about very complex interactions and tasks. The study is also limited by my own background as a former instructional teacher leader; the choice of questions and the inquiry focus may reflect understandings and biases that pre-dated the inquiry itself.

However, this study was never intended to present a comprehensive understanding of all the facets of instructional teacher leadership. It was intended to present a description of the instructional teacher leadership experience through the review of a number of credible accounts.

The Challenge of Instructional Teacher Leadership

This study of instructional teacher leadership, which was based upon a series of in-depth interviews with ten instructional teacher leaders, has revealed that instructional teacher leadership is complex. Teachers, who take on this role and the mission associated with it, find themselves in an ill-defined leadership role somewhere between classroom teaching and school or district leadership (principals or directors). For the ten instructional teacher leaders in this study, their charge was quite clear; they were to champion instructional reform; make the connection between theory, research and practice; and *encourage* colleagues to incorporate new strategies and approaches into their regular classroom practice. I highlight the word encourage for a reason; instructional teacher leaders could *only* encourage and support – they were not permitted to make demands or compel their colleagues to change their practice. This charge to lead by invitation only, through dialogue, debate, demonstration, coaching and other subtler approaches to leadership, is what made the role of the instructional teacher leader so fascinating and compelling to study. I was curious to determine how coaches and lead teachers experienced instructional teacher leadership and what this might say about the common attributes and processes they shared.

Negotiation and Navigation.

Negotiation and navigation were two terms that instructional teacher leaders used frequently to describe the work that they did in championing educational reform with teachers and students. Identifying prospective teachers to work with, beginning the professional conversations, and gaining teacher trust (and access to classrooms) often required diplomacy and even some bartering. Teacher leaders sought to build equity with their colleagues, frequently doing minor favors to open the door to more sustained work. Bringing a teacher a coffee along with a simple teaching suggestion or support (a resource or exemplar) often paved the way to more intentional and sustained work such as collaborative lesson planning or team-teaching.

The instructional teacher leaders said that they were required to negotiate their roles and responsibilities with each teacher they worked with. Some teachers were more comfortable discussing concepts and ideas, others wanted to see these demonstrated, and

still others wanted to try approaches with support and feedback. In each case, the instructional teacher leader had to carefully gauge the comfort level of the teacher they were working with and provide just the right kind of support.

When instructional teacher leaders discussed navigation, they were referring to their need to be aware of possible obstructions that could interfere with their school improvement work. At times these obstructions were organizational (related to scheduling, funding, or resources) and at other times they were relational (reluctant, resistant or antagonistic teachers or administrators). In any case, instructional teacher leaders needed to problem-solve and develop ways to either address the issue head-on or find ways to skirt around it.

Specific adaptive processes.

The emphasis the instructional teacher leaders put upon negotiation and navigation substantiated Bowman's (2004) claim that teacher leaders must show "adaptive capacity" to successfully manage change. Furthermore, an analysis of the data from the case study interviews substantiated the notion that instructional teacher leaders go through and are, in turn, shaped by four ongoing processes. These processes I have identified as: clarifying, engaging, responding, and reflecting. The four processes happen concurrently and are iterative. Each time an instructional teacher leader takes on a new task or begins work with a new teacher, he or she must begin to work through all four processes. And, each of the four processes require the instructional teacher leader to use their skills in negotiation and navigation.

Clarifying.

When an instructional teacher leader goes through a process of clarifying, he or she is continually adapting to the role and the expectations associated with it. This clarification is especially important when the instructional teacher leader takes on the job, but it continues to be important throughout the duration of the project. The lead teacher or coaches in this study must constantly deal with changing expectations. These expectations may have been outlined in the project proposal and the mandate found there, from the preconceived notions of the teachers and administrators they are expected to work with, or

from their own motivations and anticipatory beliefs associated with the role. All these role expectations need to be weighed and considered; especially as the instructional teacher leader begins to work in a new school, with a new teacher or on a new project.

All the instructional teacher leaders in this study underwent a transition from classroom teacher to instructional teacher leader at one point or another. For some participants, this transition was difficult; relationships changed and they lost their daily and sustained connection to certain groups of students. Several instructional teacher leaders became disappointed and somewhat disillusioned when they discovered colleagues did not share their commitment or professionalism. And, while several instructional teacher leaders took to the new role easily and thrived in their new contexts and responsibilities, even these instructional teacher leaders also had to continually clarify their role and mandate to properly address the work required.

For the ten instructional teacher leaders, the process of clarifying began the minute any of them entertained the notion of becoming an instructional teacher leader. It involved visualizing and anticipating the new role, likely conversations, possible relationships, and necessary actions, and then assessing if they might be the right fit for the circumstance. Once the prospective teacher leader chose to become an instructional teacher leader or acquiesced to the pressure from others, the clarifying process intensified. The new teacher leader had to learn as much as he or she could about the project goals and the way in these roles should be advanced. For teacher leaders in this study, this part of the clarifying process often involved team meetings with other teacher leaders and their directors; targeted professional learning about the project focus (literacy, inquiry, etc.); and professional learning and support in how to facilitate change (coaching, conducting effective workshop, curriculum planning, etc.). Then, when the instructional teacher leader began to work with students and teachers, the clarifying process extended beyond the teacher leader; he or she also had to clarify expectations and roles for colleagues and school leadership. This process was repeated each time the instructional teacher leader encountered a new teacher or addressed a new situation.

A review of the data concerning the process of clarifying revealed that the decision to pursue teacher leadership is often a gradual process that involves serious introspection.

Teachers moving into instructional teacher leadership may take on the position for a variety of reasons, often prompted by a desire to learn more about their craft (exploration and improvement) and a commitment to the profession and a sense that they could make a difference (duty and agency). Some instructional teacher leaders may actually need to be encouraged by an advocate to take on the role; personal advancement and recognition were not primary motivators for instructional teacher leaders.

Furthermore, the process of clarifying made it clear that teacher leaders need to galvanize their understanding of the project, their commitment to its goals, and their willingness to take on many different roles *before and while* they advocate for the reform and work with colleagues. This requires adaptability; instructional teacher leaders need to be ready to adapt their role and their strategies for engaging others dependent upon student and teacher needs and comfort levels. This adaptation process requires bartering and equity building and asking “What am I prepared to give up in order so I can move the project forward?” Instructional teacher leaders need to constantly consider and re-consider their role and the responsibilities they have to students, teachers, principals, district leadership, and provincial leadership and compare these to the overall project goals. Such minute-by-minute adjustment differs from the more distanced and deliberate reflection that is referred to in the reflecting process (clarifying versus reflection).

For instructional teacher leaders to effectively clarify their roles and responsibilities—for themselves and for the people they work with—they must have relevant experience and possess facilitation skills. Whether they are relatively new to teaching or have been at it a long time, every instructional teacher leader needs a level of credibility as having had significant and recent classroom experience. This credibility does not necessarily mean instructional teacher leaders must have experience at the same grade level or in the same subject area, but it does help. In addition to having practical experience, instructional teacher leaders also need to be knowledgeable about the emphasis of the improvement project (literacy, numeracy, inquiry, differentiated learning, etc.) and how to facilitate an improvement process. Professional learning in how to be an instructional teacher leader is helpful but must be tailored to fit the needs of the project, the school and district contexts and the personnel involved. Simply adopting a program and learning it in isolation before

working with teachers can be counter-productive. Most of the instructional teacher leaders in this study stressed that they learned best when they collaboratively reflected with people in similar roles as they encountered challenges while they performed their work.

Engaging.

When an instructional teacher leader goes through the process of engaging, he or she is starting on the practical work of instructional leadership. Through this process instructional teacher leaders make connections with teachers, involve them in meaningful pedagogic inquiry, connect research with practice, model effective practices, and support teacher and student learning. However, engaging goes beyond the practical and pedagogical; some instructional teacher leaders likened it to an *evangelistic process* where an instructional teacher leader sets out to win the hearts, minds, and spirits of teachers they are working with. They actively sought *converts* to constructivism, balanced literacy, project-based learning, performance-based assessments or any number of other worthwhile educational philosophies or strategies. This *conversion process* involved a great deal of negotiation and navigation as instructional teacher leaders adapted and responded to teachers, contexts, and issues—always with project goals in mind.

Teacher leaders in this study said that engaging a faculty or individual teachers is easier when the administrative team has an understanding of the project and its goals and understands their role in championing the reform. If the administrative team distances itself from the work of the instructional leader or if they misunderstand their role and use the instructional teacher leader in inappropriate ways (as an instructional spy, as coverage for sick teachers, as someone who can “fix” weaker teachers...), the administrative team can seriously undermine the work of the instructional teacher leaders.

Making connections with teachers was paramount to experiencing success in this process of engaging. To truly engage colleagues, instructional teacher leaders had to really listen, find opportunities to connect with their colleagues, and take risks. Teacher leaders in this study suggested that making a connection was easiest when you developed a relationship based on more than just pedagogy and practice. Sharing worlds (both professional and personal) helped establish long-term and effective relationships. In addition, when it came time to implementing changes, instructional teacher leaders found

it useful to take risks and practice “shared vulnerability”. Such fearlessness established a different kind of credibility with teachers and students. Several instructional teacher leaders pointed out that it is easy to champion reforms when you can unpack them at a workshop with only adults in attendance—using video clips and handouts. It is much harder and much braver to champion a reform when you attempt a new strategy in front of a teacher and thirty-five grade seven students whose minds are busy with Halloween preparations, the volleyball match after-school, and the various crushes and interpersonal relationships associated with junior high life.

My research suggests that when instructional teacher leaders engage the faculty they must also engage the administrative team (principal, assistant principal, counselors, etc.). Instructional teacher leaders must ensure administrators clearly understand the project, the role of the instructional teacher leader, and their own roles in championing the improvement focus. Knowledgeable and enthusiastic administrators help cultivate environments for meaningful change when they advocate for the reform, engage in dialogue and learning about the educational focus, provide time and support, clear obstacles (scheduling, resources, physical space, etc.), and give instructional teacher leaders their trust and the room to make mistakes.

As they begin working with their colleagues, instructional teacher leaders should be encouraged to find like-minded individuals (several participants called these people “kindred spirits”) with whom they can begin the process of implementing change. The instructional teacher leaders in this study said that spending time trying to convince skeptics is a poor use of energy. Like-minded individuals who are receptive to adopting new practices can help in “spreading the word” about instructional reform. In addition, the instructional teacher leaders suggested that keeping up relationships through drop-in visits, email communication, phone calls, and “small kindnesses” helps promote professional dialogue and leads to a deepened, more committed working relationship. Such commitment to individuals builds equity and pays dividends later in the projects.

Instructional teacher leaders need to be confident but not boastful or self-immersed. Several common strategies related by the instructional teacher leaders in this study included: the need to stay “real” (be authentic) and confess uncertainty; to practice shared

vulnerability; to value and validate teacher existing practices that have proven effective; and to find opportunities to celebrate minor and major successes. Most of the instructional teacher leaders in this study advocated for a “listen first” and “learn about their world” strategy that sought to connect real world contexts with research (not vice-versa). Moreover, several of the instructional teacher leaders cautioned prospective coaches and lead teachers not to use terms like “best practice” and “research says”. These phrases often cause teachers to question their practice or resent the instructional teacher leader for implying that their classroom practice was suspect. Instead, instructional teacher leaders suggested that asking teachers to identify classroom issues and working from that point was more effective.

It is helpful to establish norms and expectations, either informally or formally, early in the school improvement process to avoid conflict later. This boundary setting serves to establish limits on the kind of work that will be done when the instructional teacher leader is engaging the faculty. The ten interviewees said that when working with colleagues, instructional teacher leaders should take on roles that provide optimal support for their colleagues, advance the project, and improve student learning. Roles that may be skillfully employed in the right contexts include observer, critical friend, mentor, presenter, cheerleader, coach, counselor, champion, model, and consultant. Roles that may damage relationships and impede progress include expert, evaluator, and fixer. In addition the ten people in this study proposed that, rather than focusing on the teacher’s classroom practices and beliefs, instructional teacher leaders will find more success in focusing on and discussing data: student papers and tests, video evidence of student response and engagement, student portfolios, achievement data, and other artifacts. This practice of looking at evidence keeps the conversation and any subsequent interventions concentrated on student experience and performance rather than on teacher competency.

Fully engaging teachers in meaningful reform is accelerated when teachers can see immediate dividends for the time and energy invested. Instructional teacher leaders suggested that a simple tweak to a lesson can manage to “hook” a prospective teacher on the reform. As such, the instructional teacher leaders advocated for: planning collaboratively; sharing significant resources; providing timely feedback; modeling

strategies; guiding teachers to websites and other supports; and working with individual students to provide support and something to discuss and explore. However, as several of the instructional teacher leaders cautioned, it is important that the instructional teacher leader always keep in mind that any support needs to lead to independence. Several instructional teacher leaders cited instances when their helpful service was simply taken advantage of for the moment and no meaningful or lasting change happened.

Responding.

When instructional teacher leaders go through the process of responding, they are finding ways to cope with the challenges associated with leading a change process. These challenges can be organizational (time, resources, scheduling, etc.) and might require the instructional teacher leader to re-visit the project priorities and make adaptations to their approach. Perhaps certain goals are unrealistic given the context, the time constraints, the distance between schools, or the supports available. The instructional teacher leaders in this study recounted various occasions when they had to adjust to certain circumstances or remind teachers of the project's needs. Some adaptations instructional teacher leaders made had to do with: changing with the service model for the project; freeing up time to collaboratively plan with teachers; providing additional support through substitute teachers; pairing up teachers across the district to perform mentorship roles; and re-visiting the project goals to more closely align with what could be achieved under the circumstances encountered. In facing organizational challenges instructional teacher leaders employed problem-solving skills, often meeting in their teams of lead teachers and instructional coaches to discuss certain options and priorities and developing strategies and supports to remove obstacles and clear the way for meaningful work with teachers and students.

However, the process of responding also included finding ways to overcome relational challenges. According to the ten teacher leaders in this study, relational challenges were more difficult to work through than organizational challenges. It proved frustrating to solve issues related to time-tabling and funding, but these issues did not make the same personal and emotional impact upon the instructional teacher leaders. The instructional teacher leaders said that, when a respected colleague refuses to engage or

actively undermines the school improvement work you are championing, their resistance was hard to simply ignore. For teacher leaders, responding in the face of skepticism, resistance, and even active sabotage was the most challenging processes to work through. Responding involved dealing with perceptions and attitudes that were difficult to understand. Responding challenged instructional teacher leaders to develop personal strategies to cope with passive and sometimes active aggression from teachers and even friends who did not share their vision or commitment. Responding asked instructional teacher leaders to face their challenges, persist in their work, find ways to value and validate even the most obstinate of colleagues, and still remain confident in their convictions. In the process of responding, many teacher leaders were forced to re-examine their own personal, professional, and familial priorities to the extent that they considered leaving the role and returning to the safer and more familiar confines of the classroom.

