TEACHER LEADER AS BOUNDARY CROSSEER: NEGOTIATING HYBRID ROLES BETWEEN
AND WITHIN SCHOOL COMMUNITIES OF PRACTICE

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A DISSERTATION

in

Educational and Organizational Leadership

Presented to the Faculties of the University of Pennsylvania

in

Partial Fulfillment of the Requirements for the
Degree of Doctor of Education

2016

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Dedication page

To the many teachers with whom I have had the privilege to work, to learn, to lead.
ACKNOWLEDGMENT

I would like to thank Dr. Frances Rust, a critical thought partner in shaping this work, for her generosity of time, talent, and spirit. I would also like to thank Dr. Laura Desimone and Dr. Frank Grossman for their continued support, feedback, and expertise as I shaped this research. I want to thank the amazing individuals who opened up their classrooms and leadership spaces to me. I will forever be grateful for having had the privilege to hear your stories and see teacher leadership in action in your settings. I am deeply grateful to the members of Mid-Career Cohort 12. I am forever changed for the better as a result of having taken this journey with you. Your constant support, deep and thoughtful conversation, comradery and care have made me both a better teacher and a better leader. I want to thank my son, Billy, for the hugs and words of encouragement along the way, and for his patience. Now, it’s your turn, Billy. And finally, to my incredible and patient husband without whose support this journey would not have been possible. To Bill—my sounding board, my cheerleader, my critical friend—thank you for encouraging me and for loving me every step of the way.
ABSTRACT

TEACHER LEADER AS BOUNDARY CROSSER: NEGOTIATING HYBRID ROLES BETWEEN AND WITHIN SCHOOL COMMUNITIES OF PRACTICE

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Frances Rust

This qualitative case study explored how eight secondary public school teachers experience formal leadership positions in addition to classroom responsibilities. The study’s questions examined how these hybrid teacher leader (HTL) roles influenced participants’ descriptions of themselves as leaders and their leadership, as well as how they negotiated these dual roles. The study also investigated participants’ reported influences on their decisions to serve and potentially remain in hybrid leadership. Participants were recruited from two large unionized public schools in the northeastern United States: one urban, one suburban. Data included individual and group interviews with HTLs and their administrator and teacher role partners in these settings. Additional data included work-shadowing observations of participants, documents related to each school context and to HTL participants’ leadership responsibilities, such as: job descriptions, meeting agendas, and faculty and administrator communications. Study data revealed HTLs in these settings came to their positions influenced by agency development and activist motivations consistent with Wenger’s (1998) boundary identity trajectory. HTL participants’ formal positions located them both within and between teacher and school leadership communities of practice influenced by local, as well as institutional union and school reform contexts. This “middle” positioning both enabled and constrained participants as initiators of instructional improvements, implementers of district or state reforms, and advocates for within school constituencies. As boundary crossers, HTLs described fulfilling these roles by navigating continuities and discontinuities between teacher boundaries and administrative peripheries in ways that preserve their legitimacy to influence both groups. As a result, study data suggested that advocacy is a critical element of their leadership practice. HTLs cited feelings of agency and self-efficacy in
leadership, in addition to continued self-efficacy in fulfilling teaching responsibilities, as influences on their potential tenure in hybrid roles. Study findings have implications for how school systems might support and expand formal teacher leadership roles to effect improved student outcomes. Study findings also have implications for the preparation, support, and development of teachers in hybrid leadership roles.
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CHAPTER 1: Introduction

Until several years ago when my administration became involved in a shared leadership initiative in partnership with a local university, I had never even heard the term teacher leadership, nor would I have intentionally used that term to refer to any part of my practice. At that time, the District formed a leadership team of volunteers from all strata of the organization—central office and building administrators, school support staff, and faculty—to collaborate on setting and implementing school improvement goals. Over the next two years as a volunteer on the team, I saw real changes take place in multiple classrooms and in school support programs for students and teachers that resulted from these team collaborations. In consequence, I began thinking differently about teachers’ roles in driving change from within, not outside, the classroom.

The shared leadership team dissolved after only two years with the hiring of new central office leadership and the repositioning of secondary-level building administration. While the team itself no longer met formally, the new administration instated a new position that year changing the name of the position of secondary content area Department Head to Teacher Leader. The new title suggested the shared leadership work would continue, perhaps through more formal pathways for involvement in school decision-making. At the elementary schools, where there had been no formal leadership positions, this change represented a new opportunity for teachers.

I had served as a Department Head for several years and continued as Teacher Leader during the role’s transition. However, after serving the next four years in this position, I had not experienced significant changes in either my responsibilities or in how the role was viewed or utilized by administrators. Despite now having a title that suggested collaboration, I struggled to have our department’s voices heard in school leadership decisions. I struggled to see myself as a teacher leader. This experience caused me to question whether I was alone in these struggles, especially when I examined my experience in the context of recent teacher leadership literature that suggests that the role of the teacher in school improvement efforts is evolving. Together, my
teacher leadership experience and issues raised in the literature provided a compelling lens through which to consider how teachers outside my own setting experience and are influenced by new roles in schools.

Beginning in the 1980s and continuing through the late 1990s, a wave of whole-school reforms caused a “proliferation of teacher leadership roles designed to meet steadily escalating accountability demands” (Little, 2003, p. 401). As a result, teacher leadership and teacher leader roles have become increasingly prominent in reform agendas as “a catalyst for school improvement” (Hallinger & Heck, 2010, p. 106). In fact, teacher leadership has been recognized as a “sleeping giant” (Katzenmeyer & Moller, 2009) that, if awakened, could help education systems do more with less. Recent research suggests that schools must re-organize to support a faculty’s capacity to work together and to “[enlist] teachers in . . . change efforts” as part of “a growing cadre of leaders” in “inclusive-facilitative leadership” models (Bryk, 2010, p. 25). In fact, Bryk (2010) argues that these models are “essential to advancing student achievement” (p. 25).

Accordingly, teacher leadership is increasingly written about in multiple ways: as instructional and school leadership (Farris-Berg, Dirkswager, & Junge, 2013), as a pathway to career advancement (District of Columbia Public Schools [DCPS], 2013), as a new hybrid role for teachers simultaneously serving within K-12 schools and universities or state agencies (Portin et al., 2009), as distributed leadership (Hallinger & Heck, 2009; Margolis & Huggins, 2012), and as means for school change with both the federal government and states initiating programs to support these expanded roles for teachers. The sleeping giant of teacher leadership is now stirring (Katzenmeyer & Moller, 2009). And as the giant stirs, it disturbs long-held conceptions of school leadership causing particular consequences for persons who now occupy an in-between space.

New formalized roles for teachers, much like the one I experienced in my own setting, are creating a “new leadership niche” (Margolis & Huggins, 2012, p. 955) where teachers “[sit] between the classroom and the school’s administrators, and to some extent between the classroom and the district or the state” (Portin et al., 2009, p. vi). And whereas “old niche” teacher
leadership roles often removed teachers from their own classrooms, these “new niche” teacher leadership roles enable teachers to work in the classroom while they lead beyond it (Margolis & Huggins, 2012, p. 955). However, reform strategies that hybridize the roles of classroom practitioners to include leadership often change the fundamental conceptions of teacher and school leader. Individuals serving in shared leadership structures must now determine where teacher leaders fit, not as administrators but alongside them, and similarly alongside but also responsible for teacher colleagues.

As Bryk (2010) argues, the organization of schools and the quality of instructional exchanges in classrooms are intricately connected: learning depends on the school’s social context. Bryk contends “leadership drives change” (p. 25) as an essential influence on the social relationships and cultures of schools. Thus, if teacher leadership is to be a catalyst that can improve schools, then Bryk’s research suggests that teachers must desire this kind of leadership work and must feel included in a culture of “shared responsibility for improvement” (p. 25). Teachers must see themselves as leaders within inclusive leadership structures.

Therefore, an investigation into teacher leadership roles and why teachers choose to serve in them becomes an important focus of inquiry that could inform policy and practice around school administration and change. Additionally, an examination of how teachers experience and are influenced by these new roles may provide insight into how teacher leaders negotiate a self-definition that challenges the old cognitive frames of teaching and leadership (Goldstein, 2004; Margolis & Huggins, 2012). To that end, this study focused on an investigation of teachers serving in hybridized roles.

**Research Questions**

Using qualitative methods, I explored the following questions and sub-questions:

1. How do secondary public school teachers serving in leadership positions experience these roles?

   (a) What contextual factors influence how these teachers experience their roles?
(b) How do these teachers describe their leadership?
(c) How do their roles influence the way these teachers describe their leadership?
(d) How do these teachers negotiate their dual roles as teachers and as leaders?

2. What factors influence secondary public school teachers' decisions to serve and potentially remain in leadership positions?

I selected secondary school teachers with at least six years of teaching experience who had served at least three years in formal leadership positions while maintaining classroom teaching schedules. Pilot research findings suggested that contextual factors were key influences on the leadership practice of teacher leader (TL) participants, including department structures of various sizes and make-up, number and type of courses available, teaching schedules, and size of the teacher cadre under a TL’s purview. Therefore, this investigation similarly focused on secondary environments as many of these factors are absent or look markedly different in elementary settings. An additional contextual factor was that secondary TL participants, licensed as specialists, rather than generalists, were asked to fill leadership positions that require negotiation not just between ranks of individuals, but also between multiple grades and content-area or course specialties outside their own instructional expertise. Data, supplied by these participants through semi-structured interviews, provided insights into their leadership role, its influences on them, and how they emerged as TLs.

Observations, or work-shadowing, of participants further informed this study’s questions, providing a close look into the actual practice of TLs within their settings as they negotiate their dual roles. In addition, document review of artifacts related to the TLs’ settings and leadership practices provided data about the contextual influences on their roles, as well as where these participants fit in their school leadership structures. Such information provided insights into how the positioning of teacher leaders influences them—how they see and understand themselves as leaders— their “mental models” of leadership (Goldstein, 2004; Margolis & Huggins, 2012; Mevorach & Strauss, 2012; Senge, 1990). Interviews with administrator and teacher role...
partners provided additional information about TLs’ practice, their school contexts, and how these formal roles are understood by those who work directly with TLs. Collectively, the study data could inform the ways in which school systems might influence and support teacher leadership as an instrument of education reform.

**Rationale and Significance**

When teachers are invited into new kinds of school leadership structures (DCPS, 2013; Farris-Berg et al., 2013; Portin et al., 2009), they and the adults with whom they work are called on to conceive of their roles differently because their work ostensibly becomes redefined (Margolis & Huggins, 2012; Goldstein, 2004). As Collay (2006) asserts, when teachers enter the profession they bring with them deeply-held beliefs about not only what teaching is, but also about what leadership is and who can do it. These long-standing beliefs tend to be influenced by the historical position teachers have held within school hierarchies. Accordingly, the “collective systemic consciousness of schools” creates “cognitive frames” in conflict with a flattened view of school leadership that attempts to accommodate teachers’ shaping the direction of the school (Margolis & Huggins, 2012, p. 977). School reform debates in the last two decades have hinged on discussion of how best to utilize teachers either formally or informally in positions of leadership. In order for these efforts to work, teachers and administrators need to accept that such roles have a place in schools. For that reason, these individuals must resolve tensions that arise between long-standing beliefs about teachers as followers and the expectations of TLs as now both follower and leader. They must renegotiate their professional or work-related identities in accord with their experiences as teachers turned teacher leaders, defining this in-between role internally.

Consequently, the teacher leadership literature suggests that beyond external structures that accommodate their roles, TLs need additional supports as they encounter obstacles that include role conflict and ambiguity, lack of perceived authority (both that of themselves and of others), as well as strained relationships with teacher colleagues and reactions to greater
responsibilities (Barth, 2013; Institute for Educational Leadership [IEL], 2001; Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004). Whether or not TLs are supported in managing these challenges has implications for how they enact and sustain their leadership of adult colleagues who are both peers and subordinates, and with adult super-ordinates who become peers. This study’s exploration into how TLs experience their roles provides insight into the sources of these teacher leadership challenges as they may be connected to the shifting self- and social-images of TLs when enacting their roles. Such insights could have implications for how school districts develop and support, and thereby, recruit and retain TLs in their settings.

This investigation into the ways in which TLs describe and experience their roles could inform development of a “leadership pedagogy” that can support current TLs, as well as prepare future TLs. As Collay (2006) suggests, graduate education could more carefully structure pedagogy so that “teacher leaders are supported to interpret their experiences as learners, teachers, and leaders” (p. 139). Teacher preparation programs may also benefit from findings related to how TLs negotiate and understand their dual roles as teachers and leaders as requiring skills and dispositions beyond those acquired in the classroom. Such programs can augment both undergraduate and graduate teacher development and teacher leadership curriculums with information necessary to prepare teachers for the roles they may take on in the future as part of their professional career trajectories. Finally, this research provides data to consider in setting policy for developing and supporting teacher leadership as a fundamental—and not ancillary—part of school structures.
CHAPTER 2: Literature Review

In this review, I first analyze the multiple definitions of teacher leadership present in the literature. Next, I trace how teacher leadership has been subject to shifting understandings of school leadership over at least four periods of the 20th and 21st centuries before exploring the implications of the most recent shift in conceptions of school leadership as relevant to teachers. Finally, the implications of changes in conceptions of school leadership for practitioners are explored regarding their impact on teachers now serving in leadership roles in their schools and their understandings of themselves as teacher leaders.

Defining Teacher Leadership

The research literature distinguishes between teacher leaders (TLs) and teacher leadership. Some scholars conceptualize teacher leadership as a set of behaviors or actions, a practice. They define the “what” of teacher’s leadership as including several key practices: building relationships, serving as a resource for other teachers, taking responsibility for school performance, using expertise to influence instructional improvements, creating a collaborative working environment, and gaining access to decision-making (Camburn, 2009; IEL, 2008; Muijs & Harris, 2007; York-Barr & Duke, 2004). While these descriptions of teacher leadership do not necessarily ignore individual characteristics, they do go further to provide language useful in operationalizing the concept of teacher leadership through observation of particular actions, behaviors, or interactions.

Other scholars designate the characteristics or qualities of TLs, describing “who” a teacher leader is and “why” this practitioner qualifies as teacher leader (Barth, 2001; Crowther, Kaagan, Ferguson, & Hann, 2002; Katzenmeyer & Moller, 2009; Sherrill, 1999). Still other studies delineate teacher leadership as a set of traits, qualifications, or characteristics of individual, expert teachers that include the following descriptors: talented, hardworking, motivated, collaborative, and enthusiastic (Camburn, 2009; Curtis, 2013; Danielson, 2007; LeBlanc &
Shades of distinction between teacher leadership and teacher leaders.

Multiple and often divergent definitions of teacher leadership abound in the literature. In their comprehensive literature review, York-Barr and Duke (2004) note that “very few authors provide a definition of teacher leadership” (p. 260); they find that most often it is used as an “umbrella term” to describe a “wide variety of work at multiple levels in the educational system” (p. 260) where TLs as classroom practitioners “hold a central position in the ways schools operate and in the core functions of teaching and learning” (p. 255). York-Barr and Duke offer the following definition of teacher leadership: “the process by which teachers individually or collectively influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement” (p. 288). “Shared influence,” not power, among TLs is emphasized by principals and teachers in an Institute for Educational Leadership (IEL, 2008) study. In their definition, Katzenmeyer and Moller (2009) also emphasize influence, but connect it directly to instructional practice: “Teachers lead within and beyond the classroom; identify with and contribute to communities of teachers, learners, and leaders; influence others toward improved educational practice; accept responsibility for achieving outcomes of their leadership” (p. 6).

A recent Aspen Institute report widens both of these definitions of teacher leadership to include: “specific roles and responsibilities that recognize the talents of the most effective teachers and deploy them in service of student learning, adult learning and collaboration, and school and system improvement” (Curtis, 2013, p. iii). The phrase “talents of the most effective teacher” evokes the qualification of “expertise” for TLs as cited in earlier definitions. Curtis’ (2013) definition also specifically widens the influence of teacher leadership to the school and the organizational or “system” level. Furthermore, Curtis’ definition includes another variable of teacher leadership, that of “role.”

Additionally, Curtis’ (2013) definition signifies formal TL positions but also leaves room for
the explanation of “responsibilities” filled through more informal means. Therefore, Curtis’
definition offers the more comprehensive definition for operationalizing the individual (“who”),
practice (“what”), and multiple contextual components (“school and system”) of teacher
leadership, and thus reveals an exigent shift in conceptions of educational leadership: from an
historical perspective of school leadership as the responsibility of individuals serving in particular
administrative roles (i.e., superintendent or principal) (Ogawa & Bossert, 1995) to views of school
leadership as more of a distributed phenomenon “stretched over” many people within a particular
place (Spillane, 2005).

The Rise of Teacher Leadership Amid Shifting Conceptions of Leadership

Leithwood and other researchers (Leithwood, Harris, & Hopkins, 2008; Leithwood &
Jantzi, 2006) recognize the importance that policy makers and many educators attribute to school
leadership. Yet, they believe the nature of that leadership “still remains much more of a black box
than we might like to think” (Leithwood & Jantzi, 2006, p. 202). Part of the difficulty in unlocking
the “black box” is that conceptualizations of leadership are often inconsistent and vague (Ogawa
& Bossert, 1995; York-Barr & Duke, 2004). However, as Ogawa and Bossert (1995) posit, four
basic assumptions seem to lie beneath most “treatments of leadership” and these represent four
dimensions of leadership: function, role, individual, and culture. These dimensions have roots in
four corresponding approaches to research on leadership identified by Yukl (1981): power
influence, behavior, trait, and situational. Yukl (1981) asserts that research focusing specifically
on one dimension over the others or failing to explicitly conceptualize (and then operationalize)
some form of an integrated approach results in a narrow view of leadership.

This circumscribed examination of the concept is exhibited in research approaches to
school leadership: they shift from an initial focus on the role and individual dimensions to a
subsequent focus on the function and culture dimensions that Ogawa & Bossert (1995) mention.
While a limited focus on the role of individual leaders, in particular administrative positions of
leadership, dominated the field of education leadership in much of the 20th century (Spillane,
Halverson, & Diamond, n.d., p.7, as cited in Murphy, 2005), 21st century investigations of school leadership have shifted toward broader sources of school leadership (Hartley, 2010, p. 97) or “distributed leadership”—a term often used interchangeably with shared, team, collaborative, participative, and democratic leadership (Crowther et al., 2002; Gronn, 2002; Hallinger & Heck, 2010; Harris, 2007; Spillane, 2005). These examinations address Yukl’s (1981) call for an integrated approach.

In particular, Spillane (2005), who describes distributed leadership as a “conceptual or diagnostic tool” for thinking about leadership, defines it as “a system of practice comprised of a collection of interacting components: leaders, followers, and situation” (p. 150). Accordingly, leadership is not just a set of individual attributes, but rather the interaction of these three component parts. Distributed leadership theory thus involves two dimensions: the “leader-plus” and “leadership as practice aspects” (Neumerski, 2013; Spillane, Healey, & Mesler Parise, 2009). The leader-plus aspect acknowledges that school leadership extends beyond the principal and administrator and involves multiple individuals in both formal and informal roles (Spillane et al., 2009). It is “stretched over” multiple individuals and, as practice, is a “product of the interactions among school leaders and followers as mediated by aspects of their situation” (Spillane et al., 2009, p. 409). In defining this duality inherent in leadership, Spillane’s (2005) concept integrates all of the research approaches (i.e., Ogawa & Bossert, 1995; Yukl, 1981) that call for an examination of how influence, behavior, and traits “interact with each other and [emphasis added] the situation to determine leadership effectiveness” (p. 9). What emerges is an understanding of distributed leadership as a theoretical framework that enables the broadening of the school leadership researcher’s field of vision to include how individuals with and without formal roles relate to each other and to the organization and suggests multiple leaders across the system: principal plus coaches, classroom teachers, coordinators—teacher leaders.

These changing conceptions of leadership, predominating during particular periods in this and the last century, parallel at least four variants in how teachers are figured as part of school leadership: (a) as head or “principal teacher,” (b) as divided from school leadership, (c) as formal
agent of school reform removed from the classroom, and (d) as classroom-connected participant in school or district decision-making. The last two variants, in particular, raise the visibility of teacher leadership as part of shared or distributed school leadership (Spillane, 2005).

**The first school leaders: teachers.** Lynch and Stodl (1991) highlight an endemic understanding associated with American educational leadership: “teaching is for teachers and leading is for administrators and managers of schools” (p. 2, as cited in Murphy, 2005). However, the idea of teachers becoming a part of leadership of schools is anything but new. Movements casting teachers as leaders date as far back as the period between 1910 and 1939 (Camburn, 2009) when the role of “head” or “principal” teacher became necessary (Rousmaniere, 2007; Kafka, 2009). There was a time in the history of school leadership when the “school was essentially the teacher” who “worked alone under broad administrative directives” of the superintendent or local school board (Rousmaniere, 2007, p.7). School leadership was in the hands of the teacher who “had worked as instructor and [emphasis added] building manager” in the one room schoolhouse (Rousmaniere, 2007, p. 7). Later, increased urbanization brought on by industry, manufacturing, and commerce caused the growth of schools, thereby requiring the oversight and control of many teachers in many classrooms.

According to Rousmaniere (2013) this role was inconsistently defined during its early iterations in ways reflecting “the growing pains of an emerging state school bureaucratic system” (para. 8). But, until approximately the 1930s, Rousmaniere asserts the position was held “as often [by] a teacher with administrative responsibilities as an administrator who supervised teachers” (para. 8). Interestingly, Rousmaniere (2013) also calls the first principals, “flexible teacher leaders [emphasis added] who maintained a close connection with classroom work and the school community” (para. 8), even though little of this work was connected to school improvement (Rousmaniere, 2007). Rather, their work was “based mostly on expediency, and not on the improvement of either learning or school operations” (Kafka, 2009, p.7). In fact, Kafka (2009), citing Fleming (n.d.), notes that “circumstance, rather than ambition, preparation, or talent' led to the identification of head teachers” (p. 7). Thereby, “untrained individuals” did the
work of the header teacher “on a piecemeal basis . . . before or after instruction” (Kafka, 2009, p. 8).

**Teachers divided from school leadership.** Bureaucratizing reforms of public school systems in the late 19th and early 20th centuries brought graded schools with supervisory personnel and standardized curriculum. At the same time, industrialization emphasized hierarchical institutional dynamics (Kaestle, 2011). As a result, leadership became associated with position (Crowther & Olsen, 1997, p. 6, as cited in Murphy, 2005), and the “head teacher” position became disconnected, even isolated from the classroom.

A change in the etymology of the title from “principal teacher” to “principal” reinforces this separation. As Rousmaniere (2013) explains, individuals who held the position became more separated from instructional responsibilities as state and local education systems “realigned the primary attention of the principal from the classroom to the central administrative structure,” thereby “[formalizing] the division between teachers and administrators” (para. 9). By the 1950s, the principal became closer to a Taylor-esque middle-manager whose duties encompassed far more than the oversight of pupils and curriculum (Kafka, 2009; Rousmaniere, 2007). Efforts to professionalize the position further reinforced the differences between teachers and principals. The addition of responsibilities for the supervision of teachers and “specified coursework in administration,” in combination with the continued requirement that those holding the position have teaching experience, placed principals at the center of school-level and instructional leadership (Kafka, 2009, pp. 10-11).

One critical result of this formal division was hierarchy. As Yarger and Lee (1994) suggest: “throughout most of the last century…leadership has been perceived to reside with school administrators where power flowed downward to teachers” (p. 226, as cited in Murphy, 2005, p. 5). Accordingly, in education the sense of the word leadership became more closely connected to the business world view of management of people rather than management of ideas, lessons, and curriculum. Leadership in schools became tacitly associated with the roles of principals and superintendents (Crowther, 1997, as cited in Murphy, 2005).
Conceptions of school leadership as individuals, roles, traits. Much of the 20th century leadership literature focused almost entirely on formal school leadership positions (Spillane et al., n.d., p. 7, as cited in Murphy, 2005, p. 6). This emphasis fueled views of leadership connecting administrators to school-wide leadership and teachers to classroom leadership (Clift, Johnson, Holland, & Veal, 1992, as cited in Murphy, 2005). Studies focused on the principal or superintendent as the subject offer a “heroic view” of school leadership and belief “profound [prevailing assumptions] that leadership equates with a position or role” (Ogawa & Bossert, 1995), the individual leader’s particular traits or behaviors. These assumptions could be connected to how the principal’s and teacher’s roles, the classroom and the administrative office, became separated and the principal became the political center of instructional leadership and school improvement.