From the instructional teacher leaders I learned that instructional teacher leaders must first understand the shared and individual circumstances of the teachers. Past experiences with educational reforms, current circumstances within the school, and personal, familial circumstances can all have a bearing on whether a teacher is ready to work with an instructional leader or resistant to it. As a result, instructional teacher leaders could encounter teachers who were: overwhelmed with school work and have little energy to give; suspicious and insecure about their own teaching; jealous and resentful towards instructional teacher leaders; dealing with pressures totally unrelated to schooling; or frustrated having lost faith in their school or district leadership. Genuine interest, respect, honesty, transparency, and regular communication can help address teacher concerns and establish at least cordial relations with even the most resistant of colleagues.

In this process of responding it is again, vitally important for instructional teacher leaders to enlist the support and advocacy of the administrative team or find ways to work around difficult or ineffective school leadership. Like teachers, principals and their assistants may also have preconceptions, biases and misunderstandings. Instructional teacher leaders may discover that the school principal: may not share or understand the vision and mission of the improvement project; may be overly protective of teachers and

their time, may see lead teachers or instructional coaches as nuisances; may be jealous of the time and funding allotments given to coaches and lead teachers; or may be frustrated with certain teachers and is looking for a “fixer”. Again, communication is the key in persevering through challenges related to school leadership. The accounts of the instructional teacher leaders suggest that regular visits with the administrative team and an open invitation to observe or partake in the improvement work are two ways to build alliances with the school leadership.

Although challenges such as time constraints or resource allotment are significant, they do not have the same personal or emotional effect as relational challenges. Organizational challenges call for problem-solving or adjusting to the realities of school schedules, routines, and bureaucracies, relational challenges push teacher leaders to examine their purpose and identity. Relational challenges such as dealing with resentment, jealousy, lack of engagement, or resistance and defiance require major adjustments on the part of instructional teacher leaders. Such issues require patience, tact, and diplomacy. Instructional teacher leaders do well to address such tensions by:

- Focusing on project and student needs rather than on relational issues.
- Seeking to validate and respect teacher practices, even among those who are resistant or skeptical.
- Finding simple yet powerful strategies that can be shared with teachers and might open doors to more prolonged and intentional work.
- Allowing teachers time to process what is being proposed and not expecting immediate commitment.
- Practicing “shared vulnerability” in which an instructional teacher leader works in a side-by-side coaching and demonstration role rather than as a consultant or expert.
- Using artifacts and achievement data as a “third point”; examining these with the teacher to see what was really happening.

When encountering skepticism or combativeness, several of the instructional teacher leaders suggested that the best response is no response at all. Instructional teacher leaders related experiences where colleagues tried to “bait” them into public showdowns

and shared the risks involved for winning or losing on such occasions. Showing up a long-standing member of the staff in front of their colleagues and winning an argument may in turn cause the instructional teacher leader to lose the whole staff. Instead, teacher leaders are best to focus on those willing and engaged. Instructional teacher leaders must be cognizant of their own biases; they need to temper their idealistic preconceptions with the lived reality they encounter in each classroom and each school. Not every student, teacher, or administrator will share their enthusiasm and commitment to school reform.

Instructional teacher leaders must constantly consider their own needs and motivations. Instructional teacher leadership is not for everyone, choosing not to be a coach, lead teacher, or consultant may be a wise choice dependent upon personal, professional or familial needs. While instructional teacher leaders are, for the most part, quite self-less in their work and motivations, they may also feel pride and a sense of personal accomplishment when it becomes apparent that instructional reforms and supports begin to gain popularity. Having a sense of accomplishment and feeling valued and validated is essential for instructional teacher leaders and allows them to persist and persevere. The AISI instructional teacher leaders in this study shared that they gained validation from seeing both students and teachers engaged, confident, and self-reliant. The teachers interviewed also said that support groups and networking help instructional teacher leaders gain validation and the energy to persevere in light of organizational and relational challenges; collaboration allows for venting, problem-solving, mutual encouragement and rededication.

One major challenge cited by many instructional teacher leaders was “initiative fatigue” and the continual cycle of school improvement. In Alberta, this fatigue may have been more prevalent due to the three-year AISI cycle. The interviewees shared that teachers “tuned-out” due to the fact that they believed there were too many conflicting or overlapping initiatives. The instructional teacher leaders in this study dealt with this issue by: establishing connections between AISI initiatives and other initiatives from Alberta Education, showing the progression in thought and theme from one AISI cycle to the next, or by simply asking teachers not to get caught up or overwhelmed and to simply share the

concerns they had for their students so that the instructional teacher leaders might help these teachers address these concerns.

Reflecting.

The fourth adaptive process used as a lens to examine the interview data was reflecting. This process involved examining events and issues with an eye to making significant changes in how the instructional teacher leader will continue to provide support and champion the project. In reflecting, instructional teacher leaders re-considered a significant event or issue, examined what occurred from various stakeholder perspectives including their own, considered how they felt about the event or issue, sought further information or insight on the matter, and came to a better understanding of how the event or issue might have been handled.

From the interview data and subsequent analysis I learned the following about the reflective process and how instructional teacher leaders make significant and deliberate adjustments in order to support teachers and their students and hopefully realize the goals of the project.

The reflecting process is unlike the other three in that it did not explicitly link to a singular purpose (clarifying, engaging, or responding). That said, reflecting was an important part of all three of the other adaptive processes; it facilitated more thoughtful and deliberate responses and often resulted in significant and often very successful changes to how the instructional teacher leader went about championing reform.

The reflecting process involved introspection, contextualization, consideration of alternate viewpoints, and it necessitated a decision or course of action. The process could happen at any time and anywhere. It could take place shortly after an encounter or several months later, it could happen in the classroom while working side-by-side with a teacher, or in a team meeting at central services. It could even happen when you were shoveling your walks!

The reflecting process often required weighing the needs of the project, the students and the teachers involved and the instructional teacher leader's needs. It required observation, introspection and analysis as the instructional teacher leader considered the implications of various courses of action.

Emergent Themes that Suggest Further Research

This study focused on understanding the lived experiences of instructional teacher leaders and the kinds of adjustments they had to make to successfully fulfill this role. For inquiry and analysis purposes, I developed a conceptual model to serve as a theoretical frame for contextualizing the study. The four adaptive processes in this model - clarifying, engaging, responding and reflecting - provided both structure and language to clearly describe the lived experiences of instructional teacher leaders.

However, this study also revealed important understandings or themes that go beyond its original intent. In the following paragraphs I engage some of these emergent themes and suggest questions for further inquiry (in italics).

Instructional teacher leadership requires a major shift in how an individual sees himself or herself and the role that he or she may have within the school community. Such a shift is linked to **personal and professional identity** and often is accompanied by uncertainty, stress, changes in relationships, and even anticipation and excitement. How easily instructional teacher leaders make this shift has an impact on how well they are able to fulfill their duties. My study speaks to some of these issues, but only as one part of the whole instructional teacher leadership experience. A more focused study could and should be done in this area. *Is this transition from teacher to instructional teacher leader gradual process or a rupture?*

Instructional teacher leaders, although motivated by altruistic intentions such as student and teacher success, also need to have a degree of **personal agency and empowerment** to feel fulfilled and to persevere in their actions. Several instructional teacher leaders in this study) were motivated, at least in part, by a sense of ownership and achievement. *Just how important are personal goals and individual recognition to those who take on a servant leadership role like lead teacher or instructional coach?*

Public and teacher **perception** as well as local and jurisdictional **politics** and **power** play pivotal roles in how instructional teacher leaders are able to champion and support instructional reform. In this study, instructional teacher leaders were affected by public and district officials who questioned the value of their work and by those teachers and leaders who sought to use school improvement work to improve their professional and

political status. In addition, **policies** that dictated how funds would be spent, how long initiatives could last, and how data would be reported and shared all impacted instructional teacher leaders. *A closer examination on how governance, funding, political pressures, and public perceptions impacts instructional teacher leadership and educational reform would certainly add to the body of knowledge in this area.*

School leadership and district leadership are critical factors in how instructional teacher leaders are selected, trained, empowered, and validated. This study reinforced the belief that school and district leaders need to be knowledgeable, understanding, patient, and practice shared leadership—trusting that lead teachers and instructional coaches will act responsibly and in the best interests of students and teachers. What instructional teacher leaders shared about leadership in their interviews reinforced similar studies by (Harris & Muijs, 2003; Lambert, 2003; Salazar, 2010; Portner & Collins, 2014). *This study of instructional teacher leaders suggests the need for further studies into the various models of school and district leadership and how these models relate to the sustainability of school improvement initiatives.*

Instructional teacher leaders need **workable structures** to fulfill their duties. As several instructional teacher leaders in this study related, simply giving an instructional leader a mission and setting them free was unrealistic and unfair. The process works better when district and school leaders intentionally match instructional teacher leaders and the teachers they work with. This matching process requires transparency and choice. School improvement premised upon instructional teacher leadership also requires clear expectations and buy-in. When such reform is left as an open invitation, school improvement can take considerable time to get started or be ignored altogether. And, when conscripted, school improvement can be disadvantaged by feelings of resentment, inadequacy, and a lack of agency. *What improvement models provide the optimum in both support and flexibility? What is the best design for supporting instructional teacher leaders as they effect meaningful and lasting pedagogical change?*

Relationships are the key to instructional teacher leadership. As borne out many times in this study, it is not enough for instructional teacher leaders to have expertise in content areas or pedagogical approaches; they must also be adept working with colleagues

in flexible and robust ways. Instructional teacher leaders must have significant adaptive capacities. This study suggested that individual teacher leaders build relationships through negotiation and equity building. The study also raised the question as to whether such relation building was intuitive or could be taught. *Do training programs such as cognitive coaching make a real difference in how instructional teacher leaders approach, enlist, and support colleagues in an improvement process?*

Instructional teacher leaders, in the course of their work, often develop helpful **mantras** that sustained their interactions with teachers and students. Some of these mantras include “don’t water the rocks”, “work with the willing if they’re willing to work”, “everybody has their own stuff going on”, “nothing ventured, nothing gained”, and “Rome wasn’t built in a day”. *What role do mantras and self-talk play in the work of the instructional teacher leader? What does the language of the metaphor reveal about the orientation of the instructional teacher leader in overseeing a change process?*

Instructional teacher leaders also learn to rely on **strategies and approaches** to keep them focused on the work of school improvement and, at the same time, preserve working professional relationships. Some strategies shared by instructional teacher leaders in this study include: extending small kindnesses, validating and valuing teacher practice, engaging in collaborative planning, working with data as a third point, practicing shared vulnerability, and celebrating successes at every step in the process. *What are the most effective ways to engage teachers in practical, powerful work?*

It is important to provide **community** to those in instructional leadership roles. Many instructional teacher leaders shared a sense of loss when they moved from being a teacher to instructional teacher leadership; they no longer felt they were part of the teaching community or part of the administrative group. Lead teachers and instructional coaches need to develop a support network and need a safe place where they can share concerns about the work they are doing and the progress they are making. *How can project planners design spaces (physical and online) that may support and network teacher leaders and what are the optimal models for this?*

Throughout this research, instructional teacher leaders attested to the importance of relationships, of getting past assumptions, and of going to the teachers and trying to

learn about their particular context. This approach implies a two-way relationship between the instructional teacher leader (lead teacher or coach) and the teacher they are working with. What the ten instructional teacher leaders reported correlates with a colleague's feedback at a recent conference. She pointed out that teachers in schools would like more agency and ownership of their professional learning, but school improvement when it is rolled out using instructional teacher leaders, often feels conscripted and forced. Even while it correlates with the literature base on this topic (Danielson, 2006; Killion, 2011), the Instructional Teacher Leadership Adaptive Process Model that served as the emergent framework for research and data collection seems to reinforce a top-down model where instructional teacher leaders are charged with a mandate and expected to be change agents. Indeed, the use of arrows in a *downward direction* suggests that instructional teacher leaders go to the schools to work **on** the staff rather than **for** the staff or even **with** the staff. After conducting this study I feel that the instructional Teacher Leadership Adaptive Process Model could be adapted to add a component in which teachers come to engage in school improvement, also undergoing several different adaptive processes that might describe how cooperating teachers opt to partake, how they become engaged, how they transform their practice and how they become committed to the change. If the process model were adapted in this way, it would need to reflect more of a partnership than a strategic intervention. *More research needs to be done on how teachers respond to instructional teacher leaders and why and when they choose to participate in school reform.*

Implications for School Improvement

The case study analysis in this case study sought to investigate six different dimensions that impact the instructional teacher leadership experience (motivations, qualities, roles, challenges, impacts and conditions), identify emergent themes, establish and clarify a process model, and answer one important question: "What effective practices can we learn from instructional teacher leadership experiences?" What follows is a summary of lessons that can be gleaned from this multi-case study as they relate to school improvement. Specifically, I will address the following dimensions of instructional teacher leadership as they relate to school improvement:

- Identifying and selecting instructional teacher leaders.

- Designing school improvement models that incorporate instructional teacher leadership.
- Training and supporting instructional teacher leaders.
- Understanding the role of the instructional teacher leader.
- Understanding the role of the school administrator.

Selecting ideal instructional teacher leadership candidates.

Although this study did not indicate a prime level of experience or training that teachers need to have before moving into the role of instructional teacher leaders, it did substantiate many claims made by Killion (2011) and Norris (2010) about personal characteristics and skill sets advantageous to prospective instructional teacher leaders. When choosing an instructional teacher leader at the school level, it is important to find a person who has credibility with the rest of the staff. This credibility may be related to content expertise and longevity at the school but more frequently has to do with having gained professional respect from their teaching colleagues through evidence of commitment: to students, to improving practice, and to informal leadership. Several participants in this case study proved that teachers who had only been in the profession for a few years may have already built up such credibility.

When choosing an instructional teacher leader to work between schools or at a district level there should be consideration both for credibility in professionalism and practice and for flexibility and adaptability. Can prospective instructional teacher leaders cope with changing contexts, reluctant or resistant colleagues, loss of classroom connection, pressures to performing in public, and a need to problem solve and work independently without set guidelines? Mostly, do prospective instructional teacher leaders have soft skills to negotiate their roles and navigate around organizational and relational issues associated with instructional teacher leadership? And, while instructional teacher leaders need to exhibit such adaptive capacity, they also need to show they have professional and pedagogical backbone to hold fast to the goals of the school improvement projects. They are expected to cling to these goals even while they negotiate their roles with teachers and seek to build equity with them.