Teachers as leaders in school improvement: three “policy moments.” The concept of teachers as connected to school leadership would not emerge significantly again until the 1980s when teacher leadership “formed the centerpiece of career ladder initiatives designed to reward accomplished teachers,” “[secure] their commitment to teaching,” and “[marshal] their expertise in support of new teachers” (Little, 2003, p. 401). During this decade, teacher leadership as a potential factor in school improvement gained “significant momentum” (York-Barr & Duke, 2004). The research literature articulates this period as the first of at least three shifts within the teacher leadership movement from the publication of A Nation at Risk (United States National Commission on Excellence in Education, 1983) to the present. Little (2003) recognizes each shift during these three periods as “policy moments,” stemming from the relationship she sees between each change and particular education policy or reform activity of the period.

involve teachers in school leadership during this time began as idiosyncratic, localized initiatives (p. 404). She describes the teacher leadership of this period as “rooted in individual initiative” and formal roles that kept the leadership practice of teachers close to their daily work within a grade or subject department: the “gaze” of teacher leadership was oriented toward the classroom (Little, 2003, p. 404). Such work usually involved only small-scale collaboration, the managing of administrative details such as budgeting, as well as the coordination of departmental resources and supplies (p. 405-406). Little’s study found only a modicum of administrative attention to the work of teachers in leadership positions; a “proactive and strategic stance toward teacher leadership was largely absent” (p. 406).

“Policy moment” two. Little’s (2003) second “policy moment” associates teacher leadership with instructional reform agendas, as well as with a proliferation of formal roles expanding teacher decision-making to program development. According to Murphy (1990), teacher leadership “initially rode into play on the back of various broad-based reform movements” (i.e., school-based management) (as cited in Murphy, 2005, p. 10). Barth (2001) explains that teacher leadership was a series of “critical elements in most models of site-based decision-making” and further describes the language surrounding the charter school movement during this period as “replete with phrases” that evoked the inclusion of teachers in school leadership, such as “empowerment of teachers,” “faculty participation in management,” “authority of teachers,” and “consensus management” (p. 444).

These same phrases are evidence of what Ogawa & Bossert (1995) remarked about conceptions of leadership at the time: that research on leadership by teachers and reforms aimed at empowering teachers potentially had turned away from a predominant view of leadership as sourced in an individual, or as a particular role (p. 241). By the mid-1990s, heroic views of leadership were giving way to a conception of leadership that “sees it everywhere” within organizations (Ogawa & Bossert, p. 241). During the same period and beyond, there was a “surge of interest” in distributed phenomena, such as distributed decision-making, shared or dispersed leadership, and distributed cognition (Gronn, 2002, p. 424). Thus, the early decade of
the new millennium marked a “giving way to horizontal information–sharing networks and collective decision-making” (IEL, 2001, p. 3). Smylie, Conley, and Marks (2003) note that this “flattening” of organizations called for a shift away from role-based leadership initiatives toward more “collective and task-oriented” approaches (p. 267) and can still be seen in the focus on the “collective” in the latest era of high-stakes accountability in the first decade of this century.

“Policy moment” three. According to Little (2003), the third “policy moment” in the evolution of teacher leadership traces developments into the beginning of the new millennium when “designated teacher leadership roles became heavily weighted toward institutional agendas” (p. 416) and “an established feature of reform” (Smylie et al., 2003). This period in the history of teacher leadership is marked by an intensification of TL expectations and collective responsibility for student success as central to expanded teacher roles (Little, 2003). These changes are credited in the literature to two “parallel forces” in operation: accountability and the standards movement (Ronan Herzog & Abernathy, 2011, p. 189). Sherrill (1999) attributes the emergence of new roles for TLs during this period to an emerging focus of educators and policy makers on improving teacher preparation, induction, and professional development (p. 221). At the same time, the teacher leadership literature of this period reveals a move away from classifying teacher leadership solely as formally appointed positions, such as department head, curriculum specialist, or subject coordinator (Muijs & Harris, 2007; Smylie et al., 2003), toward the inclusion of more informal leadership roles (Danielson, 2007). Newer conceptions of teacher leadership include informal leadership practice by way of authority and trust gained from the respect of others for a teacher’s expertise in instructional practice (Danielson, 2007; Muijs & Harris, 2007; York-Barr & Duke, 2004). This informal leadership focuses on the building of relationships around shared goals, collective responsibility, and social trust within micro-communities of teachers. As Coburn and Stein’s (2006) work suggests, these micro-communities become critical sites for policy implementation as they provide powerful sources of teacher learning and influence changes in practice.

A specific interest in the utilization of TLs during this time also coincides with recognition
that individual administrators cannot “do it all” (i.e., they cannot alone sustain the kinds of improvements necessary to meet the growing demands of high stakes accountability) (Danielson, 2007; Hallinger & Heck, 2009). Remarkably, this shift happens during a time in which the role and identity of the principal is “swept up in changes initiated by state and federal governments, legal requirements, and the increasing demands of local communities,” when the principal becomes an “administrator in the middle of an educational bureaucracy and not an educator in the middle of the school house” (Rousmaniere, 2013, para. 9). As Danielson (2007) suggests, the “demands of the modern principalship are practically impossible to meet;” a principal within a school system “can’t do it all” (p. 15). As a result, current research and practice calls for moving away from traditional administrative hierarchies towards distributed leadership models (Curtis, 2013; IEL, 2008). This call extends the “collective” approaches of the second “policy moment” in teacher leadership and marks the most recent change in conceptions of leadership that include teachers in a potential fourth “moment,” or as part of the current state of teacher leadership.

The current state of teacher leadership. While the research literature of the last thirty-years reveals an evolution in the notions of teacher leadership from separated toward included in school leadership and reform efforts, the most recent literature reveals two competing messages about the present “policy moment”: (a) the existence of an intractable status quo as traditional teacher roles still prevail despite “continual discussion” of distributing school leadership more broadly to include teachers (Ronan Herzog & Abernathy, 2011), and (b) the emergence of new roles for teachers that include them in decision-making at the school level and beyond.

An intractable status quo? Evidence in the literature suggests the current “policy moment” still reflects traditional, formal, one person school leadership roles (Barth, 2013; Feeney, 2009; Little, 2003; Ronan Herzog & Abernathy, 2011; York-Barr, 2004), and still excludes teachers from critical areas of decision-making in schools (Barth, 2013; IEL, 2008; York-Barr & Duke, 2004)—taking the leader out of teacher leadership. Teacher leadership, writes Barth (2013), has “never really materialized despite three decades of research” (p. 11). As Spillane
(2005) notes, the “heroics of the leadership genre persist,” despite an emphasis in the field to distribute leadership to teachers (p. 143). Even recent attempts to define teacher leadership focus narrowly on what Ogawa and Bossert (1995) would deem conventional conceptions of leadership as individual traits (“hardworking”) or role functions (behaviors such as “collaborate”) (Danielson, 2007; Harrison & Killion, 2007; Katzenmeyer & Moller, 2009) with the decision-making involvement of teachers still mainly focused at the classroom level rather than being drawn upon regarding education policy (IEL, 2008; Murphy, 2005).

_The emergence of a new movement?_ However, The MetLife Survey of the American Teacher: Challenges for School Leadership (Metropolitan Life Insurance Company [MetLife], 2013) shows that 51% of practitioners currently have a formal leadership role in their school, such as department chair, instructional resource, teacher mentor, or leadership team member (p. 49). Additionally, half of teachers surveyed are “interested” in a hybrid role that combines classroom teaching with other responsibilities. Twenty-three percent are “extremely or very interested” in teaching “part-time combined with other roles or responsibilities in their school or district” (p. 50). These numbers suggest that while teacher leadership roles exist, they may not be fulfilling their promise of improved professional development, collaboration, and collective responsibility—collective leadership—within the school accountability movement. The surveyed teachers’ desires to hold these kinds of roles while still occupying the classroom may be evidence that these roles have become an established part of professional reform conversations in some authentic ways but are not satisfying teacher or school leader expectations for how these opportunities could be influencing school improvement.

**New Models of Teacher Leadership**

In response to policy challenges, new models of teacher leadership are emerging around the implementation of standards for student learning and new initiatives for school re-organization and administration. A recent Aspen Institute report (Curtis, 2013) suggests “the Common Core State Standards give us a compelling reason and unequalled opportunity” to utilize teacher
leadership in implementation efforts (p. 1). Barth (2013) asserts that the “time is ripe, again” for teacher leadership to emerge (p. 10). Indeed, some district, state, national, and federal organizations have made efforts in the last few years to “codify, promote, and support teacher leadership as a vehicle to transform schools for the needs of the 21st century” (Teacher Leader Exploratory Consortium [TLEC], 2012, p. 16).

One such effort is the product of a national collaboration between teachers, administrators, education organizations, and state agencies that began in 2008 and resulted in the publication of the Teacher Leader Model Standards (TLMS) in 2012. The Standards outline seven domains describing the dimensions of teacher leadership which include: fostering a collaborative culture for educator improvement, using data for school improvement, communicating with parents and families, and advocating for students and the teaching profession (TLEC, 2012). Other efforts in schools and districts, to support the distribution of leadership to teachers have influenced the “emergence of new models of teacher leadership,” what Margolis and Huggins (2012) call a “new leadership niche” (p. 955).

As a Center for the Study of Teaching and Policy (Portin et al., 2009) report details, these new roles for teachers ask them to “[s]it between the classroom and the school’s administrators, and to some extent between the classroom and the district or the state” (p. vi). This new set of in-between roles includes, but is not limited to, the following activities:

- directing support of individual teachers,
- delivering of professional development to groups of teachers,
- coordinating and aligning curriculum and assessment, and
- communicating of particular visions for reform.

Whereas “old niche” teacher leadership roles, such as department chair or instructional coach were more managerial, or removed teachers from their own classrooms, these “new niche” teacher leadership roles are employed to keep teachers in the classroom while they lead beyond it (Margolis & Huggins, 2012). In fact, Margolis and Huggins (2012) argue that among school
leaders “it is becoming widely accepted” that school reform “will require teacher leaders who make their work public and engage themselves and their colleagues in classroom-based inquiry” (p. 953).

Some school systems, as well as non-profit organizations, are already providing avenues for teachers to have a voice in policies and decisions that affect students and the profession. Districts in Iowa, Colorado, Louisiana, and North Carolina are providing new roles for teacher leaders inside, as well as outside, more formal career ladder structures, such as: District of Columbia Public Schools’ (DCPS) Leadership Initiative for Teachers (LIFT), Charlotte-Mecklenburg’s Leadership for Educators’ Advanced Performance (LEAP), and the more widespread TAP (Teacher’s Advancing Professionally) model.

In DCPS, for example, a five-stage career advancement ladder provides leadership avenues for teachers who receive “effective” or “highly effective ratings” within the district’s teacher evaluation system. These potential positions include curriculum specialist, teacher recruiter and master educator. Some of the outlined roles in the LIFT Guidebook (DCPS, 2013) include “hybrid teacher leader roles” (HTL) (Margolis & Huggins, 2012), where teachers are part of shared leadership structures and provide input on policy decisions at the district or even the state or federal level. Teacher leaders may participate as administrative cabinet members informing the District Chancellor’s office or engaging in fellowship programs offered in cooperation with outside non-profit organizations. In these roles, teacher leaders continue their work in the classroom while they also serve “as local and national spokespeople for teachers’ ideas and perspectives” meeting “directly with leading policymakers to share teacher views and to present teacher-generated solutions” (DCPS, 2013, p. 32).

Similar fellowships are also offered to educators around the country through open application. Not for profit teacher voice organizations such as America Achieves, Hope Street Group, and Teach Plus offer these types of fellowships to “tap and build on the creativity and expertise of some of America’s most successful and promising educators” providing them “with a platform for sharing best practices, developing resources and tools, designing systems for scaling
effective school leadership, and giving voice to outstanding leaders in the national debate on education and policy” (Jamesliou, 2014, Fellowships for Outstanding Leaders, para. 2).

These private or statewide initiatives are not the only examples of current efforts to extend the leadership of teachers beyond the classroom. The Recognizing Educational Success, Professional Excellence, and Collaborative Teaching (R.E.S.P.E.C.T) Project, recently introduced by the United States Department of Education (USED) (2013), outlines a “new vision of teaching, leading, and learning” (p. 3) in which the teaching profession is transformed through seven “critical components.” One of these components includes the creation of a “culture of shared responsibility and leadership” through school structures of “shared decision-making and open-door practice.” The Department’s vision is that such structures enable principals and teachers to make “primary decisions” together, especially those that affect teaching and learning in schools. These decisions do not simply include those about student learning, but also include decisions about educator selection, evaluation, and career advancement (p. 5).

To summarize: the role of the teacher in the 21st Century is undergoing dynamic change once again. In fact, amid the latest changes in conceptions of school leadership this call for distributed or shared models utilizing teachers as leaders may be a potential return of Rousmaniere’s (2013) “flexible teacher leader” principal of auld—a circumstance of the demands on the modern principalship that necessitates a resurrection of leadership practice that is closer to the classroom and farther removed from the administrative office. As states, schools, and districts address Secretary Duncan’s (2014) call to “raise [and support] the visibility of teacher leadership throughout our nation” (The Teach to Lead initiative, para. 1), these systems will need willing teachers to take on such positions. Individual school systems will need to determine the policies and actions that would encourage a teacher to embrace new opportunities as agents. Furthermore, TL roles such as those promoted by Secretary Duncan—“genuine, authentic teacher leadership that [doesn't] require giving up a daily role in the classroom” (The Teach to Lead initiative, para. 6)—would necessitate that teachers negotiate a transition from teacher to teacher leader, in evolving from primarily classroom teachers to extending their reach beyond
their own spaces and into interaction with fellow teachers, district leaders, and policymakers. These kinds of formal hybrid roles take TLs out of the historically defined category of teacher, and yet do not afford them the same kind of authority and position as administrative leader. Thus, this emerging category of school leadership raises questions about how teachers navigate their transitions to TLs, how they perceive or understand themselves within these new school leadership roles.

Margolis and Huggins (2012) claim that because “cognitive frames” for teacher and administrative roles have largely remained the same, a situation has arisen “where the development of new roles [may be] far [outpacing] people’s sense-making” of leadership distribution (p. 956). The contradictory messages concerning the current state of teacher leadership seem to reinforce her assertion. Collay (2006) suggests that in consequence to a lifetime of exposure to teachers’ work, teachers come to their first positions with strongly held beliefs about who teachers are and what they do. Because these beliefs are developed and enacted within the school hierarchy, Collay similarly asserts that teachers have “deeply held beliefs about what leading is and who can do it” (p.133). Hence, when teachers move into “positional leadership roles the process (of identity formation) begins anew” (p. 132).

New Roles, New Identities

These new models for teacher leadership require teachers to reconcile their old and new, emerging identities within their school communities, for themselves and among their adult colleagues. The teacher turned teacher leader must ask questions of professional identity: Who am I as teacher leader? Am I simply or more than both teacher and leader? As TLs come to understand themselves within and embrace this new category, or “new leadership niche” (Margolis & Huggins, 2012), shifts in sense-making are required in this “pseudo-administrative space” (Barth, 2001).

The research literature recognizes the importance of identity development in teaching and teacher development. Hammerness, Darling-Hammond, and Bransford (2005) assert that
“developing an identity as a teacher is an important part of securing teachers’ commitment to their work” and that “the identities teachers develop shape their dispositions, where they place their effort, whether and how they seek out professional development opportunities, and what obligations they see as intrinsic to their role” (pp. 383–384). This section examines theoretical and empirical research on identity before exploring the research on teacher professional identity for insights about how TLs might navigate this process of reconciliation between “old cognitive frames” and “new mental models” (Goldstein, 2004; Margolis & Huggins, 2012; Mevorach & Strauss, 2012).

**Identity theories related to teacher leadership.** The categories of teacher and of school leader are socially and culturally defined (Meyer & Rowan, 2007). Thus, teacher leader identity seems appropriately examined through sociocultural theories that suggest “individuals develop their identities through day-to-day interactions, and that widely held societal and cultural definitions shape how [individuals] see [themselves] and [their] place in the world” (Lieberman & Friedrich, 2010, p. 8, emphasis preserved). One such theory is articulated by Wenger (1998) in which he explains identity as: *lived, social, and negotiated, as well as a local-global interplay, a nexus, and a learning process.*

Wenger (1998) stipulates that individuals develop their identities within a community of practice or group of members who engage mutually with one another through a *shared repertoire* that defines how they interact and behave toward and with one another. This shared “practice” is social. The extent to which individuals have knowledge and competence with this shared repertoire actually determines their membership within the community. As members “negotiate the meaning” of their inclusion within a particular community or set of communities, they also experience “ways of being a person in that context.” Consequently, the formation of a community of practice is also the negotiation of identities. This negotiation is an on-going, lived experience of “becoming” (p. 149), and individuals define who they are by where they have been and where they are going. According to Wenger, individuals move through a “succession of forms of participation” which form “identity trajectories” that connect past, present, and future (p. 154).
Sachs (2001), citing Wenger (1998), emphasizes that these communities of practice are not “self-contained” but rather part of larger social, historical, cultural, and institutional contexts (p. 158). Hence, identities are not “just a matter internal to that practice” in which we are contained in the community. Identities are “also a matter of how our position and the position of our communities fit within the broader social structures” (p. 148)—what Wenger calls a local-global interplay (p. 163). For example, teachers in schools are positioned both within their classrooms, their individual grade levels and departments, school buildings, and even districts. At the same time, they are also positioned within the larger social structures that define in part what school is and does and what teachers are and do.

According to Wenger (1998), individuals belong to multiple communities of practice, or what Lieberman and Friedrich (2010) call “many social circles over time” (p. 9). Their identities are “constituted not only by what [they] are, but also by what [they] are not” (Wenger, 1998, p. 164). For Wenger, “non-participation” in particular communities of practice is “as much of a source of identity as participation” (p. 164). Therefore, another characteristic of identity is a nexus of different meanings and forms of participation—a “process of reconciliation” between multi-memberships and non-membership. Wenger claims this reconciliation is continuous; individuals are constantly “making sure [their] various forms of membership co-exist,” leading either to “successful resolutions” or “constant struggle” (p. 160).

Holland, Lacchiotte, Skinner, and Cain (1998) similarly conclude that identity is socially constructed in interaction—an “identity in practice” in which practice integrates with culture and agency. They “conclude that individuals’ identities and sense of ability to act do not come from within but are shaped by their use of and response to cultural norms and givens.” Therefore, “identity, expertise, and the worlds in which these phenomena exist codevelop [sic] overtime” (as cited in Lieberman & Friedrich, 2010, p. 9).

Both of these theories stress the dynamic (on-going) influences of social interaction (practice), culture (norms and givens) or context (community of practice), and agency (expertise or competence in practice). The literature on teacher identity and teacher professional identity
confirms these theoretical features as components of teacher and teacher leader development.

**Teacher identity and teacher professional identity.** Two reviews of professional identity literature as it relates to teachers, one by Beijaard, Meijer, and Verloop (2004) and another by Trede, Macklin, and Bridges (2012) reveal a dearth of studies that rely on similar conceptions of teacher and/or professional identity. Beijaard et al. (2004) analyzed twenty-two of twenty-five studies on professional identity related to teaching or teacher educators published between 1988 and 2000. They found that the literature could be divided into three categories: identity formation, identification of the characteristics of professional identity (by teachers or researchers), and teacher stories representing their professional identities. They compared these studies both within and among each category. One of the researchers’ main findings was that there are no clear definitions for professional identity or teacher identity in these studies.

Trede et al. (2012) analyzed teacher identity studies related to higher education. While their initial search yielded over one-hundred and fifty articles, their examination focused on eighteen studies that the researchers felt “more deeply” defined the concept. Overall, however, they found a lack of clear conceptualizations of professional identity and a “disparate range” of theoretical frameworks present in the studies. They consider these varied frameworks indicative of an “underdeveloped field” (p. 375). Like Knowles (1992), both sets of researchers characterize identity as an “unclear concept in the sense of what, and to what extent, things are integrated in such an identity” (as cited in Beijaard et al., 2004, p. 108). These “things” are: self-image, society’s expectations of what teachers are and do, the role of teacher, and teacher beliefs.

**Four features of teacher identity.** According to Beijaard et al. (2004), professional identity exhibits four common features that reflect theoretical components of identity development found in the sociocultural approaches of Wenger (1998) and Holland et al. (1998, as cited in Lieberman & Friedrich, 2010) defined earlier. These four features are:

- dynamism,
- sensitivity to context,
• inclusion of sub-identities, and
• agency.

Descriptions of these four features follow with brief highlights of their implications for teacher leadership, in particular how these teacher professional identity components intersect with what the research suggests are constraints and supports of teacher leadership.

**Teacher professional identity as dynamic.** Beijaard et al. (2004) assert that teacher professional identity development is a continuous process of “interpretation and reinterpretation” (p. 122), an idea reminiscent of Wenger’s (1998) concept of “reconciliation” or “negotiation.”

Lieberman and Friedrich (2010) conducted a qualitative study on how teachers learn to lead. In their analysis of vignettes written by thirty-one educators about a “slice of their leadership practice” (p. 8), these scholars found that virtually all of their participants “addressed issues relating to developing a leadership identity.” The study results suggested that similar to their identities as teachers, participants’ teacher leader identities also were dynamic, “gradually unfolding and developing over time” (p. 25).

**Teacher professional identity as influenced by context.** Beijaard et al. (2004) assert that professional identity is both personal and contextual. It is influenced by factors that include: “school environment,” “nature of the learner population,” “impact of colleagues and of administration,” “own experiences as learners in school,” and “emotion regarding teaching discipline” (Beauchamp & Thomas, 2009, p. 184). Within the larger social context, a teacher is expected to “behave professionally” according to a prescribed set of characteristics; and yet, every teacher will respond uniquely to the local school contexts in which they work. Here, the researchers cite Feiman-Nemser and Floden (1986) who believed that within the same school each teacher will develop his or her own teaching culture to some extent (as cited in Beijaard et al., 2004, p. 122). Olsen (2008) believes the “influences and effects from [these] immediate contexts” (together with prior constructs of self) “intertwine” inside a “flow of activity,” making a
teacher’s identity both a process in and a product of “given contexts and human relationships” (as cited in Beauchamp & Thomas, 2009, p. 177).

Another contributor to this “flow of activity” influencing teacher professional identity are reform contexts that bring greater bureaucratic controls to teachers’ work (Trede et al., 2012). Beijaard et al. (2004) cite the work of Connelly and Clandinin (1990; 1999) which similarly points to reform agendas as a professional identity influence for teachers. These scholars assert that “shifts” in identity caused by changing education reforms are “often accompanied by tensions and dilemmas” (as cited in Beijaard et al., 2004, p. 121). Teachers must sometimes negotiate the differences between reform mandates and their own ideas of who they are as professionals and what they want for students. This negotiation may give rise to what Sachs (2001) deems an activist teacher identity, a conceptualization of professional identity that aligns with definitions of teacher leadership as collaborative, collegial, and intrinsically motivated to serve the welfare of the collective common good. Thus, both of these sets of contextual factors connect to teacher leadership.

As teacher leadership in this fourth and latest “policy moment” has become more heavily “weighted toward institutional reform agendas” (Little, 2003), these tensions and dilemmas have implications for how Tls’ understand themselves and their leadership practice. Furthermore, formal TL roles invite teachers to change positions over time, work across or beyond school environments, and continually develop relationships with adult colleagues over time as they extend their professional responsibilities into leadership. Therefore, this second feature of professional identity cited by Beijaard et al. (2004) has implications for interpreting how Tls’ professional identities are shaped by their immediate social contexts.

In fact, these factors parallel what the teacher leadership literature suggests are concomitant obstacles and supports of teacher leadership, including: beliefs or culture, structures, and trust or colleague relationships. (IEL, 2008; Muijs & Harris, 2007; York-Barr and Duke, 2004). Studies indicate that teacher learning and leadership flourishes in collaborative school cultures with strong working relationships that are supported by the time, space, and resources necessary
for sustained teacher interactions (Barth, 2001; Coburn & Stein, 2006; IEL, 2008; LeBlanc & Shelton, 1997; Muijs & Harris, 2007). Moreover, research shows that these collaborative relationships are often strained by the culture and social norms within school faculties (Lieberman & Friedrich, 2010; Barth, 2001; Smylie et al., 2003). Together this literature suggests that TLs may come to understand themselves differently depending on the extent to which their school contexts are collaborative.