The selection of prospective instructional teacher leaders is not a process of simply checking off boxes with credentials and characteristics. School and district leaders must go beyond such straightforward indicators. Many teachers have been highly successful in their classroom, daily working with students, yet they have a difficult time making the adjustment to coaching colleagues. Many successful teachers would be uncomfortable with the uncertainty and unpredictability that is associated with the role. In addition, although many perks and opportunities are associated with instructional teacher leadership, there are significant sacrifices including the loss of sustained teacher-student relationships and the loss of being a part of a school's professional community.

Designing school improvement models that incorporate instructional teacher leaders.

This inquiry into instructional teacher leadership incidentally and fortuitously illustrated three different models for school improvement. In one model, instructional teacher leaders were given a certain amount of time (0.1 or 0.2 FTE) in their schedule to champion an educational reform in their home school and were also expected to continue teaching for the majority of their time. This model for school improvement using lead teachers was frequently employed by many districts throughout the thirteen-year existence of AISI. The three lead teachers in this study reported that, from their perspective, the model worked. Each of these instructional teacher leaders was well-respected in their community and was committed to leading change. All three individuals were confident and did not hesitate to confront weak practices or advocate for change. However, such was not the case in many other schools. In their interviews, some of the other instructional teacher leaders (who had previously been lead teachers in their schools or had worked with lead teachers in their schools) said that the position of lead teacher was a challenging one and that it was often handed to teachers who were not suitable for it. In addition, instructional teacher leaders related instances where teachers who had taken on the position of lead teacher had felt isolated and had difficulty balancing the demands of their classrooms with their responsibilities as lead teachers. These two very different portrayals of the lead teacher model reinforce the notion that administrators must choose teachers who are respected, confident, and able to prioritize. Choosing a teacher who is not

ready or able is not fair to the teacher or to the staff and certainly will not advance the reform in the way it is intended.

The second model in this study was the district instructional coach who operated on an invitational basis. Judging from the experiences and anecdotes of the three coaches who worked with this model, the invitational aspect of this model had both strengths and weaknesses. Teachers who chose to work with instructional coaches were far more committed than those who were directed to work with the coaches (as was the case in many other models). The coaches who used this invitational model could point to dramatic and far-reaching changes with particular teachers and sometimes even within whole departments or schools. The model provided a fair bit of flexibility to make significant changes, such as taking a substitute teacher along to provide time so they could work with teachers. That said, instructional coaches using this invitational model had to spend a great deal of time *selling the project*; time that would have been better spent working with teachers in classrooms. In addition, because the coaching work was not regularly scheduled, sustained, and monitored, the school improvement process worked unevenly, in fits and starts that reflected the ebb and flow of the school calendar.

Judging by the accounts gathered, the third model described in this study, where learning coaches were assigned only to two schools and were matched with a total of four teachers, seemed to have the best possibility for sustained change. The limited focus, clear expectations, regularly scheduled visits, and focused collaborations ensured that, almost from the beginning of each project, instructional work was being done. However, even this improvement model had drawbacks. Too often administrators did not understand the nature of the coaching relationship and saw the project as a way to address weaker teachers. In addition, even if the principal had a reasonable understanding of the project, too many cooperating teachers had been directed to participate. Learning coaches encountered suspicion, resentment, and insecurity. Moreover, some learning coaches were reluctant to help teachers who were not assigned to them, while others spent a great deal of time working with anyone who asked and perhaps lost sight of the original goal of the improvement project which was to pilot and entrench best practices in one or two classrooms rather than simply respond to requests.

This study on the experiences of instructional teacher leaders revealed a need for clarity when designing, implementing, and sustaining a school improvement initiative that involves instructional teacher leadership. All stakeholders need to have a clear conception of their roles. Furthermore, setting up structures that ensure regular, sustained, intentional work should greatly accelerate the rate at which improvement can take place. However, such structures cannot be too prescriptive. Enough flexibility is needed to help instructional teacher leaders and the teachers they work with negotiate the finer points of their own process. If it is expected that the improvement project will only be achieved using one strategy (e.g. side-by-side coaching, PLC work, district workshops, or collaborative planning), it may limit productivity and create false barriers. Instructional teacher leaders need freedom to make changes based upon context and their professional judgement.

Professional learning and support for instructional teacher leaders.

In each of the three different models for school improvement featured in this study, professional learning played an important role. Lead teachers were given preliminary training and participated in monthly or bimonthly callbacks where they would learn more about particular improvement strategies and their role in facilitating these. The other two models, which involved district level coaching, included more intensive training. The seven coaches in the two districts studied engaged in teambuilding exercises, read a wealth of professional publications, and went through training in cognitive coaching and instructional coaching as well as professional learning in the focus areas of the projects they worked on. While such training was appreciated—it was not always seen as optimal. Part of this incongruence stemmed from the fact that the training took place in isolation, prior to actual contact with the teachers and students that would be responsible for. Once coaches officially began working in schools and classrooms with real teachers and real students, many of the scenarios and strategies suggested in their training or orientation sessions proved inappropriate or ineffective. Most of the coaches suggested that the best training happens “on the job”. These coaches said that regular meetings with a team of instructional teacher leaders were more productive and powerful than their sessions prior to the commencement of the project. These team meetings and professional learning

opportunities allowed the instructional teacher leaders to discuss connections between theory and practice and between the ideal and the real, when they had a foot in each of those worlds.

The instructional teacher leaders also indicated that ongoing support in terms of resources, funding, and project leadership was also appreciated. Several mentioned how they felt spoiled by the opportunities they were given to attend regional and provincial workshops, participate in online networking sessions with other teacher leaders and purchase professional resources (texts, kits, and videos) that helped them to develop their expertise.

The study's findings suggest that instructional teacher leaders need training and support throughout their tenure. As well, schools and districts may benefit by embarking upon school improvement programs dependent upon instructional teacher leadership, to strike a partnership with schools and districts where such models are already successfully running. Another worthwhile strategy would be to ease instructional teacher leaders into the role through a mentorship process in which they accompany more experienced lead teachers and coaches and learn through experience and guided practice.

Understanding the role of the instructional teacher leader.

I believe this study of the experiences of instructional teacher leaders added to our understanding, not only about the extent of teacher leadership roles, but of types of adaptive capacity necessary to fulfill those roles. More significantly, as the study progressed it became clear that instructional teacher leaders must be made aware of the complexity of their task, roles and responsibilities early in the improvement process so they may be better prepared to face the challenges of clarifying, engaging, responding, and reflecting. Most instructional teacher leaders interviewed professed to believe in service leadership as the most effective way of championing reform. If this is the case, instructional teacher leaders need to understand not only what they may gain by taking on the role, but also what they may lose. As an instructional teacher leader, one may: enjoy more access to professional learning, create a more flexible schedule, and be free from many difficult tasks involved with classroom teaching. However, instructional teacher leaders may also experience a sense of loss related to community (no longer serving in one school and

bonding with one class) and disorientation as they find themselves caught between the worlds of classroom teaching and administration. In addition, instructional teacher leaders must understand that they have delicate work to do negotiating roles and tasks and navigating structural and relational obstacles. If teacher leaders are not prepared to build relationships, take risks, confront poor practices, and advocate for meaningful reform, instructional teacher leadership is not for them.

The ten instructional teacher leaders in this case study were prepared to make suggestions to those who were new to this role. Their advice is summarized in the following list:

- **Be authentic.** Although it may sometimes feel as though instructional teacher leadership is all about convincing others (sales); instructional teacher leaders shared that they made the greatest inroads when they spoke plainly and honestly, when they shared their own experiences and misgivings, and when they made themselves vulnerable by trying new practices with the teachers they worked with.
- **Be adaptable.** Instructional teacher leadership requires flexibility and a great deal of problem solving. Those who tried a “packaged” approach found out that one size does not fit all.
- **Truly listen.** Study participants suggest that, to make useful connections between theory and classroom practice, instructional teacher leaders must make a concerted effort to understand the realities, opportunities, and constraints that may be found in each teacher’s classroom.
- **Be persistent yet patient.** Not every teacher will be ready to learn or engage in improvement work when you want them to. Instructional teacher leaders shared many instances where change came slowly, after repeated entreaties, modeling, support, and setbacks.
- **Build in intermediate goals.** Instructional teacher leaders must find ways to regularly celebrate progress and success to sustain momentum and encourage further inquiry and application. Instructional teacher leaders pointed out that many goals of the project are quite lofty and are tied to end-of-year assessments, and that focusing only on those goals can stall the project.

- **Practice shared vulnerability.** Taking risks with the teachers through modeling, team-teaching or collaborative inquiry can build lasting relationships. Teacher leaders shared that simply giving advice or resources often cultivated dependency or even disengagement. Teachers need to be actively involved to invest in the change.
- **Use data, artifacts and student feedback.** Instructional teacher leaders shared that they had an easier time in confronting poor practice when the focus was taken off of the teacher and centered on evidence of student engagement and achievement.
- **Establish routines and build relationships.** The interviews suggest that meaningful change only happens when it is encouraged, sustained, and built upon. The instructional teacher leader's role is to cultivate lasting relationships that involve regular visits and repeated reflection.
- **Validate and value teachers.** Instructional teacher leaders must be sensitive when drawing on their expertise. Instructional teacher leaders explained that unthinking comments involving phrases like: "best practice", "research says", or "I never had that problem when I taught this" only served to devalue the teachers and create barriers.

Understanding the role of the school administrator.

This study confirmed the notion that school leadership plays a pivotal role in the success or failure of instructional teacher leadership work. Principals and their associates who did not fully understand their roles or the roles of instructional teacher leaders often found themselves working against the reform and presented real challenges for instructional coaches or lead teachers. Principals and associates who understood their roles and were sympathetic to the goals and roles of instructional teacher leaders helped clear obstacles. The instructional teacher leaders in this study pointed out that school leaders did not have to completely understand the instructional change itself (improved literacy practices, project-based learning, assessment for learning etc.) but they did need to be supportive and pro-active.

Suggestions that instructional teacher leaders had for effective school administration include:

- **Take an active role.** Principals who simply announce that coaches or lead teachers will be working with staff and then lose themselves in the daily management of school miss an opportunity to learn with their staff and build a greater understanding and consensus about pedagogy and practice.
- **Problem-solve.** Principals need to work with instructional teacher leaders to meet structural and financial challenges that often come arise. Such problem solving may involve creative scheduling, providing time during staff meetings and PD days, securing resources, and helping to explain/champion the reform to the staff.
- **Create a learning environment.** When principals lead by example, raising questions and involving staff members in discussions about engagement and learning rather than focusing only on protocols and responsibilities, the culture in the building changes and it makes it easier for instructional teacher leaders to engage colleagues in school improvement work.
- **Make the match.** Teachers and teacher leaders should be effectively matched. As the building leader, it is incumbent upon the principal to anticipate issues and protect vulnerable teachers and teacher leaders. Some teachers may not be secure enough or at the right place in their careers for such intensive and often humbling work. Making a poor match can cause tension and mistrust and may set back efforts made by well-meaning instructional teacher leaders.
- **Celebrate.** Teachers and teacher leaders need affirmation. Principals have an obligation to highlight important markers in the school's improvement journey.

Summary

This chapter consolidated and summarized observations and assertions made in chapters five through nine. The Instructional Teacher Leadership Conceptual Model provided a useful framework to pinpoint many issues related to change leadership and the strategies successful instructional teacher leaders have used to overcome these issues. In fact, the four adaptive processes – clarifying, engaging, responding, and reflecting – have

proven useful to explain the dimensions, opportunities, issues, and responsibilities associated with instructional teacher leadership. The examples and insights from the ten instructional teacher leaders should provide a better understanding of the complexity of this important role.

The chapter also included some suggestions to those who may consider instructional teacher leadership or the implementation of an improvement process that incorporates instructional teacher leaders—such as learning coaches, lead teachers, consultants or coordinators—who do not have and do not want the administrative authority to compel colleagues to enter into such a process. Instead, these individuals prefer to build relationships based upon trust, respect, good intentions, and meaningful inquiry based upon real data and honest feedback.

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Appendix One: AISI Fact Sheet

September 2011

FACTS ABOUT THE ALBERTA INITIATIVE FOR SCHOOL IMPROVEMENT (AISI)

I. What is AISI?

AISI is a bold approach to supporting the improvement of student learning by encouraging teachers, parents, and the community to work collaboratively to introduce innovative and creative initiatives based upon local needs and circumstances. AISI is characterized by the following 12 attributes.

1. **Partnership** – AISI is a partnership among teachers, superintendents, trustees, business officials, universities, parents, and government. By working together, the partners continue to develop new relationships, strategies, and practices that provide long-term benefits to teaching and learning in our province.
2. **Catalyst** – AISI is a catalyst for change. The common goal targeted funding, partnership, positive climate, and supportive infrastructure act in concert to achieve significant change in teaching and learning.
3. **Student focused** – AISI communicates a compelling commitment to school improvement that aligns with the long-term vision of Alberta Education. AISI projects continue to strengthen the focus on student learning and accommodate the diverse learning needs of individual students and special populations.
4. **Flexibility** – School authorities choose strategies that enhance learning in the local context.
5. **Collaboration** – Projects are developed and implemented with meaningful involvement of the school community. The active engagement of staff, students, parents, and partners is critical to project success.
6. **Culture of Continuous Improvement** – AISI promotes a culture of continuous improvement that is evident in schools and jurisdictions that clearly align school improvement goals, classroom practices, and performance.
7. **Evidence-based Practice** – Evidence that educational practices benefit student learning and performance, through the collection, analysis and interpretation of data, is foundational to AISI. The use of multiple methods and data sources gives Albertans confidence in the results.
8. **Research-based Interventions** – Solid research provides a reasonable expectation that improvement will occur. Implementation of effective instructional strategies is core to AISI projects. AISI is a vehicle for testing the efficacy of these interventions in the Alberta context.
9. **Inquiry and Reflection** – A clear focus on student learning is the foundation for inquiry and reflection. Analyzing strategies that worked and building on them lead to continuous improvement. Strategies that did not work as expected can provide important information about what needs to change and what might be successful.
10. **Building Capacity and Sustainability** – Effective PD is planned, systemic, and sustained. Promising practices, tools, products, and processes developed and/or acquired through AISI will benefit Alberta's students in the future.
11. **Knowledge** – AISI contributes to the body of knowledge about teaching, learning, and instructional improvement. The AISI family shares this knowledge widely through conferences, reports, the Clearinghouse, and provincial networking sessions.
12. **Networks** – AISI networks contribute to the exchange of information, ideas, and resources as well as communication and knowledge dissemination. Networks include face-to-face and digital interactions and may be local, provincial, national, and/or international.

II. AISI Cycle 4 (2009-2012) Framework Goal

To improve student learning through initiatives that enhance student engagement and performance and reflect the unique needs and circumstances of each school authority.

Principles

1. AISI projects will focus on student engagement, learning, and performance.
2. Collaboration, shared leadership, support of those who will implement the projects, and meaningful involvement of the school community are essential elements for school improvement.
3. AISI reflects the complexity of innovation and change processes.
4. The school authority project(s) is/are part of the three-year planning and reporting process for purposes of the school authority's annual planning, reporting, and accountability processes.
5. AISI projects will have a balance of local and provincial measures that include approved quantitative and/or qualitative measures, appropriate to the project.
6. AISI project plans will reflect insights from research, literature, and related AISI projects.
7. The knowledge generated through AISI will be widely disseminated.
8. Networks that contribute to the goal of AISI will be created and/or enhanced for knowledge dissemination and the exchange of information, ideas, and resources.
9. Alberta Education will provide targeted AISI funding to school authorities.

III. Funding

- AISI funding is targeted, which means it is provided to school authorities for specific local initiatives that are focused on improving student learning. This funding is in addition to basic instruction funding.
- Annual funding is provided to all provincially funded school authorities in Alberta (ECS to Grade 12) eligible to receive AISI funding at the current (2011-2012) base amount of \$69.70 per registered student in Grades 1 to 12 in public school authorities, and \$34.85 for Early Childhood Services (kindergarten) students. Private school authorities receive 60% or 70% of public school funding based on the provincial funding accountability agreement.
- The funding entitlement to each school authority for any given school year is based upon the previous September 30th registered student count.

IV. Project Requirements

Project Application

Each AISI project plan/proposal requires the following:

1. Project description
2. School community involvement
3. Support of implementers
4. Literature and research (citation and application)
5. Improvement goal(s) aligned with strategies and measures
6. Measures (quantitative, surveys and qualitative), baseline(s) and improvement targets
7. Key strategies and processes (instructional strategies, student assessment, project management and coordination, professional development, parental and community involvement)
8. Evaluation process
9. Integration and sustainability

10. Knowledge dissemination and sharing
11. Networking
12. Ongoing administrative support
13. Staffing requirement
14. Budget projections and comments
15. Certification by AISI Coordinator and Superintendent/CEO

Measures

- Every project plan requires a set of performance measures to evaluate success.
- Quantitative measures with numeric data fall under two broad categories:
 - Student learning measures directly related to student achievement.
 - Survey measures such as satisfaction and attitudes of students, parents or teachers.
- Qualitative measures and data provide rich descriptions with a focus on process, meaning and human behaviours as they occur in context. Sources of evidence might include interview/focus group transcripts, written reports, observations, video/audio recordings, artifacts, documents/portfolios, etc.
- Student learning measures include Provincial Achievement Tests (PAT) and Diploma Examinations (DE), high school completion and drop out rates, commercially available standardized tests, and various locally developed tests/assessments.
- Survey measures include Provincial Accountability Pillar survey results as well as locally determined satisfaction and attitudinal surveys.

Annual Reports

AISI projects require an annual report. The final annual report includes a summative evaluation for all the years that the project was funded. The annual report includes:

- Results achieved in relation to baseline and targets for quantitative and qualitative measures;
- Description of evidence of success achieved or description of quality measures;
- Actual expenditures and expense percentages in relation to the original budget estimates; and
- Responses to open-ended questions. The open-ended questions for the final (summative) report focused on the following areas:
 - Student learning outcomes achieved
 - Other project goals achieved
 - Lessons learned
 - Effective practices (instructional strategies, assessment, professional development, project management, parental involvement) that demonstrated the greatest impact on student learning and educational practices
 - Sustainability and integration
 - Summary statement of project results including conclusions and implications for continued
 - improvement in student learning

Data Analysis

Four analyses are performed on project data to determine success:

1. Results that met or exceeded annual **targets**.
2. Results that improved over the **baseline**.
3. Magnitude of improvement through **effect size analysis**.
4. Relative effects of various project categories through **meta-analysis** (refer to the [Provincial Reports](#) (using the AISI Publications Search) on the AISI website for detailed information on effect sizes and meta-analysis).

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V. Support for Implementation

School Research and Improvement Branch (SRIB): The School Research and Improvement Branch are responsible for AISI and provide the main support to school authorities. Staff members work directly with local AISI Coordinators assisting school authorities to meet project requirements and to continually improve their projects. The branch generates a variety of reports including the annual provincial AISI reports. **For more information about AISI please contact the School Research and Improvement Branch at: (780) 427-3160.**

• **AISI Website** <http://www.education.alberta.ca/aisi>

The AISI website is a one-stop shop for all information about AISI. The contents include:

- Background information on AISI
 - A Clearinghouse of AISI projects and promising practices
 - Supporting documents for planning and implementing AISI projects
 - Literature synopses, research reports, and other publications related to school improvement
 - Workshop and conference information and registration tool
- **University Support:** Funding is provided to the three Faculties of Education (University of Alberta, University of Calgary, and University of Lethbridge) to provide direct assistance and information to school authorities requesting advice on related AISI literature, improvement strategies, measures and evaluation, and other areas of local need.
- **Independent Schools Support:** Funding is provided to the Association of Independent Schools and Colleges in Alberta (AISCA) to provide direct assistance to the private school authorities related to their AISI projects. For more information contact AISCA at (780) 469-9868.
- **Ongoing Professional Development:** Annual AISI conferences, visitations, and regional and provincial professional development workshops are examples of the formal support provided.
- **Electronic Management System:** The online AISI management system is used for the submission, review, and approval of project proposals and reports. The system enables school authorities to review and update their project plans and share information.
- **Technical Assistance:** Alberta Education's Client Services Help Desk Team assists AISI project coordinators in accessing the Extranet (a secure site for school authority data). SRIB staff provides ongoing assistance to school authorities in working through the AISI online application and report forms.
- **AISI Provincial Reports:** AISI provincial reports summarize AISI outcomes and lessons learned and are available on the AISI website.

VI. The AISI Education Partners Steering Committee (EPSC)

The AISI partnership has resulted in the building of trust, collaboration, and teamwork among the seven education partners who represent diverse interests in providing education for children. This partnership was a major contributing factor in the successful design and development of an exemplary school improvement model. We can take pride in the fact that Albertans developed AISI in the Alberta context. AISI represents the collective wisdom of the partners and other stakeholders, whose strong commitment contributes to meaningful improvement in student learning and performance. EPSC consists of:

- Alberta Education (AE)
- Alberta School Boards Association (ASBA)
- Alberta School Councils' Association (ASCA)
- Alberta Teachers' Association (ATA)
- Association of School Business Officials of Alberta (ASBOA)
- College of Alberta School Superintendents (CASS)
- University Faculties of Education (University of Alberta, University of Calgary, and University of Lethbridge)

Appendix Two: Semi-structured Interview Guide

Examining the Experience and Role of the AISI Teacher Leader

Interviews Overview

Before partaking in any interviews, study participants will be asked to provide background information. This information may be collected through a preliminary interview (over the phone), on paper, or in person before the first interview. Any communication will stress that, for selected participants, their commitment will entail four separate interviews, each on a different aspect of teacher leadership. Ideally these interviews would be conducted over a two month period and involve a number of visits. There may be instances where, for convenience sake (when there is considerable travel involved or time constraints), several interviews may sometimes be conducted back-to-back with time allotted for breaks.

Interview Guides

The following interview guides are intended to prompt respondents to respond to topics and issues addressed in this study. Interview questions were framed according to the research question guiding the study. The interview guides are just that, guides. Depending on how the interview unfolds, not every question may necessarily be asked. The focus on the interviews will be in eliciting rich stories, description and examples. If a teacher leader shares an extensive narrative they will not be interrupted with questions that will likely be dealt with during the course of the narrative.

Every interview will begin with an introduction to help respondents feel comfortable with the interactive nature of the interviews and with the audio-recording device used during the interviews. The introduction will also reiterate that their participation is voluntary and they may withdraw from the study if they so choose.

Basic introduction for all interviews:

Thank you for agreeing to meet with me today. With your permission, I am going to record our conversation. As you were made aware of in the consent form you signed, I will be transcribing the recordings (or at least the most significant parts) into written text. When I do this I will be careful to use pseudonyms for you and for anyone you may refer to in your responses. You may stop the interview at any time to take a break, and, if you change your mind about participating in the study during the course of the interviewing process, you may withdraw from it altogether.

This interview should last approximately 45 minutes to an hour to complete. There are approximately 10 questions on the interview guide, but depending upon the length of your answers I may choose to ask only a few questions. Please feel free to explain and describe at length. For the purposes of this study we are looking for rich detail not broad overviews.

Before we start:

- Are you comfortable with our location?
- Is this a good place to put the audio-recording device?
- Do you have any questions for me before we begin?

Background Questions

1. How many years have you been a teacher? At what grade levels and in what capacities or subject areas?
2. How many years have you been an instructional teacher leader and in what capacity? (School-based or district-based? Lead teacher, instructional coach, consultant, etc.?)
3. What is the highest level of education that you have attained (B.Ed., M.Ed., etc.)?
4. Did you receive any specialized training or orientation before becoming an instructional teacher leader?
5. What improvement projects have you been involved in? In what particular context?
6. Please describe the role that you played/are playing as a teacher leader...
 - a. Who were the people you served?
 - b. Who were the people you worked with?
 - c. What were your goals?
7. Based on your experiences and the work you have seen from others, how would you define instructional teacher leadership?
8. What core values and personal attributes would you say that an instructional teacher leader needs to be successful in this role?
9. What competencies, expertise or training do you think that aspiring instructional teacher leaders should have before starting in this role?

Interview #1 Becoming an Instructional Teacher Leader (initiation)

1. How did you become a teacher leader? Were you asked or pressured into being one? Did you reply to a job posting? Perhaps you gradually grew into the role. Please describe how it all came about.
2. Why do you think you became an ITL? Reflect upon your interests, talents and circumstances.
3. Reflect upon your earliest days as a ITL; what do you think were your greatest challenges?
 - a. Did you feel ready? Confident?
 - b. Were you clear about your role?
 - c. Did you feel supported?
 - d. What kinds of early support did you receive? How did it help?
4. How were you initially received by your colleagues as a teacher leader in your school or district? How did you feel about this response?
5. Can you describe one or two of your first interactions with a particular staff member or student in your role as a teacher leader? What did you find particularly memorable about this interaction?

6. Did you have any negative or discouraging experiences in your first few months? Could you describe these experiences?
7. Reflecting upon early disappointments or challenges, what advice would you give to aspiring teacher leaders?
8. At what point did you know that you had successfully transitioned to the world of the teacher leader (from the world of the teacher)? How did you know?

Interview #2 Working as an Instructional Teacher Leader (roles)

1. Could you describe your typical day of work as an instructional teacher leader?
 - a. Who did you work with?
 - b. What kinds of tasks did you do?
 - c. How did you follow-up on your work or sustain improvement goals?
2. Here is a list of teacher leadership roles (had out a paper copy). Of the roles listed, which do you feel you spent the most time doing? Which the least? Explain why.
3. What did you find to be the *most effective way* to provide support for your colleagues?
4. Could you comment on the effectiveness of the following models to your work as a TL?
 - a. PLCs, study groups, or collaborative planning,
 - b. Informal classroom visits and one on one meetings (mentorship),
 - c. Providing resources and structured workshops, or
 - d. Instructional coaching and demonstration.
5. Describe how you would go about starting a supportive relationship with a particular teacher or staff. You may give examples from your experiences.
6. Can you describe a situation or two where your work with a staff, small group, or single teacher was truly transformative? What made the experience so successful?
7. Can you describe a situation where you felt you were **not** successful in leading for change? What were the biggest hurdles or roadblocks? What would you do differently, if given the chance?
8. If you were to list two or three ongoing challenges (not relational) to your work as a teacher leader, what might they be? How did you deal with these? Are they still challenges?
9. One author (Bowman) stresses that teacher leaders need “adaptive capacity” (problem solving and flexibility) to be successful – can you relate some examples where you had to negotiate your role and relationship with a teacher in order to meet your improvement goals?
10. What advice would you give to a teacher leader who is struggling to make inroads with a particular staff or teacher?

Interview #3 Living as an Instructional Teacher Leader (relationships)

1. What initially motivated you to become a teacher leader?
 - a. Recognition – I needed to be valued and validated for my expertise
 - b. Exploration – I wanted to learn more about effective practices and research
 - c. Self-Improvement – I wanted to improve my own classroom practice
 - d. Community – I felt it was my duty to the school community to take on this leadership

- e. Agency – I wanted to have a say and an impact upon the teaching and learning in my school
 - f. Networking – I wanted to connect with other educators, to share and learn with them.
 - g. Other?
2. Some educational researchers (Barth in particular) identify time, opportunity, resources and support as major challenges for teacher leaders. Other researchers talk more about the adjustment to new routines, responsibilities, and roles (Norris, Mangin & Stoelinga). What did you find to be the greatest personal challenge to your success as a teacher leader?
 3. Two researchers (Mangin & Stoelinga) have said that teacher leaders often soften their message or avoid giving “hard feedback” in order to maintain good relationships. The same researchers also found that teacher leaders will downplay their expertise to seem like one of the staff. This soft-peddling can actually interfere with meaningful reform and will ultimately undermine the role of the teacher leader. Did you ever find that you fell into the same trap? Explain.
 4. Several authors have written about the phenomena of being between two worlds; you are no longer a “fellow” teacher, but neither are you an administrator. Have you ever felt “out of place” or like you were an outsider? Do you ever consider going back to the classroom full time or moving into administration? Why?
 5. According to Barth, one of the biggest challenges for teacher educators is in dealing with colleagues who may not appreciate “being helped”. Did you ever encounter skepticism, apathy, or resistance? Can you list a couple of examples? How did you deal with such pressures?
 6. Were there any times when you were discouraged and thought about quitting? Could you describe one of those moments? What made you persist in your role?
 7. What would you say is the most satisfying aspect of your job as a teacher leader? Why?
 8. Did you experience any benefits from working as a teacher leader? What were these? (\$, time, titles, training, freedom, etc.)
 9. Did your job as a teacher leader affect your family and friendships in positive or negative ways? If so, how?
 10. If you were to reflect upon your work as a teacher leader, what would you say is the one element or accomplishment you are most proud of?