**Teacher professional identity as multiple identities.** The third feature that Beijaard et al. (2004) assert as essential to teacher professional identity is the inclusion of sub-identities. The researchers found that teacher professional identity is actually composed of a collection of sub-identities related to the different contexts and relationships that teachers develop within their work. Some of these identities are core and others are peripheral, much like Wenger's (1998) concept of multi-membership. Gee (2001) similarly explains that “identity suggests a ‘kind of person’ within a particular context”—“a core identity” that he believes takes on multiple forms and is perceived in four ways depending on the individual’s context: nature identity (natural state), institution (a position recognized by authority), discourse identity (discourse of others about oneself), and affinity identity (one’s practice in relation to external groups) (as cited in Beauchamp & Thomas, 2009, p. 177). The studies cited in Beijaard and his colleagues’ (2004) review also reveal it is important for these sub-identities not be in conflict.

Lieberman and Friedrich (2010) discovered that the TL participant vignettes they analyzed often highlighted how participants “reconciled their dual identities as teachers and leaders and the challenges that emerged” in that reconciliation process (p. 27). Many of the vignette writers were “reluctant to claim the title and identity of leader,” in part because of the “egalitarian [teacher] culture of schools” that view teachers as the same and separate from school administrators who have more authority (p. 7). The teacher leadership literature asserts role ambiguity as a constraint on teacher leadership development (Barth, 2001). Together, these findings by Beijaard et al. (2004), Lieberman and Friedrich (2010), and Barth (2001) have implications for TLs serving simultaneously in classroom and leadership capacities; hybrid
teacher leadership roles may catalyze sub-identity conflicts between how TLs identify themselves and how they are identified by their teaching peers. Accordingly, the fourth feature of teacher professional identity—aGENCY—may be affected by conflicting sub-identities.

**Teacher professional identity as agency.** In their analysis of the teacher professional identity research, Beijaard et al. (2004) posit that teachers need to be active participants in the process of professional development, whether individually or in collaboration with others (citing Coldron & Smith, 1999, pp. 122-123). Therefore, agency is an important element of professional identity.

Agency is defined by Bandura (2009a) as “the human capability to exert influence over one’s functioning and the course of events by one’s actions” (p. 8, as cited in Weibell, 2011, para. 3). Bandura (2006) connects agency with self-efficacy, as part of his fourth agentic property—self-reflectiveness. According to Bandura (1994), self-efficacy is “people's beliefs about their capabilities to produce designated levels of performance that exercise influence over events that affect their lives” (para. 1). He believes self-efficacy is “central” among the “mechanisms of personal agency” (Bandura, 1989, p. 1175). Furthermore, Bandura (1994) asserts that the “most effective way of creating a strong sense of efficacy is through mastery experiences.” In his words: “successes build a robust belief in one's personal efficacy” (I. Sources of Self-Efficacy, para. 1). Therefore, expertise, is a factor in teacher professional identity.

Beauchamp and Thomas (2009) cite identity and agency as “inextricably linked” in the research literature in two ways. First, a teacher’s “realization of his or her identity in performance within teaching contexts” may result in a “sense of agency,” or “empowerment to move ideas forward . . . or even to transform the context” (p. 183). Second, particular definitions of identity account for agency in the constructing of identity. Moreover, the third feature of professional identity—multi-dimensionality—implies that “agency may be involved in the maintenance or further shaping of these identities and the attention to tensions among them” (Beauchamp & Thomas, p. 184).

Beijaard et al. (2004) evoke the first link between the realization of identity and resultant
agency when they suggest that teachers can exercise agency in various ways “depending on the goals they pursue and the sources available for reaching their goals” (p. 123). In the context of formal teacher leadership, the roles TLs choose may be one “goal” resulting from successes and “heightened awareness of their teacher identities” which then “[lead] to a strong sense of agency” (Beauchamp & Thomas, 2009, p. 183). Lieberman and Friedrich (2010) also provide support for this connection between agency and teacher leader identity; they found that participants did not adopt a leader identity until they had reached feelings of competence and confidence, or “individual senses of agency” in their leadership practice (p. 100).

Definitions of teacher leadership in the literature similarly emphasize competence or expertise as an essential characteristic of TLs, pointing to a kind of developed professional fluency as a basis for their deployment as influencers of the improved instructional practices of other teachers (Curtis, 2013; IEL, 2008; Katzenmeyer & Moller, 2009; Muijs & Harris, 2007; York-Barr & Duke, 2004). However, the teacher leadership literature also suggests that teachers serving within leadership positions feel frustrated due to a lack of adequate training and preparation (Little, 2003; Muijs & Harris, 2007; Sherrill, 1999; York-Barr & Duke, 2004)—an indication that the sense of agency that may have brought them to leadership is now compromised in their new role.

To summarize, the teacher professional identity literature, when examined in concert with the research on how teacher leadership is supported or constrained, indicates critical connections between how teacher leadership emerges and what influences teachers’ continuously developing understandings of themselves in leadership roles or practices beyond the classroom. These connections involve multiple factors: (a) context (school structures, cultures, and the education reform landscape); (b) the negotiation of multiple sub-identities; and (c) agency in multiple ways—through the purposeful interpretation of identity, the formation of identity which may result in a sense of agency, and the development of competence in practice which reinforces a particular identity.

In order to understand more deeply the dynamic intersection between teacher
professional identity, agency, and context, I examine the literatures that explore teacher career stages or phases and trace the development of teacher practice or expertise. The research in this next section provides insights into when and how teacher leadership may emerge within the professional trajectory of teachers and how it may be influenced by historical, social, personal, and cultural factors.

**Teacher Career Stages and Development**

Within the development of a teacher, there are typical *maxi-cycles* that make up particular stages of a teacher's career (Huberman, 1993). The characterization and related timing of these career phases are connected and mutually reinforced in: (a) the theoretical identity literature, (b) the literature tracing the development of teacher expertise, and (c) the literature that investigates the influence of age or experience on teacher attitudes, practices, and concerns. The following sections examine each of three phases in the teacher career trajectory, which do not necessarily happen in a predictable and strictly linear fashion (Huberman, 1993). Within each of these phases, I explore the intersections of the following theoretical and empirical research: Wenger’s (1998) theory of identity as learning trajectories; Fuller’s (1969) and Sikes’ (1985) findings on the development of teachers’ attitudes, beliefs, and concerns; and Berliner’s (2004) framework for the development of teacher expertise.

Huberman’s (1993) landmark work *The Lives of Teachers*, reports his findings from a mixed-methods study of the “different trajectories that teachers’ lives and careers can and do take” (p. vii). Among other variables, he examined teachers’ perceptions of themselves as classroom teachers at different moments in their careers, as well as whether teachers perceived themselves as more competent with years of experience. Huberman found that there were typical phases in the careers of his teacher participants. The following three phases are most pertinent to examinations of teacher leadership: (1) survival and discovery, (2) stabilization, and (3) experimentation and diversification.
The early years: the survival and discovery of novices. Huberman (1993) reveals the early career of his teacher participants as a stage of parallel survival and discovery. Exploration is a theme among his interviewees regarding these initial years in the profession (usually the first five years). Fuller’s (1969) study of teacher concerns marks a similar stage she terms the “early teaching phase.” Resembling Huberman’s survival characterization, her findings reveal teachers’ concerns during this phase include supervisor evaluations of their practice and teachers’ abilities to control their own classrooms. For Sikes (1985), disciplinary and subject matter concerns also mark this phase as a time when teachers feel limited agency and expertise with the technology or craft of teaching as they explore adult living.

This exploration and sense of limited agency parallel what Wenger (1998) terms an inbound identity trajectory; teachers in this stage are “newcomers . . . joining the community with the prospect of becoming full participants in its practice.” As a result, their identities are “invested in their future participation,” or who they may become (Wenger, 1998, p. 154). Hence, the emphasis on improving practice, survival, and discovery (Fuller, 1969; Huberman, 1993; Sikes, 1985).

Berliner’s (2004) research on developing teacher expertise suggests that these survival concerns are exhibited in conformity to rules and what he calls a “deliberate,” relatively inflexible instructional delivery. Berliner (2004) asserts that many teachers do not leave this stage of development until at least the third year of teaching. For many, moving to the next stage takes even longer. If TLs are classroom experts who have developed or exhibit feelings of agency and trust, then this research suggests that their emergence may only take place once they have passed these early phases of their careers.

The stable years: from advanced beginnings to committed competence. The teachers in Huberman’s (1993) study reveal the next stage occurs between five and ten years in the profession and characterize this stage as a time of commitment to teaching or stabilization. This stage also is marked by a sense of belonging and relaxation. Huberman points to
pedagogical mastery and burgeoning consolidation as important factors in securing commitment in this phase. Confidence is accrued along with a “personal basal repertoire” that brings reassurance and relaxation for teachers in the classroom and among peers (pp. 5-6). Huberman asserts that this period of stabilization is necessary for professional satisfaction (p. 249) and that the decision to commit to the “order of teaching,” if made in this stage, has a “sustaining power of at least eight to ten years” (pp. 5-6). For Huberman, “satisfaction” is defined as increased involvement in the teaching career. This satisfaction aligns with what Sikes (1985) asserts is part of a second career phase for teachers between the ages of twenty-eight and thirty-three—an interest in pedagogy and the use of original ideas, instead of simply what was acquired during preparation or training. Sikes, like Huberman, also found that this was the stage when teachers were tentatively confirming their “life structure” (akin to commitment).

This sense of commitment is reminiscent of Wenger’s (1998) theory stipulating that full membership in a community constitutes an insider identity trajectory and requires competence in its practice. Furthermore, this insider identity presents continuous opportunities renegotiation as the “evolution of practice continues [with] new events, new demands, and new inventions” (p. 154).

Similarly, Berliner (2004) would attribute the “belonging” or “relaxation” during this career stage to the teacher’s acquisition of more practical knowledge that results from classroom experience during the second and third stages of development toward expertise. Berliner calls these stages advanced beginner and competent. He defines the advanced beginner as “insightful,” a teacher who recognizes similarities and patterns across contexts. In three to five years, Berliner believes that many teachers reach competence, a developmental stage when teachers are more personally in control, become more rational, and make conscious decisions about what they are going to do. While not as fluid or flexible as in the next stage, teachers in the competent stage take more responsibility for instructional decisions and classroom outcomes (Berliner, 2004). In fact, Sikes’ (1985) findings similarly suggest that teachers in this stage of expertise development begin to wish for greater responsibility, as well as seek promotion. These
desires reflect a growing sense of agency in this stage that allows teachers to relinquish concerns of survival, and move more toward concerns of pupil learning (Fuller, 1969).

**The active years: experimentation, diversification, and expertise.** The next stage—experimentation and diversification—leads to personal research and a "grand opening to outside influences" (Huberman, 1993, p. 249). This new stage can often occur between eight and twelve years of experience, and within it, teachers desire to have more impact in the classroom and search for novel challenges as a way to “exploit newly-acquired feelings of effectiveness and competence” (Huberman, 1993, p. 8). Huberman (1993) cites Feiman-Nemser (1985) who argues that this desire for greater classroom impact is the result of pedagogical consolidation. These findings are consistent with Fuller’s (1969) "late phase” teachers’ concerns about their personal contribution to student outcomes (p. 221). This growing sense of responsibility aligns with an activist orientation that Huberman also associates with this stage.

Teachers in the experimentation and diversification stage are the “most engaged beyond the boundaries of their own schools in district-wide curriculum committees or collective action,” according to Huberman (1993, p. 7). These teachers are not only diversifying their own classroom instruction, but they also may be making an “activist push for more reforms, attempting to change a given situation” (p. 7) as a result of “[experiencing] successful interventions in situations of uncertainty” (Huberman, 1993, p. 182). Huberman cites Prick’s (1986) findings as consistent with his, declaring an “activist evolution” of teachers occurs most frequently during this stage, as well as the previous one (or between two to three years and eight to twelve years of experience). In fact, a recent MetLife survey of teachers and principals (MetLife, 2013) suggests that this desire for more responsibility, promotion, and increased activism may be catalyst for the emergence of teacher leadership in this career stage. Survey results showed that 51% of teachers who reported currently holding some form of formal leadership role in their school were “more likely than other teachers to have at least six years of teaching experience (86% vs. 73%)” (p. 49). Berliner (2004) suggests another factor influencing teacher desires in this phase: the attainment of proficiency and expertise.
Tending to combine these two stages of development, Berliner (2004) describes the expert teacher of these stages as “intuitive” and “arational.” They are fluid performers who are not consciously choosing what to do (p. 207). These teachers are “increasingly self-controlled, self-monitored” when it comes to their learning (p. 205). Such expertise may explain the shift in teachers’ attentions suggested by Huberman (1993): from personal instructional performance alone toward broader engagement outside their own classrooms. Sikes’ (1985) similarly asserts that teachers in this stage commonly develop interests in management and the organization, as well as in positions involving the guidance of younger staff (p. 50).