Interview #4 Reflecting on Instructional Teacher Leadership

1. Several leading educators (Danielson, Barth, and others) have said that **all teachers are leaders** and can practice teacher leadership. Do you feel this is the case for someone who is an Instructional Teacher Leader in a role such as yours? Why or why not?
2. Do you feel that teacher leadership can be taught or is it learned on the job? Explain.
3. What values and attributes would you say that a teacher leader needs to be successful in this role?
4. What competencies, expertise or training do you think might be valuable for aspiring teacher leaders? If you were to establish some sort of training program for aspiring teacher leaders, what might you include?

5. Can teacher leadership be abused? How might teacher leaders violate trust or mislead their colleagues?
6. In your experience, do you feel that the nature of instructional teacher leadership has changed in Alberta? How so? Do you feel that Alberta teachers are more or less receptive to the work of teacher leaders?
7. What kind of context or culture would be optimal for teacher leadership, collaborative reform and school improvement?
8. What do you think the role of Central Office should be in teacher leadership?
9. How can school administrators encourage and support teacher leadership?
10. One last question - do you feel that teacher leaders, like yourself and your colleagues, have made an impact upon student engagement and achievement? What makes you say this?

Appendix Three: Instructional Teacher Leader Summary Profiles

This appendix provides a description of the ten subjects who were interviewed as part of this case study research. Each of these instructional teacher leaders provided a wealth of detail in describing the experiences and in relating their insights as lead teachers, instructional coaches, and project coordinator. The appendix provides an overview of individual contexts for each of the instructional teacher leaders to show how individuals make the role their own. As a group, the instructional teacher leaders interviewed represented a rich and diverse sample set; they illustrated the complexity of the role and the need to consider not only the needs of the project and the teachers who will be served by the project, but also the needs of the individual instructional teacher leader.

What follows are ten summary profiles of the case study participants. Each profile was intended to answer four essential questions:

1. Who is this instructional teacher leader? (What is his or her background, training, interests, experience, etc.?)
2. What motivated this instructional teacher leader to step into the role?
3. What leadership or support did the instructional teacher leader provide?
4. What are the instructional teacher leader's beliefs about their work?

In order to make them more accessible, the summary profiles are written in a descriptive rather than analytic style. As this appendix was intended only to provide a summary of each participant's characteristics, motivations, contexts and beliefs, I chose to refrain from using participant quotes so that I could use these quotes more effectively and appropriately in the cross-comparison analysis and findings (chapters 5-9). Due to the fact that these summaries were written early in the process and helped inform the cross-case analysis, there may be repetition of assertions, anecdotes and insights between the main body of the dissertation and this appendix.

Please note: these summary profiles are based upon the responses of the instructional teacher leaders during the interviews; I did not seek to affirm the veracity of their statements through follow-up conversations and interviews with co-workers, partner teachers, or supervisors. As such the summary profiles only reflect the accounts, the perceptions and the perspectives of the instructional teacher leaders themselves.

Charlotte (1) – Learning Coach

In her interviews, Charlotte pointed out that she considered age not be a barrier to leadership. At the age of twenty-seven, Charlotte could say that she had already amassed much of the experience and training needed to be successful as an instructional teacher leader. Moreover, Charlotte maintained that she had one of the most important requirements in leading for instructional change; she had a passion for teaching and learning and a desire to make a difference beyond her own classroom.

Charlotte was originally from Australia and took her teacher education there. Charlotte reported that she had a background in special education and had a special connection with students who had difficulty learning from traditional methods. Charlotte said that she identified with these students and could also remember being frustrated when she was a student. Charlotte said she could see already in grade school that students who succeeded most often were those who could sit straight, feign interest, and regurgitate whatever their teachers told them. Charlotte shared that, as a student, this was not the case; she needed to ask questions to make the learning her own, and she needed to dive into learning by doing hands-on activities. Not every teacher afforded Charlotte these possibilities. For this reason, when Charlotte became a teacher, she naturally gravitated to educational reforms that focused on differentiated instruction, inquiry, and student engagement. Charlotte also found opportunities to take risks and implement less traditional, more hands-on strategies through a “Learning through the Arts” program implemented at the first Alberta school she taught at. Charlotte’s outgoing and dynamic nature led her to share her classroom discoveries with the colleagues in her school and helped her to move into unofficial and informal instructional teacher leadership roles.

Charlotte traced her transition into teacher leadership to her passion for learning and wanting to make a difference “for her kids”. She also acknowledged that a few people in leadership recognized her passion and gave Charlotte an opportunity to take on instructional leadership challenges. In particular, Charlotte mentioned her AISI coordinator who asked Charlotte to share her experiences at the district level and encouraged her to apply for instructional coaching training (and an eventual district-level position) when the opportunity would be advertised. This is not to say that Charlotte became an instructional

teacher leader purely by circumstance; early in her career she sensed that the limited environ of one classroom and one group of students was too confining for her and did her best to advocate for more educational opportunities to her principal and to those who might listen at district office. In our interviews Charlotte revealed, in both direct and indirect ways, that she is always up for a challenge; be it in the school, between the schools, or even at home (where she trains horses and dogs). Charlotte shared that she would never be content with settling into a “safe and predictable” 30-year career; teaching the same grade level, following static curricula, and implementing fixed routines. She conceded that she is too creative and impulsive and would soon get bored or frustrated and start searching for the next challenge. This desire for continual change had much to do with Charlotte’s motivation for becoming an instructional teacher leader.

In the work Charlotte did as an instructional coach at the district level (working with two schools and four assigned teachers in particular), Charlotte supported both the teachers she was partnered with and reached out to other staff members who wanted to find resources, learn about strategies, network with others (inside and outside the school), and explore new ideas. She knew that several teachers she partnered with were actually “voluntold” (more or less compelled by their administration) and that undercurrents of resentment, insecurity, and even anger were part of this conscription. To get around these tensions, Charlotte tried to build relationships with the teachers by being of service; no task was too menial for her. She related instances where she helped set up teacher classrooms, walked other teachers through assessments, and took over classrooms while her partnered teachers watched and sometimes critiqued. For Charlotte, instructional teacher leadership was about taking risks and making herself vulnerable so she could be seen as credible and as a comrade in the trenches and not as an evaluator from district office. Charlotte also took on a variety of roles and tried many different approaches to support her partner teachers. True to her special education background and her sensitivity to learning styles, Charlotte quickly abandoned the side-by-side model of coaching advocated by her trainers and fell into differentiated and individualized support that would include modelling, deep discussion, resource provision, co-planning, and observation.

Charlotte made some personal and professional adjustments to fulfill her role. Some of her friendships changed and, for Charlotte, that was okay; they had to change. In her first few weeks on the job, she encountered some skepticism (related to her age and to the purpose of the project) and felt a perceptible change in the atmosphere of the staffroom where former colleagues were now making comments about “becoming one of them”. But Charlotte did not lack confidence and dealt with these issues by persisting in her interactions, seeking to learn more about the personalities on the staff, asking her colleagues about their daily challenges, and continually trying to find ways she could support them. When asked if this kind of service could be seen as “equity building” (investing in people so that when the time came to ask them to participate more fully they might be open to it), Charlotte responded:

... that must have come from one of those little “wordsmithy people”. But I don’t know, I guess I look at it a little differently. I mean that equity stuff sounds a little calculated. I didn’t go in there thinking necessarily that I have to get them on my side; it was very much - I really don’t know what I’m doing here, and they don’t know what I’m doing here, so let’s just get to know each other. (Charlotte)

For Charlotte, it was about being authentic - not calculated. Charlotte continued: “And I was just excited because I got to play with grade threes and it was awesome.” This last quote also betrays another distinct characteristic of Charlotte; she was deeply involved in change processes because she needed to engage and enjoy. In fact, during her interviews, Charlotte often talked about “just going for it” and “having fun”; and she meant that - not only for the instructional coaches - but also for students and teachers. In this way, Charlotte approached her responsibilities to teachers a little differently than other instructional teacher leaders; she wanted to improve teacher practice and student achievement but she also wanted to see teachers who enjoyed their job and made this one of her priorities.

Charlotte had much to contribute when she reflected on the nature of instructional teacher leadership. Of all the teacher leaders interviewed, she was the most frustrated with the tension between wanting to be a friend and a colleague and needing to provide hard feedback to those still implementing ineffective instructional practices. Charlotte cited examples where teachers used the same old yellowed worksheets from binders assembled

decades before. She said there were just too many teachers who simply taught in one-size-fits-all ways— insensitive to the learning needs or individual interests in their classrooms. Charlotte saw the potential of a more collegial approach so often advocated in instructional coaching, but she also felt that instructional teacher leaders needed to be supported by administrators so there might be more accountability for dealing with weak teaching practices and more support for those who have been given the task of implementing instructional reform (people like Charlotte and other coaches, consultants and lead teachers). For Charlotte, the success of any reform depended upon clear communication between the district, schools, administration and teachers; upon a commitment and realistic understanding from administrators about the role and purpose of the instructional teacher leaders; and upon the development of a culture within the schools based upon shared leadership, professional collaboration, and a commitment to the process and the reform itself.

Catherine (2) – District Instructional Coach/AISI Coordinator

Catherine was unique among the ten instructional leaders interviewed because she had a more supervisory role. Although she had experience in both school-based and district-based instructional teacher leadership work, her primary role in the last few years of AISI was providing leadership to a team of instructional teacher leaders (district instructional coaches) and advocating for instructional change at the district and provincial level (as the district AISI coordinator). This role meant working closely with principals in much the same way as her coaches were working with teachers. Catherine had to help administrators understand the pedagogical changes proposed, identify candidates who might work with the coaches, and help principals harness the power of the change to transform education in their building. What further complicated her work was that Catherine was also expected to work with individual teachers as an instructional coach. Like a teaching principal who must split time between administration and regular classroom work; Catherine needed to split her time between management (budgeting, communication, mentorship, advocacy, etc.) and taking on a more hands-on role in working with the teachers.

At the time of the interviews, Catherine was a teacher with twenty-two years of experience who transitioned into instructional teacher leadership through a gradual process. Her initial teaching experiences were in teaching Kindergarten and elementary Physical Education. As an outspoken advocate for effective practices in teaching Kindergarten, Catherine found herself sharing her ideas with other early childhood teachers and presenting at conferences and on in-service days. Eventually she joined the district “early childhood crew” (as she called it) and, when a position came open to coordinate the AISI team and project, Catherine applied and was appointed. As she acknowledged, it was a steep learning curve because she joined the AISI team six months into the year and at the tail end of a project. In addition, she did not have the same training that many instructional coaches had; and she would be expected to lead them. Catherine would have to learn how to be a coach, advocate, and administrator while she was on the job. As such, Catherine often provided unique insights in her interviews; especially when it came to negotiating roles or navigating between different worlds (classroom, school, central services, and provincial agencies and authorities). Although she had many managerial responsibilities related to finances and reporting, Catherine was still primarily an instructional teacher leader (as opposed to an administrative one); she could only advocate for and encourage change, she could not compel principals or teachers to take on these changes.

“I knew that instructional teacher leadership was for me.” When Catherine discussed her motivation to take on instructional teacher leadership roles, she intimated that it was connected to a passion for learning (both personally and collectively) and a need to see change. Early in her career Catherine knew she would be “more” than a classroom teacher: “I knew fairly early, when I was still at the school level, when I was teaching others about instructional change, project work, and leading in the division in Physical Education and doing lots of PD presentations in the division and through the province.” Catherine caught the improvement bug through district networks and her presentations on ECS at teacher’s conventions. But for Catherine it was never about the glory (as she put it); it was about making a difference for students and teachers—and she could relate many examples

where she was involved in making changes that could not be traced back to her team or to her directly; and, for her, that was fine.

In her dual role as AISI coordinator and as an instructional coach, Catherine was often placed in circumstances where she had to carefully negotiate her role. This negotiation happened both at the school and district level. In the schools, some teachers were quick to identify her as a central office person and could feel intimidated or even threatened by her presence; the spectre of evaluation was always present. Moreover, by her own admission, there were times Catherine had keep her supervisory instincts in check and remind herself that, as a coach, she was not there to direct or judge; only to encourage and support. In addition to dealing with reluctant or resistant teachers and principals, one professional challenge Catherine experienced was working with high school teachers (content experts) while having classroom experience primarily in early childhood education. Another challenge was in defending district and provincial initiatives (as a district coordinator) while at the same time trying to build collegiality with rank and file teachers (as an instructional coach).

Working with teachers at the school level was only one part of Catherine's job. The other parts were coordinating the project, communicating the vision, advocating for time and support, mentoring her team, and working with school administrators. Of these responsibilities, the one Catherine drew most attention to as a challenge was working with school administrators. While most principals were supportive and ready to step up when it came to new initiatives, Catherine could also relate examples of principals and assistant principals who were ill-informed, disinterested, skeptical, and, in one case, suspicious and spiteful. Many of Catherine's examples from her challenging and often thorny work with these school leaders paralleled the delicate work done by the other instructional teacher leaders when they worked with their individual teachers. Catherine's stories contained lessons about diplomacy, perseverance, and relationship building.

As someone who had practiced instructional teacher leadership as a teacher, a school-based teacher leader, a district teacher leader, and as an improvement coordinator, Catherine had many insights to share about school improvement and the role of the

instructional teacher leader. Some of the themes that emerged from Catherine's reflections on effective instructional leadership include:

- giving principals and teachers a choice throughout the process and adapting approaches as the relationship and work evolves;
- using a "third point" when addressing issues or discussing how to meet goals; [This third point could be the goals of the project, an article or video example of an effective practice, or classroom data in the form of student assessments or videotaped interactions with the students. Having a "third point" kept collaborative work from devolving into an opinion-based discussion.]
- working hand-in-hand with a well-informed administrative team; and,
- focusing on student progress rather than on flashy projects or sharing just for the sake of sharing.

At the time of her interview, with the recent demise of AISI, Catherine was considering leadership at the school level but acknowledged that she would miss being an instructional teacher leader and an advocate for effective practices at the district level:

You know, I was used to being the idea person, the big picture person, the re-imaginer of education for our division. That was my role. And now I don't know my role is. And I will miss that. I loved being the re-imaginer for our district. So now that AISI is gone and that opportunity is no longer there for me I look at school-based administration as being able to do at least some of that. (Catherine)

Later she continued her lament:

I don't want to be lost in a classroom or lost in a particular school... I know I can add value there but I feel that I have a background and interest that needs to be shared and I don't want to be buried in a rural school in a small classroom. That's not what I want to do. So I chose to join an admin team in a large high school as a counselor so I could still be part of the decision-making. I need to be part of that big picture decision-making. (Catherine)

Catherine spoke directly to what had become an issue for many instructional teacher leaders in this study; they were no longer satisfied going back to the limited confines of one classroom or one school. Their pedagogical and professional horizons had been expanded and they felt they needed to keep exploring.