Promotion, activism, experimentation, and broader engagement outside the classroom: these elements of the stabilization and diversification career phases (Huberman, 1993) are all characteristic of a what Wenger (1998) deems a boundary identity trajectory (Wenger, 1998). This trajectory “[finds its] value in spanning boundaries and linking communities of practice” through brokering: the use of multi-membership to make connections across practice communities (Wenger, 1998, p. 154). Wenger explains that the job of brokers is to “cause learning” by connecting elements of one practice community with elements of another (p. 109). To span these community boundaries, brokers must have “the legitimacy to influence” in order to “mobilize attention” and “address conflicting interests” through a process of “translation, coordination, and alignment of perspectives” (Wenger, 1998, p. 109).

To synthesize, the research presented in this section suggests that teachers, when moving through the stabilization and diversification stages of their careers, experience increased motivations as the result of acquired competence or expertise. Consequently, teachers may exhibit desires for promotion and behaviors associated with collective action that extend beyond a teacher’s own classroom toward reforms in the school, district, or beyond. This extended reach is akin to brokering, part of a boundary identity trajectory (Wenger, 1998). Thus when combined, Wenger (1998), Huberman (1993), Sikes (1985), Fuller (1969), and Berliner (2004) provide a possible framework through which to examine when, how, and under what conditions TLs emerge, as well as what influences teachers to perceive or describe themselves as teacher
leaders and their work as teacher leadership. The next section utilizes connections discovered in the reviewed bodies of literature to construct a conceptual framework for the study's investigation of teacher leadership.

Conceptual Framework: Connecting Teacher Leadership, Development, Identity

The definitions of teacher leadership that began this literature review emphasize the classroom expertise, collective responsibility, and informal or formal influence of TLs both within and beyond the classroom, at both the school and the organizational or system levels (Curtis, 2013; Katzenmeyer & Moller, 2009; TLEC, 2012; York-Barr & Duke, 2004). Thereby, conceptualizations of teacher leadership reinforce the connections just presented between the following components of teacher development as they occur within a particular career stage: (a) teachers' increased motivations for promotion and for activism (Fuller, 1969; Huberman, 1993; Sikes, 1985), (b) their growing competence or expertise (Berliner, 2004), and (c) their accumulating desires for greater responsibility and impact both inside and outside of the boundaries of their own classrooms (Huberman, 1993; Sikes, 1985; Wenger, 1998).

![Conceptual Framework Diagram]

Figure 1. Conceptual framework for investigating teacher leadership influences.

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Figure 1 illustrates how each of these components align vertically within a particular stage of a teacher's career and development as suggested by the literature. The horizontal alignment of these components reveals the connections between the teacher development findings and the theoretical trajectory of identity development. Taken together, these arrows represent a framework for operationalizing investigations into teacher leadership as a boundary identity trajectory which is influenced by activist desires resulting from the development of competence or expertise between three and twelve years of experience, or as part of the diversification career stage (Berliner, 2004; Fuller, 1969; Huberman, 1993; Sikes, 1985).

However, as the teacher professional identity literature suggests, these processes do not occur in a vacuum. Beijaard et al. (2004) find that teachers develop agency, and thereby identity, within particular contexts: social, historical, and political. The school leadership and teacher leadership literatures suggest that particular school structures, cultures or social contexts either cultivate or compromise teacher leadership and the kinds of teacher beliefs (trust, collaboration, self-efficacy) and attitudes that foster agency, and thereby competence, through shared leadership (Collay, 2006; LeBlanc & Shelton, 1997; Mascall, Leithwood, Strauss, & Sacks, 2009; Smylie et al., 2003; York-Barr & Duke, 2004). Therefore, these mediating contextual influences are represented in Figure 1 by the first box (school leadership contexts) that circumscribes the aligned development, desire, career stage, and identity trajectory arrows. This box is dotted or permeable to represent how this layer of influences interacts with the second layer, or outermost box which illustrates the larger, historical and political influences that make up a school's institutional context—another contextual influence on teacher professional identity (Trede et al., 2012; Sachs, 2001). Together these school-based factors and institutional factors constitute the local-global interplay (Wenger, 1998) which the theoretical literature suggests is characteristic of the negotiation of identity.

The teacher leadership, teacher professional identity, and teacher development literatures reviewed here suggest critical connections between all of these components: (1) a teacher's professional career trajectory and development, (2) a teacher's desires or motivations,
(3) a teacher’s competence in practice, (4) a teacher’s identity formation, and (5) a teacher’s school or social context. As demonstrated in the above framework, these connections suggest earlier conceptualizations of teacher leadership that explain who TLs are (classroom experts) and what they do (influence collective responsibility) (Curtis, 2013; Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004) could be extended to include the relationship between these elements, as well as a teacher’s development and school context—a potentially new way of conceiving of teacher leadership as the following: a professional identity that develops as a result of agency acquired through competence or expertise at a particular career stage within the on-going development of a teacher which thereby catalyzes desires for professional activism through brokering inside particular school social contexts.

Consequently, an investigation into how teachers experience their leadership roles, describe themselves as teacher leaders, their work as teacher leadership, and what influences those perceptions must examine the dynamic (on-going), mutually constitutive influences of social interaction (practice); culture (norms and givens) or context (communities of practice within particular education reform landscapes); attitudes (self-efficacy); and agency (perceived competence in practice) of those who occupy roles that invite them into the negotiation of multi-membership between environmental boundaries.
CHAPTER 3: Method and Research Design

According to Erickson (1986), a basic assumption of interpretive theory is that within social organizations “particular sets of individuals come to hold distinctive local meanings-in-action”; they share perspectives “intersubjectively” (p.129). For Wenger (1998) these “sets of individuals” constitute communities of practice in which Erickson’s “local meanings-in-action” are the result of negotiated responses to mutual engagement in a joint enterprise—or participation in the practice that defines membership within the community. Wenger stipulates that the concept of practice, while it “connotes doing,” is not “doing in and of itself.” Rather, it is “doing in a historical and social context that gives structure and meaning to what [individuals] do” (p. 47). Interpretive research makes a clear distinction between behavior and action. While behavior is the physical act alone, action is the physical act and the “meaning interpretations held by the actor and those with whom the actor is engaged in interaction” (Erickson, 1986, pp. 126-127).

The interpretive theory of social organization and the study’s theoretical framework share a focus on how context relates to the actions or practice of specific persons in interaction with one another and how those interactions help individuals negotiate the meaning of particular processes, events, objects or symbols. Approaching the study using methods informed by the interpretive lens, I explored how individuals in formal TL roles make sense of their practices of participation as “teachers” and as “leaders”—as brokers between multiple communities of practice within and beyond their schools (Wenger, 1998). Hargreaves and Fink (2009) assert that “schools have many ‘communities of practice’” (p.184), or make up what Wenger (1998) calls a “constellation of communities.” Additionally, Wenger specifies that identity and practice are “mirror images of each other” (p. 149). Therefore, by exploring what these individuals do in their formal roles and the ways in which TLs experience or interpret the meaning of their roles within these professional constellations, I also explored how these individuals see themselves and negotiate their “work-related identities” (Busher, Hammersley-Fletcher, & Turner, 2007) as leaders.

Qualitative methods, as described in the subsequent section, helped me to garner these
subjective meanings and perspectives, as a result of the interactions among individuals within a particular social setting. A focus on both perspectives and processes, according to Maxwell (2013), requires methods that garner rich description and detailed accounts of how participants make sense of their experience, a major strength of qualitative research approaches. Thus, qualitative approaches served the intellectual goals of gaining an understanding of how the teachers serving within these roles understand their membership experiences, and thus their identities as teachers and as leaders within their professional social contexts. In addition, contextual conditions are important to this investigation of a contemporary phenomenon (Yin, 2014). The study focused on individuals within bounded contexts. In consequence, case study methods were appropriate (Miles, Huberman, & Saldaña, 2014, pp. 30, 33). Particularly, multiple cases offered an even deeper understanding of the influences on TLs and increased confidence in the findings.

**Research Questions and Goals**

This qualitative research study used as its unit of analysis eight secondary school teachers fulfilling leadership responsibilities in non-charter public school systems. The examination focused on what influences these teachers to serve in teacher leadership roles, how they experience, understand, and negotiate their dual roles, and what contextual factors influence these experiences.

My goals for this study were primarily what Maxwell (2013) terms intellectual goals, but in that this exploration could inform the ways in which school settings support or implement leadership roles among teachers, they were also practical goals. As opportunities for teacher leadership are already a reality in some school districts and systems around the country, there is a need for information that can help teachers, administrators, and policy-makers move “developmentally further toward idealized visions of teacher leadership where it is the common culture of schools” (Margolis & Huggins, 2012, p. 978). Since much of the school leadership literature focuses on individuals serving in administrative roles, my study may help to bring the
voices of teacher leaders into the broad leadership conversation.

My choice to utilize qualitative, rather than quantitative methods was guided by the research described earlier that makes clear that teacher leadership is influenced by both personal and contextual issues that are likely to be most open to exploration through interpretive methods. I used such methods to explore the following questions and sub-questions:

1. How do secondary public school teachers serving in leadership positions experience these roles?
   (a) What contextual factors influence how these teachers experience their roles?
   (b) How do these teachers describe their leadership?
   (c) How do their roles influence the way these teachers describe their leadership?
   (d) How do these teachers negotiate their dual roles as teachers and as leaders?
2. What factors influence secondary public school teachers’ decisions to serve and potentially remain in leadership positions?

These questions warranted a focus on the experiences of TLs and their meaning-perspectives or interpretive reality (Erickson, 1986) of who they are in connection with the formal roles they hold inside particular social contexts. Thus, I examined what TLs do, their responsibilities or duties, and I investigated how they came to and made sense of themselves in these dual roles (Maxwell, 2013). In addition, I examined how this understanding influenced their experiences and commitment to leadership positions within their particular settings. This focus on meaning required “up close” information (Creswell, 2014)—elements central to an interpretive methodological approach (Erickson, 1986). Miles et al. (2014) assert this approach is “fundamentally well suited [sic] for locating the meanings people place on events, processes, and structures of their lives and for connecting these meanings to the social world around them” (p. 11, emphasis preserved).

In the following section, I outline the methodological approach of the study and its connections to the conceptual and theoretical framework guiding the study before providing
details of participant selection. For the study, I chose three different data collection methods as described in the *Methods and Research Design* section. In the subsequent section, I briefly explain methods for data analysis before concluding with descriptions of how I addressed issues of validity, including my positionality as researcher.

**Methods and Research Design**

The criteria I used to identify sites for this research are detailed in the next subsection. More detailed information about each of the selected sites is then presented. Next, I detail the criteria used for participant selection within the chosen settings and provide information about participants.

**Site selection.** I deliberately selected two public secondary schools of similar size, one each from within two districts in which teachers are serving in formal leadership positions and are at the same time responsible for classroom instruction: hybrid teacher leaders (HTLs). The “hybrid” in HTL was defined as follows: any secondary teacher whose “official schedule includes both teaching K-12 students and leading teachers in some capacity” during a particular proportion of the school schedule (Margolis & Huggins, 2012, p. 954). The research literature revealed that hybridized TL roles are becoming more prevalent and are structured in numerous ways, depending on the district context (DCPS, 2013; MetLife, 2013; Portin et al., 2009). For the pilot study, TL participants taught 100% of their school day and fulfilled their leadership responsibilities in addition to their teaching schedules. Despite their full course loads, these TLs still experienced their formal roles as a unique positioning with the school leadership structure, a standing that influenced their experiences and identification within their roles. Therefore, I selected sites in which HTLs are responsible for their own classrooms at least 25% or up to 100% of their day.

As social and historical contextual influences were important considerations in both the methodological approach and the conceptual framework for the study, I selected public schools, rather than independent schools. Non-charter public environments are shaped by similar federal, if not state mandates, that in an era of reform place particular limitations on how schools do
business. In fact, in the new millennium “designated teacher leadership roles have become heavily weighted toward institutional agendas” (Little, 2003, p. 416) and “an established feature of reform” (Smylie et al., 2003). These changes are credited in the literature to two parallel forces in operation: accountability and the standards movement (Ronan Herzog & Abernathy, 2011, p. 189). Both of these forces impact public school contexts, more specifically, non-charter public schools which do not have the same wide-ranging variations in design or the same degrees of freedom and flexibility in how they meet and uphold performance requirements (USED, National Center for Education Statistics, 2014). Accordingly, I selected non-charter public school settings that provide opportunities for teachers to lead formally beyond, or in addition to, their classroom responsibilities in these kinds of efforts (i.e., improving teacher practice).

These new hybrid roles are already in place in multiple sites across the country, such as DCPS and Charlotte-Mecklenburg. Most of these districts are large urban or suburban environments that began creating these leadership roles as part of teacher career pathways in order to advance school reform efforts. Similarly, the pilot research was conducted in a large, suburban district hoping to utilize the formal TL position to advance accountability initiatives tied to new state standards and assessments. Because small and rural school environments require fewer faculty, and thereby offer fewer opportunities for formal hybrid positions, I selected one large suburban and one large urban secondary school serving student populations between approximately 2,000-3,000 students. In these schools there were multiple HTLs, increasing the possibility and opportunity of selecting a desired eight HTLs serving in formal roles. The variation and comparability of these roles within and between settings aided an exploration of the influence contextual factors and particular leadership responsibilities have on how HTLs experience their positions.

Data collection methods required multiple days of fieldwork in each of the two sites; therefore, selection of these secondary environments was also a matter of geographical convenience and accessibility for the researcher, making the study more financially feasible. After a regional search of possible sites, initial contacts were made through the central office and
building level administration for schools meeting the selection criteria. These administrative contacts were used to gain access to the sites and permission to conduct the study. They also served as key informants in the identification of potential HTL participants in each setting. Both sites are in the northeastern United States. The subsections below provide brief details about each site, before the next section outlines criteria for participant selection. More detailed information about these sites appear in Chapter 4 in order to immediately contextualize results of data collection.

**Site A: Mountain Valley Junior Senior High School.** A large suburban district in the northeastern United States, Mountain Valley (a pseudonym) serves 4,150 students in kindergarten through grade twelve across four buildings: three elementary schools and a combined structure for junior (grades seven through nine) and senior (grades ten through twelve) high schools. Information obtained from the State’s Department of Education website identifies this total student population as 87% white, 4% African-American, 4% Hispanic, and 5% Asian. Two of the District’s four schools receive Title I funding. Moreover, school performance reports accessed through this same online source show student achievement scores in the District for 2013-2014 were 83% and 80% in math and reading proficiency, respectively. Both percentages were above state averages. According to this same source, the secondary school, Mountain Valley Junior and Senior High School serves approximately 2,100 students.

The district employs three central office administrators (whose role are connected to instruction): Superintendent, Assistant Superintendent/Secondary Coordinator, and Elementary Coordinator. The elementary schools are led by one principal per building, and the secondary schools have a building-level administrative team comprised of one principal per building who leads with help from one assistant principal in the junior high school and two assistant principals in the senior high school. The District employs 252 teachers who, in addition to their classroom duties, can serve as leaders within their subject or content areas in a formally defined position known as: Teacher Leader (TL). A classroom practitioner and former TL in this setting, I explore issues of validity in connection with my positionality as a practitioner researcher in this site in a
Site B: Chestnut Hill High School. Part of a large, urban public system in the northeastern United States, Chestnut Hill High School (a pseudonym), is one of fifty-three secondary schools in the District, and according to participants, one of the few that has not been converted to a public charter. A comprehensive neighborhood high school that serves students in grades 9-12 within its attendance zone, Chestnut Hill High School (CHHS) also offers citywide programs that require special admission. These programs include career and technical education (CTE) and magnet programs. According to information obtained from the State’s Department of Education website, current student enrollment is 3,151. This total student population is 30% African-American, 21% Asian, 23% Latina/Latino, and 18% White. The remaining 7% of the student population includes Pacific Islander, American Indian, and students of mixed race or other ethnic origin. Currently, as reported by the State’s Department of Education, the ELL (English Language Learner) student group at CHHS is 19%, and 51% of the students qualify for free and reduced meal programs. The State’s Department of Education website provided 2013-2014 student achievement data. Student performance was above state averages with proficiency rates at 46%, 32%, and 51% respectively on state tests in math, science, and literature. The school leadership team is comprised of two co-principals and six assistant principals. Within the building there are two non-teacher student-and-teacher roster officials and one teacher who serves in the position of Roster Chair. In addition to responsibilities in the Roster Office, this individual teaches one class per day. The school employs one-hundred and thirty four teachers. Besides Roster Chair, there are fourteen leadership positions held by teachers in the building.

Participant selection. In total, eight teachers serving in HTL positions from across the two sites participated in the study. In CHHS five of six HTL participants matching the selection criteria were recruited to participate. Of these five, four serve in HTL positions as Small Learning Community Coordinators (SLCCs) with multi-disciplinary program wide purview. The remaining HTL participant from this site serves a core content area department head (DH). In MVHS, three
of five HTLs meeting the selection criteria were recruited. These HTLs serve as Teacher Leaders (TLs) in three core content areas, one with purview in the junior high portion of the building, and two with purview at the senior high level (see Table 1). The criteria for selection of these HTLs and additional study participants is described below.

**HTL participant selection.** Using comparable case selection in recruitment and selection allowed for within and cross-case comparisons. Additionally, multiple cases offered a deeper understanding of the processes and outcomes of cases and added confidence to findings (Miles et al., 2014, pp. 30, 33). From an initial list of all potential HTL participants provided by school site administrations, I purposively selected individuals who were “uniquely able to be informative because they are expert” in the area of focus (Weiss, 1994, p. 17, cited in Maxwell, 2013, Site and Participant Selection, para. 4). In this study, those individuals were teachers who had served at least three years in HTLs roles in the selected schools. Berliner (2004) asserts that competence develops between three and five years. In this stage of their development, teachers are more personally in control, become more rational, and make conscious decisions about what they are going to do. Consequently, HTLs in this range of experience were more able to articulate their experiences in negotiating their dual roles.

Additionally, I selected HTL participants who had at least six years of classroom teaching experience. The research literature reviewed here suggests teachers with at least three years of teaching experience who have achieved competence in practice are more likely to desire additional responsibilities as the result of increased agency and desires for activism (Beijaard et al., 2004; Berliner, 2004; Fuller, 1969; Huberman, 1993; MetLife, 2013; Sikes, 1985). If having come to their role during this stage, HTLs who also met the previous leadership experience criteria had to have had at least six years of total professional experience. Together, these experience criteria allowed me to explore conceptual and theoretical intersections and inform answers to the study’s question regarding influences on HTLs’ decisions to serve and remain in these positions.

An additional criteria allowed me to select participants who serve in similar leadership
capacities. To define those leadership capacities, I used Domains I through V of the Teacher Leader Model Standards (TLMS) which are supported by a list of functions that “more specifically define the range of actions or expectations for teacher leaders” (TLEC, 2012, p. 5). The five Domains are: (I) fostering a collaborative culture, (II) accessing and using research, (III) promoting professional learning, (IV) facilitating improvements in instruction, and (V) promoting the use of assessments and data. These Domains focus on leadership functions that invite HTLs into direct contact and interaction with teacher colleagues. These practices include, but are not limited to:

- collaborating with colleagues to support student learning (Domain I),
- assisting colleagues in accessing and using research to select appropriate instructional strategies (Domain II),
- facilitating professional learning and development (Domain III),
- analyzing and disseminating data for improved curricular and instructional opportunities (Domain IV), and
- interpreting student performance data to improve instructional practice and student learning (Domain V). (TLEC, 2012)

The study’s conceptual framework also highlights the influence of school or institutional contexts on teacher leadership. Particularly, in an era of standards and accountability “designated teacher leadership roles have become heavily weighted toward institutional agendas” (Little, 2003, p. 416) and “an established feature of reform” (Smylie et al., 2003). Consequently, school factors associated with accountability are potential influences on the activities and experiences of HTLs. So where possible, I selected HTL participants who, within their leadership roles, had some purview of tested subject areas or fellow practitioners with such responsibilities.

**HTL role partner selection.** Additional participants included the role partners (Maxwell, 2013) of these HTLs, in particular fellow teachers, principals or school leaders who work closely with these teacher leaders in their respective settings when fulfilling the particular
responsibilities of their positions. Role partners were key informants about the school contexts, providing information about how HTLs are utilized in the settings, the nature of adult or colleague interactions with HTLs, and other potential influences on the ways in which HTLs experience their roles within these settings as a direct result of the interactions with others required by their HTL roles. As Miles and his colleagues (2014) suggest, the primary concern in qualitative research is with “the conditions under which a construct operates,” and in order to examine these conditions, the researcher needs “to see different instances of it” (p. 33). Participants who work with HTLs in their settings also provided a source of triangulation as explained in a later section.

School districts are often comprised of multiple buildings, each with unique situational contexts. Consequently, school or district-wide participant samples were not be taken. Rather, HTLs, administrators, teachers, and external stakeholders who interact closely from within only the secondary level buildings of participating school sites were selected. Secondary environments similarly organize departments, courses, schedules, and curriculum—contextual factors that look markedly different in elementary settings. Huberman (1993) makes a similar selection when investigating the lives of teachers, noting that in the secondary environment there tends to be more available leadership positions and diversification of career choices at a particular stage of teaching experience. As Feiman-Nemser and Floden (1986, as cited in Beijaard, et al., 2004, p. 122) also note, even within a particular faculty distinct micro-cultures may exist, a notion that Erickson (1986) reveals about the investigation of individual classrooms. Therefore, where possible, I selected specific teacher role partners not only from within the same buildings, but also from within the same subject area departments or professional learning communities as selected HTLs. These role partner participants engaged mutually in joint enterprise and shared a repertoire of practice (Wenger, 1998), thus providing me the opportunity to employ the study’s conceptual framework to compare how particular contextual factors inform the interpretations of HTL practice and experience within and across the constellations of communities of practice in each secondary setting.

As a stranger to these settings, I relied on both the HTLs and the building level
administrators to create a list of individuals with whom the HTL participants work most directly and regularly as they fulfill their defined roles. Observations of, or work-shadowing HTLs over several days within the setting helped me to further refine this list of individuals. For each HTL, I purposefully selected from this initial list at least two commonly identified informants: one administrator and one teacher. In total, seven teacher role partners and three administrative role partners participated in individual or group interviews. One teacher role partner was dual identified as a role partner for two HTL participants, and therefore represented both HTL participants’ within school community contexts. Another teacher role partner did not appear for the group interview. At MVHS two assistant principals and one principal were recruited from among the three administrators who work with HTLs in that site. Of the four assistant principals identified by the building principals as individuals who work closely with HTLs in CHHS, two assistant principals were identified by the HTLs as individuals with whom they have frequent contact. One of these role partners was available to participate. Table 1 lists all participants by role and site.

Table 1

*Study Participants from Mountain Valley Junior Senior and Chestnut Hill High Schools*

<table>
<thead>
<tr>
<th>Mountain Valley Junior Senior High School Participants</th>
<th>Administrator Role Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HTL Participant</strong></td>
<td><strong>Program or Department</strong></td>
</tr>
<tr>
<td>Stacey—TL</td>
<td>Math (senior high)</td>
</tr>
<tr>
<td>Elizabeth—TL</td>
<td>English Language Arts (junior high)</td>
</tr>
<tr>
<td>Jarred—TL</td>
<td>Science (senior high)</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Chestnut Hill High School Participants</th>
<th>Administrator Role Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HTL Participant</strong></td>
<td><strong>Program or Department</strong></td>
</tr>
<tr>
<td>Justin—SLCC</td>
<td>Magnet (special admission)</td>
</tr>
<tr>
<td>Shannon—SLCC</td>
<td>Academic Language</td>
</tr>
<tr>
<td>Karen—SLCC</td>
<td>Career and Technical Education</td>
</tr>
<tr>
<td>Angela—SLCC</td>
<td>Ninth Grade Academy</td>
</tr>
<tr>
<td>Mark—DH</td>
<td>Social Studies</td>
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*Note.* HTL = Hybrid teacher leaders; TL = Teacher Leader; SLCC = Small Learning Community Coordinator.
Data Collection

I chose multiple methods of data collection for this study in order to broaden the range of investigation (Maxwell, 2013) into elements that shape HTLs’ roles, experiences, and the influences on these. Additionally, multiple methods provided important sources of triangulation for what were mostly self-reported data and helped to develop a holistic account, which Creswell (2014) asserts requires multiple data forms and perspectives. I utilized the following methods in the following sequence: (1) document review, (2) semi-structured interviews with HTLs and their role partners, (3) direct observations, and (4) HTL focus group interviews.