Caroline (3) – Learning Coach

At the time of her interview, Caroline was a teacher leader with nine years of experience teaching in small rural schools. This experience gave Caroline the opportunity to teach a wide variety of courses at the secondary level (mostly math and science). From her interviews, it was easy to discern that Caroline had a deep empathy for students and was willing to make many accommodations and adjustments to help them succeed. Caroline taught many split classes and would often help students gain more credits by allowing them to work on distance learning courses in her classroom and by providing support and feedback to them as they did so. Moreover, Caroline was an advocate for her students; she sought to provide them with the same kind of opportunities afforded in much larger urban schools. As Caroline put it, one of her “faults” as a classroom teacher was that she always saw past the narrow confines of the classroom and instead looked for potential school-wide and district-wide programs to cultivate student engagement, leadership and lifelong learning. At the time of the interviews, Caroline had already earned Master’s in Educational Studies and Leadership for School Improvement.

Caroline moved into teacher leadership gradually, becoming involved with AISI early in her career by taking lead roles in the school for their literacy and numeracy projects. During her time as an AISI lead teacher, Caroline’s school went through many administrative changes— seven principals in five years, in fact. But for Caroline, the lead teacher role was limited. There was no assigned time associated with the lead teacher role and it was difficult to gain traction or momentum in the school improvement areas with such administrative turnover. However, Caroline faithfully attended district meetings and tried her best to provide information and support to her colleagues at school. She was also encouraged by her school administrative team to take leadership training offered by the district; training in cognitive coaching and in instructional coaching. Caroline also made many connections with the district learning team who recognized her interest and invited her to apply for a full-time teacher leadership position (learning coach) at the district level. For Caroline it was a natural progression, building on her training in a variety of educational topics and her desire to work across classrooms and schools.

I have this tremendous desire for wanting answers. I am relentless. I wouldn't say that I am a good schmoozer though. I think I can do some consensus building with staff, but I can also put people off a little bit because I am passionate. It really depends on who I'm working with. (Caroline)

Caroline's most recent teacher leadership role was as a learning coach, working with four teachers in two different schools. She described herself as relentless, persevering, passionate, articulate, but not as an especially quick thinker. Caroline said that she needed time to process and that she was a much better writer than off-the-cuff speaker. In talking about her work and the adjustment to a learning coach role, Caroline said that one of her biggest challenges was redefining her role at the school where she recently taught, and in learning how to let go of programs and duties she had been so invested in. For Caroline and the teachers she worked with, the work took the form of collaborative planning or reflective conversations, side-by-side work in the classroom with the students, modelling, and some data collection. According to Caroline, she experienced the most success when she worked side-by-side, one-on-one with her teachers:

And the side-by-side piece looked different on each day; it may have been just quick conversations with each other, it may have been team teaching, it may have been modeling or just inserting a piece, or it may have been just being available and saying: "I want to try out this strategy; what do you think?" For those teachers, they knew that we were in the trenches with them. And so I think it elevated them more into the open to being a risk taker, because they knew there was someone right there with them, taking risks with them. They shared a lived experience. There was shared risk-taking, shared vulnerability. (Caroline)

In her interviews, Caroline portrayed her teachers as the real experts (in content and grade level) and said that her job was to bring fresh perspectives and approaches. Caroline downplayed her expertise and saw herself as a co-learner; she was learning the realities about effective practice from and with her teachers.

Like others on her district's team of learning coaches, Caroline experienced challenges operationalizing the project. When the project rolled out there were funding cutbacks so learning coaches were assigned tasks normally outside their coaching roles. Specifically, they were tasked with overseeing the administration of a comprehensive literacy assessment. This responsibility—and the accountability and oversight associated with it—caused issues for the coaches: they were expected to support and reassure

coaches who took risks and showed vulnerability; at the same time, they were central office administrators with firm expectations and deadlines. It was not an easy balancing job. Caroline dealt with this challenge by trying to serve both as a learning coach and as an assessment administrator. She tailored her support to the buildings she was in and to the teachers she was working with. In one school, where teachers were more supportive and innovative, she worked collaboratively with her teachers in public places and tried to generate interest by answering questions and providing support to teachers who were not assigned to her. In the other school, Caroline was aware that risk-taking was not celebrated and that the two teachers assigned to work with her needed to work in the safe confines of their own classrooms to develop confidence before rolling out what they were doing with the rest of the staff. Caroline attributes context, and her recognition of particular contexts, as a major factor in the success or failure of the work she and her teachers did.

If Caroline were to give advice to a new teacher leader, it would be to remember that “everybody has their own stuff going on”. Caroline used this phrase repeatedly and it dovetailed with her emphasis and acknowledgement of context. When Caroline recounted issues and roadblocks in working with her teachers, she would point out that she only knew her own perspective; she was a learning coach trying to facilitate change. If teachers were not ready to try new strategies, if they seemed resentful or disconnected, Caroline would remind herself that “everyone has their own stuff going on”. Some teachers may not have been at the right place in their career to incorporate major changes, some might have been dealing with family or health issues and some might have resented the learning coach for reasons that the coach had absolutely no control over (being passed over for the same position for instance). For Caroline, it was important to focus on the work and the big picture of slow growth and not to get caught up on perceived slights or bruised egos. It was important to let teachers work through the changes on their own time and in their own way, knowing that she was there to support and encourage.

Anne (4) Lead Teacher/Department Head

In June of 2013, Anne was an experienced secondary teacher with a Master’s degree in Language Arts Education and the English department head in a large urban school. Anne’s interest in action research and her continuing pursuit of professional improvement

eventually led her to take on a lead role in her school's AISI project. The project sought to understand why the English students from her school (and many others) seemed to have difficulty with the writing portion on provincially-mandated standardized exams. As such, Anne's work as an instructional leader had a much narrower scope than did many of the other instructional leaders.

Anne saw herself as a teacher first and foremost. She did not like the label "leader" even though she acknowledged that, as a department head and as a project leader, she did provide leadership. At one point in her career Anne had considered school administration or district consultant work, but she quickly dismissed this. While teaching has its share of frustrations and drudge work (that many of the other teacher leaders were glad to leave behind), Anne loved the connections she made with her students and she did not want to give that up. Anne found the classroom to be her safe haven away from the power and politics that permeated school or district administration.

For Anne, the most powerful part of being an instructional leader was the opportunity to share classroom success stories and learn from her colleagues. In tackling the issue related to student achievement on standardized tests, Anne engaged the teachers in her department in action research; trying out new approaches and modifying their instruction based upon what they had read and what they had learned from a learning consultant. There were opportunities to co-plan, analyze data, and engage in deep conversation but the work that Anne and her staff engaged in did not involve instructional coaching or classroom visits. Anne sensed that secondary teachers would not appreciate such an intrusion into their classrooms.

For Anne, instructional leadership was all about inviting and even coaxing others to engage in educational reforms. She took special care to respect the expertise and experience of her fellow language arts teachers but she also continually challenged them to improve their practice. According to Anne, this advocacy for change took vision, perseverance, and a great deal of "sneakiness". In fact, in her interviews Anne often described her leadership as being "sneaky leadership". Anne knew that she could just tell her staff the direction they would be going in, but to get real buy-in, she chose to be "sneaky" and let them feel like the idea was one that came from all of the staff - and not just

from her. Anne planted the idea for an improvement project around student achievement on written exams months before the call for proposals would happen. Then she engaged her staff in leading conversations, made a few “random” one-on-one visits, and encouraged other staff members to talk about the topic to resistant staff. Anne also used several timely opportunities to convince her administration and the district leadership to provide time and funding for this project (and that it was really their idea).

Well yeah, but we also have to have a few sort of like superintendent types, like I had to talk to them and tell them exactly what I wanted to do and show them how it would benefit and there was a little bit of convincing that had to go on. But, if you hit the right people with the right buzzwords, they will be interested and then they will be much more supportive or willing to sign that paper that makes you not go to that PD session. [So she could work on the project with her staff instead.] Or give you the money for the subs to do whatever. So you kind of have to know your audience, and figure out what will make them do what you want them to do. (Anne)

Anne’s perspective on teacher leadership was much simpler than most other teacher leaders. When asked to define instructional leadership Anne replied that it is “about being persuasive.” “You need to be able to persuade people that this is a good idea and that the benefits will be worth the small pains along the way, and that is pretty much it. If you can persuade them to just try it, it will take care of itself”. Anne’s point of view was refreshingly clean and reflected her experience. Her success could be attributed to the nature of the project, the teachers she worked with, and to Anne herself. The project Anne and her staff had chosen to work on had a direct impact upon the staff and the students and there were immediate and tangible confirmations of change. As well, only one staff member questioned and resisted, and even he eventually started making some adjustments. Moreover, Anne continued to lead this group, as she always had, by trying out the reforms in her own classroom first and by taking very public risks that did not go unnoticed.

Elizabeth (5) Lead Teacher

When we conducted her interview, Elizabeth was a teacher with fifteen years of experience teaching in smaller rural schools. Elizabeth was committed to her community and took pride in the fact that she knew most everyone in the two communities in which she had taught. Elizabeth knew who was related to whom and she went to school with

many of the parents of the children she was currently teaching. Elizabeth felt that her knowledge of the community gave her a more complete picture of her students; she understood their home situation, the expectations the children would be under, and how to get past any related roadblocks to learning.

Elizabeth's experience was primarily as a site-based instructional leader. She came to be an instructional leader early in her career when her school needed someone to take the lead on gifted and talented programming. Only in her second or third year of teaching, and with some trepidation, she took on this additional role. She found that she really enjoyed the role: "I loved it, because I had the answers. Like, if I had a question - not only did I have the access to find the answer, he [the principal] also gave me the power to go and find it. So my principal had the ultimate authority, but I was now allowed to ask the questions that I was not allowed to ask before." Elizabeth felt empowered; she now had the opportunity to learn more for herself but also to influence the practice of others in her school.

Since that time, Elizabeth had taken on a variety of instructional leadership roles in the schools she worked at. Through the work she did facilitating change through the three-year AISI cycles, Elizabeth became immersed in educational research and in learning about prevalent and current educational trends. AISI also afforded Elizabeth opportunities to take professional development from educational leaders like Jim Knight, Joellen Killian, Harvey Silver, Carol Ann Tomlinson, and Bob Marzano. Elizabeth was very grateful for all that the role of instructional leader brought to her in terms of education and experience and she was especially grateful to her first principal who recognized her potential and aptitude and encouraged her to venture outside of the world of her classroom.

As a site-based instructional leader, Elizabeth continued to teach most of the day; her leadership role was an add-on. She led professional development sessions at the school, worked with colleagues one-on-one, and championed initiatives in literacy, differentiated instruction, and assessment. Due to scheduling and time allotments, her school was blessed with ten site-based PD days per year in addition to nine division days. Much of Elizabeth's work was in: disseminating the research, highlighting strategies and approaches, modeling these same strategies, engaging her colleagues in professional conversations, and

facilitating professional reflection. Elizabeth did not practice side-by-side coaching in the way many other teacher leaders in this study did; her colleagues were not comfortable doing this. However, Elizabeth held herself and others accountable for change by asking for artifacts (student work, video recordings, and teacher reflections) that might provide evidence of instructional change. Elizabeth used these artifacts to take the professional conversations deeper and sometimes to challenge teachers for inconsistencies or incongruences between what these teachers professed they were doing and what the artifacts actually revealed.

Of all the teacher leaders in this study, Elizabeth was the most descriptive and detailed in her responses. She made specific references to educational research and researchers; she described multiple instances of success and frustration; and she shared numerous examples of relationships that were impacted by her advocacy and the response of her colleagues to the support and pressure she offered.

Mary (6) Learning Coach

When interviewed, Mary was a teacher with over twenty-five years of experience and she had been involved in school improvement projects (AISI) since its inception in 2000. Unlike many other teacher leaders, Mary did not go back to school and earn her Master's degree. Mary was somewhat apologetic about her "lack" of credentials but at the same time she stressed that leadership is not dependent upon degrees or certificates and that her lengthy experience as a practicing teacher seemed to give her a different, but equally valuable, type of credibility:

I think they [teacher leaders] have to be knowledgeable about whatever it is that you are working on; whatever the topic is, whatever the focus is. So probably they would have to be quite involved in professional development, or in current trends or research. And that can be from schooling or from PD. Being not schooled beyond my B. Ed., I know that it is not the only way to be trained; to be prepared for such a role. I think that being out there in the classes with the children, with the teachers, is an experience that teachers just can't get from books and, you know, that you just can't get from schooling.
(Mary)

Like others on her team, Mary was provided with training by her school division; training in cognitive coaching and instructional coaching as well as in the improvement topics and themes.

I was always very enthusiastic about those things. I felt compelled, and I was also filled with professional obligation to stay educated, to stay involved, to see what was out there and see what the possibilities were. What can change and what can be done better? And what the research is telling us? And so I stepped up into those things because I felt I was energized by it. (Mary)

Mary's transition into teacher leadership was not an overnight experience; she slowly grew into the role as she took on more responsibilities in her school. As the quote above reveals, Mary was passionate about teaching and learning and energized by the opportunities to get involved but she also felt a sense of obligation; not necessarily to the school or to her fellow teachers - but to the students. In her interviews Mary always came back to the students and how she and her colleagues engaged and supported them.

Mary found her first few AISI roles (as a lead teacher) to be somewhat frustrating. She would leave the school to learn new strategies and then be expected to share these strategies with the rest of the staff at staff meetings. There was no assigned time for classroom visits, or no time for extended conversations or for collaborative planning. Teachers would be pleasant and polite, but there was no real evidence of change anywhere in the building other than in her classroom. Mary felt "selfish"; she felt like she was learning a great deal but she was not really fulfilling her mandate as a lead teacher. So Mary was surprised when the directors at district office encouraged her to apply for one of the full-time instructional coach positions. It was the first time she had ever considered leaving the classroom (she had always rebuffed school administration), but this position seemed like a natural fit. Now she would be given the time, the funding, and the model that would allow her to take what she had learned through professional development into more than just her classroom. The instructional coaching role would allow her to implement pedagogical change more effectively than the lead teacher role had.

Like several others in this study, Mary worked in two different schools and was matched with two teachers from each school. According to the school improvement plan,

partner teachers were to be volunteers; they were also supposed to be experienced, successful, and reflective teachers who were ready to implement changes that brought about increased student engagement and improved achievement. However, not every partner teacher actually volunteered; some were coerced by their administration for a variety of reasons. This coercion made it challenging for Mary and some of the other instructional coaches. Being cognizant of each teacher's motivations for getting involved, Mary tried to be sensitive in how she supported them. She did not rush into side-by-side coaching and instead chose support models that the teachers were more comfortable with. With her partner teachers, Mary spent most of her time just observing lessons and the responses of the students to these lessons. Then she would sit down with her partner teachers and talk about what had taken place.

When asked about the changes and the challenges associated with the new role of full-time coach, Mary acknowledged that the first few months were quite difficult. While other teacher leaders would mention the fact that they missed the daily interaction with “their kids” and the connections to a school community, Mary's uneasiness came from another source. She always assumed that her colleagues were as committed to planning and professional development in the same way she had always been— but she soon found out that this was not the case. She was shocked to find that many teachers could show little or no evidence of planning and that it was difficult to get her junior high partner teacher enthused “about something, or **anything** really.” Mary's enthusiasm and her commitment to the project and to the students resulted in several difficult interactions with her cooperating teachers and with a school administrator. However, Mary persevered and managed to negotiate her way through these issues and, in the end, maintained healthy relationships with these same people.

In reflecting on her experiences as a teacher leader, Mary attributed her success to her service orientation. She built trust by finding ways to be useful to her teachers and by showing that she understood just how busy their lives can be. She said that “sometimes you can be a gopher” (a handy helper) as long as it builds some kind of equity with the teacher. If you help a teacher at a critical time, then that teacher will be more open to engaging in professional conversations or collaborations at a later time. That said, Mary acknowledged

times when she had to clarify her role. She was not just an extra body who could take students in the hallway to do remedial work; she was there to innovative work with teachers for the benefit of the students.

Maria (7) Lead Teacher

Maria was one of the three instructional teacher leaders who took on an “AISI Lead Teacher” role at their school. At the time of her interview, she had twenty-two years of teaching experience and had earned a master’s degree in teacher leadership through online and face-to-face learning. Maria was one of the quickest interviews of the ten participants. Throughout all four interviews, Maria gave succinct, clear, and direct answers. These answers also reflected her approach to teacher leadership, to relationship building, and to school improvement in general. Keep it simple. Clarify the goal, get to know your people, and then provide them with support and follow-up regularly. For three years Maria led an educational reform at her K-9 school. The initiative called for teachers to incorporate new practices and approaches related to inquiry learning and critical thinking into their teaching practice. Maria was quite comfortable taking on this role because, very early on in her teaching career, she was already working with teachers to examine their practices—when she was a special education leader in her school. In addition, she had been working at her K-9 school for a number of years and was well-respected by the staff.

While Maria was “nudged” into leadership roles early on in her career, and had been encouraged by one administrator to pursue her studies in leadership, Maria also made conscious choices to take on these roles. She liked the networking aspect, the opportunities to learn and the chance to influence more than just her own classroom. Of the ten instructional teacher leaders in this study, Maria seemed to have fewest challenges with resistant colleagues or with those who questioned the work they were engaged in. Maria attributed this to her context as much as to her expertise and training; the staff she worked with was receptive and valued her contributions.

As a lead teacher Maria was part of a district-wide cohort of experienced teachers who were expected to advocate for best practice in critical thinking at their respective schools for a district-wide initiative. This meant attending a two-day training session before the school year commenced and meeting with the rest of the cohort at regular

intervals through the year for day-long professional development and sharing sessions. Maria was given .3 FTE to champion this change at her school. She was also given time at the monthly staff meetings so that she could demonstrate particular strategies through “mini-lessons” and urge her colleagues to try new strategies and/or collaboratively plan with her at times that were convenient for both parties. After the three-year project was completed, Maria felt like her colleagues had made significant growth in this area and she pointed to an extensive collection of artifacts and lessons she had gathered from teachers involved in the inquiry initiative as evidence of this growth.

When asked if she had any difficulty negotiating her role or building a new identity, Maria replied that it was not a big issue for her. Taking on the lead teacher role did not significantly change her status in the school; she had always been respected as a hard-working and professional teacher so there was no jealousy or resentment. Any personal pressures upon Maria were caused by her teacher leadership role and had to do with her sense of responsibility to students in her own classroom. There were times when she felt guilty; her .3 AISI lead teacher position kept her out of her own classroom too much of the time.

In her reflections on teacher leadership, Maria made it clear that instructional teacher leaders and those who would support them needed to be ethical, transparent, and focused service and on project goals. She related cases where instructional teacher leaders, perhaps unwittingly, abused their roles by shutting themselves into offices, using their assigned time and resources ineffectively, and failing to be there for the teachers they were supposed to be helping. In these cases, teacher leaders actually had a negative impact upon school morale because the staff started questioning the use of funds and the inequity of work. Furthermore, Maria asserted that an administrative team needs to support their teacher leaders with time, funds, and advocacy. She related her experience when the administration of her school changed. After two years of having steady funding, regularly scheduled work time, and regular time on the staff meeting agenda, her role was significantly cut back and her funds disappeared into the general school budget. The experience left her frustrated and angry and she eventually chose to leave that school and take a teaching position elsewhere.

Jane (8) Learning Coach

Jane started her career in education as an educational assistant. After being encouraged by an administrator, Jane decided to go to university and earn a Bachelor of Education and then return to her own community and teach. At the time of her interview, Jane had been a full-time teacher for seven years. To Jane's way of thinking, she "kind of did things backwards". Nonetheless, Jane was encouraged to apply for a district learning leader position, perhaps partly due to her experience in a variety of educational roles. Jane's formal classroom experience was in teaching elementary grades, often to split classes, in small rural schools.

When she was asked how long she had considered herself to be an instructional teacher leader, Jane figured it to be about five years—from the time she took on a lead teacher role in her school for an AISI literacy initiative. The role did not include regularly scheduled work time, but it did allow her to book days off when she needed them to attend professional development and work on presentations to the staff. At that point, she was not involved in "elbow-to-elbow" coaching (as she put it), but she did work with individual teachers and tried to share what she had learned at district office and at regional consortia. For Jane, the opportunity to take on this role of lead teacher made quite an impact upon her: she could improve her own classroom practice, build relationships on staff, network with teachers from three other local schools, meet people from across the district, and feel like she was the "go-to person" at her site.

When the district started planning for another next cycle of AISI and began offering a training program for "learning leaders", Jane was encouraged to apply: "I think it's because I don't see those qualities in myself. It was other people around me, thank goodness, who see them in me." Initially she was hesitant about signing up, "And the people that encouraged me knew that about my nature. They knew I needed a little bit of a prod once in a while; I won't just stick myself out there unless I know that it is going to be a safe environment." This hesitation and a need for encouragement was a common theme in many of Jane's interview responses. More than a few times she acknowledged that she needed prodding and validation so she could proceed confidently with her work.

My biggest challenge is not having formalized requirements or parameters for my role. I would like clarity on what my expectations for my role should be and what I should do to fulfill my role. We are still sort of figuring out what the role of a learning coach is in our district. And that is a huge challenge because for three months I was the person who did this, and now I am not and people are still trying to access me. There is confusion.
(Jane)

More than any other instructional teacher leader, Jane struggled to find her leadership identity. She knew that each learning coach on the district team served schools in different ways and yet she always sought to find some kind of common mandate and method. So, Jane would go back to her directors to ask them to clarify her role and to let her know what the parameters were. Especially challenging for Jane was her adjustment in representing district office. Whether she agreed with her superiors or not, she felt she had to support all the district's initiatives; yet, she had to be "there" for her teachers. Cognizant of these conflicting loyalties, Jane felt like the social climate had changed in her school and teachers became careful to guard their words when she was around. It became a "personal thing" and something she brought home to her husband to have lengthy conversations about. Jane felt disconnected and she was not alone in this experience. Others on the learning team had similar experiences and it soon became part of their monthly meetings to discuss relational challenges and support in each other as they tried to make inroads into their respective schools.

Jane would track her work on Google Calendar so that she could see just how much of her time was spent working one-on-one with teachers, how much was spent in preparing for or following up on these interactions, and how much time was spent in district meetings or in attending professional development related to the project. Her directors stressed that most instructional coaches only 20% of their time was actually spent on coaching and they pushed their learning team to "flip this" and strive for being in the classroom working with teachers 80% of their time. None of the learning leaders could get close to this number and Jane estimated that she spent close to 40% of her time working side-by-side co-teaching or collaboratively planning with the partner teachers she was assigned to. The rest of her time was spent following up on other assigned district initiatives, attending meetings and professional development, and helping other teachers

who were not necessarily assigned to her. When Jane was coaching, she tended to do a lot of modeling. She and her partner teacher would agree on a particular strategy suggested by the literature or perhaps by a perceived need in the classroom and Jane would develop a lesson to model for the teacher. Afterwards, she and her partner teacher would reflect on the effectiveness of the strategy and what their next steps might be.

When asked to identify the most effective instructional leadership strategy (modeling, co-teaching, collaboratively planning, providing resources, etc.) Jane pointed to the need to celebrate success and acknowledge growth. Jane said that teachers needed to be shown where their practice was and that they needed help recognizing just how far they have come. She gave a number of examples, including one where a teacher had challenged his students to find many different uses for iPads and the teacher felt like he was not being all that successful. Then, when his students presented what they had learned, both the teacher and Jane could see the extent of the learning that had gone on through this inquiry process. For Jane, teacher leadership was all about validation; she felt that the teachers she worked with needed validation every bit as much as the students in the classroom did:

... if you don't take a moment to step back and take a look, you're just going to burn out. And you come to a place like that. You need to validate them and they need to validate themselves. And I think as teachers you need to do that; you need to help the students celebrate their own growth, they might not be where they need to be yet, but they need to celebrate their growth and getting to that point. (Jane)

Will (9) District Instructional Coach

At the time of this study, Will was a district level instructional coach in a large suburban school district. He had been a teacher for approximately twenty years and an instructional coach for four. Like several other teacher leaders in this study, Will did not have post-graduate training; he only had his Bachelor of Education. He took pride in being a secondary education special education teacher who knew what it was like “being in the trenches” and did not want to be seen as an “egghead or intellectual”. Will was encouraged to apply for a district instructional coaching position after being recognized for his classroom work and for his contributions to district professional development sessions. Will confessed that he was partially motivated to apply for district coaching positions by boredom and the sense that teaching was becoming routine. Will felt he had been

“stagnating” or “coasting” as a teacher for two or three years. But, although he was ready for the “next challenge”, Will had no interest in becoming a school administrator. In fact, at the time Will completely dismissed the possibility— he wanted to remain a teacher and not become a manager or bureaucrat. Becoming an instructional coach seemed like a logical step in his “professional evolution”; it would give him the best of both worlds (teaching and leadership).

Soon after joining the district team, Will became aware of the fact that there was much more to learn about teaching, and he was humbled by the knowledge and work ethic of some of his colleagues who were “research junkies” and who would spend all their free time preparing and researching to help their colleagues. In a few of his initial coaching interactions, he felt exposed and a bit like a “space invader”. He knew he did not have all the answers and he began to search for other ways to support his teachers through collaborative professional inquiry :“let’s find out the answers together!” It took his first two years as an instructional coach for Will to feel comfortable with his role and title and to gradually become an instructional teacher leader. Will was extremely thankful for the on-the-job training his director and coordinator provided in instructional coaching. As well, he gave much of the credit to his development as an instructional coach to his fellow coaches, and frequently came back to the notion that coaches also need to be part of a team. At the time of his interview, Will was preparing for the end of AISI and his eventual return to the classroom full-time. Based upon his four year experience as an instructional coach, Will was contemplating a return to the university to pursue a Master’s degree—he was also entertaining the prospect of becoming a school-based administrator.

At the time of the interview, Will had been involved in two AISI projects. In the first project, he was assigned to go to seven different schools and help teachers develop authentic learning tasks using a model developed by Carol Dweck. The team soon found that their drop-in approach was not very effective and started to bring along a substitute teacher so that they could free up time to work collaboratively while the classroom was covered. By the end of his four year stint as an instructional coach, Will had established a number of individuals and groups that he worked with on a regular basis – doing collaborative planning, trying experimental lessons out in the classroom, and reflecting

upon research and recent experiences in the classroom. He estimated that, for every day out in the schools, working with teachers and visiting classrooms, he and his colleagues would spend two days in the office; preparing materials, doing research for particular teachers, maintaining the district website as a support for teacher sharing, and engaged in other activities that helped move the improvement project forward. Although Will was a secondary teacher in training and experience, he worked with teachers from every grade level and found that, in general, elementary teachers were a little quicker to adopt new strategies and more open to collaboration. That said, he could point to a number of collaborations with high school teachers and department teams that were reflective and productive. When asked about the most successful coaching strategies for gaining a foothold in a school or a classroom and for making instructional changes that benefitted children, Will continually came back to the importance of being authentic, building relationships, taking risks together, and providing timely and practical suggestions and support materials. But, for Will, risk-taking was the key: “It was important for them to see that I was willing to put myself out there and to be the first to try the strategies. And I think that did a lot to build relationships.”

In contrast to some other instructional teacher leaders who struggled with the demands of leadership and the need to redefine their role and identity, Will found the experience liberating. It allowed him to give back to the community of teachers and make a difference in the district; it also allowed him to continue learning about his craft and to develop networks of educators that shared his commitment to effective change. Will said that his move to district-level coaching actually had a positive impact upon his family and his personal circumstances. He was no longer involved in repetitive mundane tasks (marking and report cards) and yet the new position allowed him to be in the classroom and regularly work with students and teachers. It provided a “fantastic learning opportunity” and he was thankful for being “PD’d to death”. Although Will could cite examples of resistant teachers and principals, these were not big stressors. Will and his colleagues did not waste time on those who were not interested; they only worked with volunteers. However, there were times early in the project when the team felt like it was

not making enough inroads and that some schools simply did not offer up any volunteers; and this could be somewhat stressful.

After four years of working as an instructional coach, Will had gained many insights into what worked and what did not when it comes to school improvement. In addition to his advice to remain authentic and to take shared risks, Will cautioned instructional leaders and the teachers they worked with to be reflective and to “respect the process”. He felt that too many professionals rush through the steps and try to get to the end product too fast. Like many strategies Will showed to the teachers, the learning is in actually working through the steps; the end product is just evidence of the learning - but it is not the real work. The same can be said for the work of the instructional coach; Will stressed the need to take time to build relationships, learn about the teacher’s world and their classroom issues. If the instructional coach jumped too quickly in offering suggestions and strategies without understanding the full context, they will have short-circuited the real work; the real learning. Will compared it to the teacher who gives students enough tricks to pass an exam, but not enough understanding to have continued success. Similarly, Will said that the real work of the instructional coach is not in just changing classroom practices by providing a few tricks and strategies, but helping teachers develop a “filter system” and professional judgement so they know why and how these strategies work.

Louisa (10) District Instructional Coach

Louisa was one of the younger teacher leaders who I interviewed. She came to teacher leadership early in her career when her principal and a colleague in her school approached her about sharing “lead teacher” duties in cycle three of AISI. These two people recognized that Louisa had the potential to be influential in the staff. She was passionate about education and students; she took careful risks (Louisa characterized herself as a “cautious early adopter”); and, she maintained good relationships with the rest of staff - taking an interest in her staff mates on a personal and professional level. Louisa said that she learned about instructional leadership from on-the-job training; attending timely workshops and continually reflecting upon her role as a change agent in her school. Louisa gave substantial credit to her fellow lead teacher (AISI Cycle 3) and her fellow instructional

coaches (Cycle 4 and 5). After becoming an instructional coach, Louisa began taking course work towards attaining a Master's Degree in Education.

When asked about her motivation to become an instructional teacher leader, Louisa shared an interesting oxymoron; she proclaimed herself to be “selfishly selfless”. Louisa explained this by saying that she enjoyed learning about educational reforms and strategies and was so excited by the changes that occurred in her own classroom as a result of implementing assessment for learning strategies that she just could not help but share her new learning with others. Rather than hoard her newfound knowledge like an instructional miser, Louisa gained satisfaction from “spreading the word” and sharing materials through websites, wikis and blogs.

But Louisa's selflessness only went so far. She confessed that there were times, in her career as an instructional coach, that she felt like she was disappearing:

... I didn't really own anything anymore. I mean I have great pride in my practice as a teacher and I saw a lot of improvements happening in my classroom in the few years that happened just before this job. And I felt good about that fact. I was happy because I took initiative and I learned and I tried and I made changes and I reflected. And I tried different things. And I engaged in discussions with colleagues and things were going really, really well. And I was proud of all that was happening because of my initiative and my decisions and the planning that I did for my students. So then I get into this coaching gig, and so then I have to do planning the teacher's way, if that makes sense. I mean I'm bringing some ideas but it is their stuff, their planning process, and they have ownership. It is for their students and they make the decisions. And that's in my work with teachers and then, here with the team when we were planning for the AISI conference or when we were planning to write reports or when we were figuring out a strategy to work with schools, I could never own any of that either. We did it all together. And it should have been that way, and all of our projects were better because we did collaborate, but I lost a sense of personal ownership, and to this day I still feel that loss. It's hard to, in this work, to find something that you can own. (Louisa)

Louisa's uneasiness illustrated an aspect of “servant leadership” seldom discussed. While she was valuing and validating the teachers she worked with and giving them ownership of the processes and the product, Louisa was actually working against her own “selfish” desires to be recognized, to fashion and create products on her own, and to feel a sense of accomplishment for something that she had done on her own. Sensing this, Louisa's director asked the instructional coaches to take on “pet projects” – presentations,

publications, websites, unit plans – to allow each of them to feel that sense of ownership and accomplishment.

Louisa was an instructional leader who had once been a school-based leader (lead teacher) and was currently a district-based leader (instructional coach). She provided noteworthy insights about the difference between the positions and the kinds of experiences she had in each position. Although she enjoyed being a lead teacher at the school level, she did not really feel like an instructional leader at that point; she still saw herself as a classroom teacher who had a few “perks”. She could go to workshops and share her discoveries with the rest of the staff. When she became a full-time instructional coach and moved to central office, Louisa felt like her role became clearer. As an instructional coach, Louisa worked with volunteers at various schools who were willing to go through cycles of coaching that included collaborative and individualized planning, implementation (modeling or co-teaching), and shared reflection. Unfortunately, it was not until the final year of AISI that Louisa (and the rest of the instructional coaches) felt that this coaching cycle was working to optimal success.

In her interviews, Louisa confessed that there were more than a few times, as both a lead teacher and as an instructional coach, when she was unsure of her role as an instructional leader and uncertain as to how she would be received. Louisa never used the phrase “imposter syndrome” but she did say that it took quite a while before she felt comfortable and confident in her role.

I think that if there was ever a transition to teacher leader cognitively, I would say it was in my second year of coaching. You know, after I got past that initial “What did I do when I took this job?” feeling. And then I kind of figured out what I was about and I learned that whole depersonalizing piece and figured out that I do have ideas to share and that I do have value, and that I could experience success and seeing the successes that the students already had in using some of the things that I had put forward. I think that maybe that was the point that I began to feel that I could help others in their pursuit of professional change or whatever. (Louisa)

In explaining to the “whole depersonalizing piece”, Louisa said that instructional teacher leaders have to learn to “let certain things go” especially when they meet with colleagues who are pre-occupied, bitter or rude:

... the thing that I think is important is the idea that I don't think you should take the baggage personally. It's not about you; it's about opinions that are formed long before

you met this person. It's hard lesson to learn but if you have it in mind it is a little bit easier when you get into these situations. (Louisa)

Yet, despite what the above quote may say, Louisa was one of the teacher leaders most aware of, and attuned to, the response of her colleagues. Her skin was not that thick. Louisa spoke of instances when conversations would abruptly change upon entering the staffroom and when certain teachers would simply brush her off and say that they had more important things to do. Louisa also shared instances when she felt she had “stepped over the line”, sharing feedback that was too direct and too blunt or when she inadvertently and unintentionally questioned a colleague’s practice. Her sensitivity may have caused Louisa to struggle with her identity more than other instructional leaders, but it also allowed her to recognize and deal with skepticism and frustration long before it became a larger problem.

Like some others, Louisa was looking at her upcoming return to the classroom with some trepidation. She relished the benefits accorded with being a district coach—the opportunities to read professional publications in the middle of the day, set your own schedule, visit multiple buildings, attend high-quality workshops and conferences, and “dive deep” into professional learning. She was also not looking forward to report cards, parent-teacher interviews, and many other classroom routines.

In reflecting upon her experience, Louisa maintained that her success as an instructional leader could be attributed to several character traits. Louisa was empathetic and showed a keen interest in those she worked with. She had an “absolute and enduring passion for learning” that seemed to be infectious. She constantly and consistently moved people to see the positive side of things and took pride in her “Polly-Annish”, “can-do” attitude. And she eventually developed a solid and in-depth understanding of the instructional focuses she was working on (assessment for learning, inquiry, etc.) as well as some skill in instructional coaching. Her advice to a prospective teacher leader can be summed up in two words: “be authentic”.

Appendix 4: Participant Consent Form

Examining the Experience and Role of the AISI Teacher Leader

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Background

Thank you for your interest in this research project on instructional teacher leadership. At this point we would like to invite you to participate as a subject for this multi-case study research. Your experience in leading for educational change through recent projects funded by the Alberta Initiative for School Improvement will provide valuable insights into the challenging role of the instructional change agent. The results of this research will be used in support of my doctoral dissertation studying the effect of the teacher leadership role upon educators. In addition, the experiences and insights you share may be used as material for a subsequent publication on the world of the instructional teacher leader.

Before agreeing to participate, we would like you to fully read over this consent form and understand the full implications of the study and your role in it.

Description and Purpose

With Alberta's current emphasis on school improvement, teachers have been challenged to become "teacher leaders" in their schools and school districts. Taking on roles such as instructional coach, lead teacher, or district consultant, these educators are implementing and in many cases, leading educational reforms by modeling and encouraging changes in pedagogy and practice. However, making the transition from working with children to working with adults can be difficult. Additional pressure results from the teacher leader's obligation to promote improvement while remaining collegial. Teacher leaders are not expected to direct but rather work alongside and support the staff.

This research inquiry will conduct case study research to determine:

How does the role of "Teacher Leader" affect educators who take on this role, and what can we learn from their experiences?

Related to this question are a number of others:

- How do teacher leaders adjust to their new contexts and roles?
- What challenges do these leaders face?
- How do these leaders overcome these challenges?
- What factors encourage and sustain teacher leaders through a change process?

- How do teacher leaders' experiences impact them personally and professionally?
- What lessons can we learn from the experiences of teacher leaders?

Study Procedures

Your name was selected from a list of volunteers (compiled from conference presentations and through professional networks). At this point we are asking a number of teacher leaders (approximately 20) to complete a questionnaire about their position, role and responsibilities as an Instructional Teacher Leader. This questionnaire should take no longer than 45 minutes to complete. If you have changed your mind and are no longer interested in participating in this research, please let me know and I will remove you from our mailing list. If you are interested in participating, please fill out the questionnaire and return it to me at jpkuntz@ualberta.ca. You will also need to scan a signed copy of the consent form and email a PDF of it to the same email address.

Based upon interest and the responses given, **a limited number of teacher leaders (between 5 and 7) will also be approached to partake in a series of semi-structured interviews** (4 interviews in total.). The teacher leaders chosen for these intensive, semi-structured interviews will be selected on the basis of experience, accessibility, and ability to complete the project work. Other considerations will include specific teacher leadership role (lead teacher, coach, consultant, etc.) and situation (rural, urban, suburban, elementary, secondary, etc.). Selected participants will include teacher leaders who feel they are experiencing success and fulfillment in the role and those who feel they are struggling, frustrated, or unsure of themselves.

The interviews will be conducted over a two month period at your convenience at a mutually acceptable venue. Interviews shall not last over an hour and each interview will be focused on a particular facet or dimension of teacher leadership. Although the interviews will follow a list of suggested questions, the interviews will allow for the inquiry and elaboration. Teacher leaders who go through the series of interviews may also be asked to participate in online correspondence to verify statements or provide elaboration. Your participation is completely voluntary and there is no penalty if you choose not to participate or choose to discontinue participation part way through the interview process.

Data collection (interviewing and correspondence) will take place from May of 2013 until August of 2013. All names in work published by the researchers will be pseudonyms. Interviews will be audio recorded and transcribed. If you feel uneasy about anything said in the interviews, you may request a copy of the audio transcripts to verify your responses. As well, I may contact you to verify certain statements or to ask you to elaborate on them. Quotes from the questionnaire and interviews may be used for publication of findings but no participant will be identified by name. Your participation will remain confidential (this means that I will conceal your identity and only codes will be used on interview forms and notes I take) except as required by law.

Benefits

For research and scholarship...

While there is extensive literature on the *importance* of teacher leaders and their role, few research studies have examined the *day-to-day experiences* of teacher leaders. A close examination of real life accounts should provide insight in how Instructional Teacher Leaders build relationships, establish trust, provide feedback, deal with skepticism, and sustain improvement initiatives. This research will prove valuable for teacher leadership candidates, teacher leadership trainers and those administrators who are planning instructional reforms that are dependent upon instructional teacher leadership for success.

Personal benefits...

Unfortunately, there will not be any monetary compensation for participating in this study. There are no foreseeable costs to you either. When the study is completed you will be given a copy of the final dissertation (in book or electronic form – your choice). The benefits of this study for you will be the knowledge that you have contributed to our understanding of a very important role in education. In addition, during your participation in this study, you may reflect on aspects of your own leadership, learn more about your growth and strength areas, and gain perspective on your experiences. The study may also provide an opportunity to promote teacher leadership within your school culture.

Risk

This research will involve minimal risk to you (less than or equal to that encountered in daily life at school). During the interview process you *may* feel uncomfortable when discussing your feelings about the school culture, or the challenges you have faced in leading for educational reform. If that should occur, you may discontinue participation, either temporarily or permanently. If you should feel there is a conflict of interest or if circumstances change during the research that may affect your willingness to continue being in the study, please let me know as soon as possible.

Voluntary Participation

Participation in this study is completely voluntary. Your choice of whether or not to participate will not influence your future relations with the University of Alberta. You will have the opportunity to pull out of the study (and withdraw your consent and data) at any point up until when the data is integrated into a cross-case analysis (hopefully around October of 2013). If you should choose to withdraw from the study, your data will be deleted from the secure hard drive on which it is stored and erased from the audio recordings.

Confidentiality & Anonymity

The data gathered through the paper/electronic questionnaire and through the interviews may be used in a variety of ways and formats. Your responses, anecdotes and reflections may provide evidence and support in my dissertation, as well as in related research articles and books, conference presentations, teacher workshops and teacher training, and possibly the development of an online website. In all of these cases you will not be personally identified.

All data will be kept confidential, only the researcher and research advisor (Dr. Parsons) will have access to the original transcripts and recordings. In addition, the Research Ethics Board always has the right to review study data, so the Research Ethics Board may access the data if there is a need to scrutinize the results. The original data (recordings and survey responses) will be kept on a secure computer drive for a minimum of 5 calendar years. All electronic data will be password-protected. All case study participants (those who are selected for interviews) will receive an electronic copy of the approved dissertation. Participants who would like to follow the research may contact me to receive further updates as the research in teacher leadership continues through subsequent research, publications and presentations.

Further Information

If you have any further questions regarding this study, please do not hesitate to contact me with questions:

Email: jpkuntz@ualberta.ca

Phone: 780 489 5572 (h) 7803996812 (c)

“The plan for this study has been reviewed for its adherence to ethical guidelines by a Research Ethics Board at the University of Alberta. For questions regarding participant rights and ethical conduct of research, contact the Research Ethics Office at (780) 492-2615.”

Consent

Your signature below indicates that you have read the information in this document and consent form and have had a chance to ask any questions you have about the study. Your signature also indicates that you agree to participate in the study and have been told that you can change your mind and withdraw your consent to participate at any time. Your signature also indicates that you consent to the use of audio recording and understand how the recordings, transcripts and related correspondence will be used for this study.

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- I have read and understood the contents of this information and consent form for this research study on Instructional Teacher Leadership.
 - I agree to participate in the Leadership Questionnaire and, if selected, the Leadership Interviews
 - I give permission for Jeff Kuntz and Jim Parsons to use the data collected.
 - I understand that I may withdraw from the study at any point up till the data is cross-referenced.
 - I understand that by signing this consent form I am not giving up any of my legal rights.

Name of Participant (please print): _____

Signature of Participant: _____

Date: _____

- It is suggested that you keep a copy of this consent form for your records.