Document review and analysis. Document review was used to first learn more about and aid entry into each setting. In addition, documents augmented and helped corroborate evidence gathered from other sources (Yin, 2014). I conducted a review of documents or artifacts related to the school settings and the HTLs’ formal roles and responsibilities.

School setting documents and artifacts. As a first step, I collected publically available school demographic and student performance data. Other documents included school or district mission statements and websites for recent news releases and calendars of activities. I was a stranger to one of these sites. An initial review of these data sources helped me to learn more about each setting and explore potential researcher biases before site entry. Even though I work in one of these sites (MVHS), I examined whenever possible the same or similar documents for my own site. This exploration allowed me to attempt to make the familiar strange (Maxwell, 2013) and provided a useful source of comparison and contrast between sites in later stages of analysis. When not publically available, I gained access to these and other documents, through school administrators or officials, HTLs and their role partners.

HTL role-related documents and artifacts. Artifacts related to HTLs’ roles and responsibilities also were collected and reviewed. Several types of documents proved useful in the pilot study and were sought in this investigation. These data sources connected directly to, or were generated by HTLs as part of their position responsibilities, and included: job descriptions
and blank applications for HTL positions, completed meeting agendas or weekly/monthly reports, and schedules of HTLs’ daily activities. Other documents included: email communications between HTLs and teacher, as well as administrative role partners; reports of department or programmatic activities prepared for administration; teacher rostering or scheduling worksheets; and department budget summaries. Pamphlets used for recruiting students to programs or courses were also reviewed. Together, these artifacts helped demonstrate part of what Wenger (1998) calls the shared repertoire of a particular community’s practice. Evidence of these routines, symbols, or stories that HTLs share with their colleagues in the course of their role enactment represented an important source of shared meaning between the HTLs and the other adults with whom they work in teaching and leading. As products of the specific cultural contexts, these data helped to operationalize this component of the study’s conceptual framework.

HTLs were key informants in the document selection process. To address possible selection bias by participants, I used work shadowing of the HTLs in their settings to confirm selection of these documents as pertinent to the investigation and to further identify documents or artifacts of importance to the HTLs’ roles. Additionally, I used teacher and administrator role partners to further inform document collection. While I began my investigation with collection and analysis of these sources, I continued throughout the study to collect additional documents and artifacts that my growing familiarity with participants’ settings and roles revealed as important. These documents included classroom assessment templates and rubrics, as well as program course descriptions.

As part of what Argyris and Schön (1978) call the “map” of the organization’s culture, these documents served as an important method for gathering information about the ways in which participants make sense of what Wenger (1998) would term their joint enterprise, their actions and interactions. These documents also helped to uncover the similarities and differences between the participants’ written teacher leadership theory-of-action and its tacit theory-in-use (Argyris & Schön, 1978), especially when compared to HTL interviewees’ self-reported perceptions of their roles and responsibilities. Wenger describes the process of identity formation
within communities of practice as on-going—a matter of trajectories within which members shape and formulate their identities in negotiation with others in the community. Membership in a practice influences or shapes identity; therefore, document evidence provided one window into the extent to which HTLs were brokers between boundaries of particular communities of practice—a key component of the study’s conceptual framework.

An initial set of codes for HTL roles and responsibilities and school contextual factors was generated inductively from these document sources. Furthermore, initial document review provided information that informed additional prompts to interview protocols when information from documents proved hard to interpret. I was able to utilize the subsequent interviews as opportunities to ask clarifying questions and gather more information about specific duties or processes.

**HTLs interviews.** A portion of these interviews asked HTLs to describe their specific roles and responsibilities. These concrete details provided a window into HTL experience. Maxwell (2013) advises that interviewing can effectively tap into participants’ previous experiences by allowing them to call up specific sequences of events or episodic memories through sequencing events in time in connection with particular spaces. These specific connections helped me to determine the extent to which contextual and other influences shaped the trajectory of HTLs, their moves from the classroom to in-between leadership roles.

Furthermore, Connelly and Clandinin (1990) suggest that a “sense of the whole” experience for participants is built from rich data sources that focus on “concrete particularities” (p. 5). Accordingly, I conducted a series of two, in-person interviews with HTL participants in each site: one before observations of HTLs and one after, as described below. Both interviews were audio recorded and transcribed verbatim. An interview guide focused researcher and participant interactions. Transcripts provided an important means for comparing and contrasting how HTLs within and across settings described their leadership and its influences.

**Initial HTL interview.** The first interview was an in-depth, one-on-one, semi-structured
interview ranging from eighty to one-hundred and twenty minutes. While open interviews may have been more effective in delving deeply into the experiences of HTLs connected to their roles, I needed enough structure to allow for comparability between participant interviews. However, I made every effort to keep interview questions and prompts open enough to allow participants to talk freely and feel at ease.

A series of prompts asked HTLs to describe their experiences in their roles, including descriptions of their leadership, its functions and responsibilities, the nature of their interactions with other teachers and administrators in performing their role, and how they negotiate their dual roles in their settings. Additional prompts invited participants to discuss factors in their settings that influence their enactment of their formal positions. Pilot study interview protocols utilized similar questions and prompts. These were refined for use in this interview (see Appendix A). As Wenger (1998) asserts, identity and practice are linked and both are negotiated within particular social contexts. Therefore, these questions helped to operationalize portions of the study’s conceptual framework and inform the study’s questions concerning influences on HTLs. Namely, context and practice were investigated as influences on HTLs’ views of themselves and their leadership.

The second part of this initial interview included prompting a narrative of how HTLs came to desire and eventually hold their positions, as well as what may influence them to remain in their roles (see Appendix A). The research questions focused on the experiences and perspectives of a small number of HTLs, as well as the contextual factors within their settings that influence HTLs’ roles. Together, these topics of interest made the narrative portion of the interview appropriate for this study. According to Bates (2004), narrative interviews are best suited to “person-centered,” qualitative research involving a small number of study participants where the purpose is to understand the research topic from the participants’ perspectives and where the researcher needs to gain an insight into how study participants’ make sense of their experiences and the wider environment (p. 27). Bates further suggests that “how study participants report and narrate episodes . . . reflects the factors which influence their behavior” (p. 17).
Bauer (1996) asserts that a timeline, which marks no more than the beginning and the end of an episode, before the start of a narrative interview supports the informant in exploring the central topic. It becomes a visual aid for the narrator as she faces the task of segmenting the time in between. The timeline thus provides a concrete representation to prompt richer participant responses (p. 6). Beijaard (1995) suggests that these types of timelines make it possible to represent experience in a two-dimensional space, providing yet another point of comparison between respondents’ narratives (pp. 285-286).

Interviewees were asked to begin segmenting a timeline working backwards from their current HTLs role to their first teaching position by marking influential events in connection with their acquisition of, experience, and future in the HTL role. Beijaard (1995) suggests this strategy of moving from the present to the past because it “sets the stage” before “[demanding] that participants search their memory for significant…past experiences and events” (p. 58). However, all of the HTL participants expressed difficulty starting from their current position and working backwards. Each of them wanted to begin at the start of their teaching careers. In fact, three of the eight HTLs felt that influences on their decisions to lead preceded their first classroom post. Consequently, their timelines stretched from college attendance forward.

HTLs were asked to narrate the events on their segmented timelines. During this portion of the interview, in-depth questioning and probes elicited details about the influences and events mentioned by the interviewees, explaining or giving a rationale for the events’ inclusion on the timeline. Participants also were asked to share how they see themselves evolving in their roles (extending their timelines into the future) in order to inform the study question regarding how their leadership roles may be influencing them. The conceptual framework suggests particular connections between teacher leadership and the desires, beliefs, and attitudes of teachers within a particular career stage (Huberman, 1993; Fuller, 1969; Sikes, 1985). This second portion of the interview provides a concrete representation and interpretive explanation for when and under what influences HTLs came to desire and may decide to remain in their hybrid positions.

**HTL focus group interview.** Participants were interviewed a second time one to two
months later as part of a one-hour focus group within each setting, after all other data sources had been gathered and analyzed. Kitzinger (1994) suggests that focus groups where participants are encouraged to interact and engage with one another may help "draw out the cognitive structures which previously have been unarticulated" (p.108). This "[drawing] out of cognitive structures" provided evidence the study’s research questions required, if I was to uncover the influence of the school context on the experiences of HTLs, how they describe their leadership and who they are as leaders within each context. Additionally, as Cohen, Manion, and Morrison (2007) suggest, these group interviews provided an important means of triangulating individual interview and observation data (p. 377).

Focus group interviews followed individual interviews and work-shadowing the HTLs fulfilling some of the functions of their role. I brought to the group interviews what I thought I had seen and heard (see Appendix B). Using contact summaries (Miles et al., 2014) and field notes taken during site visits prior to each group meeting, I was able to trace patterns or possible themes, as well as gaps or holes in the data. Then, I was able to use the group interview as a form of member checking, a way of confirming the data already collected (Maxwell, 2013). This step proved critical. Participants used language in these interviews that provided synthesizing In Vivo codes (Miles et al., 2014) to help capture their shared experiences within, as well as further evidence of the local contextual influences on and differences in their positions. In addition, HTLs in each setting were asked to share the challenges and benefits associated with their roles. These points of investigation further informed the study questions regarding HTLs’ role experiences. Furthermore, several of the benefits of the position that HTLs reported in group interviews intersected with what HTLs cited individually as influences on their decisions to either serve or remain in these positions. Accordingly, such reports provided another source of triangulation in connection with the study question regarding what influences HTLs’ desires for leadership.

**Semi-structured role partner interviews.** In addition to HTLs, I interviewed their teacher and leader role partners (defined below). These role partners were key informants of the
kinds of negotiation required in HTL roles between teachers and administrative leaders in the research settings, as well as within district, school, department or faculty contexts that influence the formal role. Interview guides were refined and adapted for each type of role partner, as described below (see Appendix C).

**Administrator role partner interviews.** I conducted semi-structured, forty-five minute to one hour interviews with one administrator participant identified as a HTL role partner in each setting, defined as: individuals to whom HTLs are direct-reports or with whom HTLs work most closely and often in coordinating or executing HTL responsibilities. These individuals included three assistant principals in MVHS and one principal in CHHS. Administrator role partners were not asked specifically about the individual performance of HTLs. Rather, interviews with these participants focused on descriptions of HTL roles and responsibilities, contextual factors that influence these positions, and the history of the creation of these formal roles. In addition, these individuals were asked to share their perspectives on the benefits and challenges associated with having these roles as part of their school leadership structures—an important window into the beliefs, attitudes, and values that make up the social contexts within which these HTLs work.

**Teacher role partner interviews.** A total of six teachers were interviewed for this study: three from each of the HTLs’ within-site contexts. Selection of participants depended on the individual HTL role and which faculty members HTLs work with directly as part of their responsibilities. These individuals were all teachers in the same department or academic program as HTL participants, and dual identified by both the HTLs and by administrators as individuals with whom HTLs oversee or work with closely and often in executing HTL position responsibilities. Observations within each setting provided confirmation that identified teacher role partners worked closely with the HTL participants, helping to counteract any selection bias from HTLs and administrator participants. One teacher participant was dual identified as a role partner of two HTLs in one of the sites (CHHS), and therefore represented two HTLs. A seventh teacher
role partner did not appear for the group interview in one site (CHHS), despite having confirmed availability and desire for participation.

I convened these participants within each site for a forty-five minute to one hour group interview directly after the end of the school day. Their responses informed the study’s question concerning contextual factors influencing the HTL role both within departments or programs, and the larger school district context. I used a list of topics and prompts similar to administrator role partner interviews to elicit information about HTLs’ responsibilities within the building, the nature and frequency of teacher interactions with the HTLs, and interviewee perspectives on the benefits and challenges associated with having these roles as part of the school leadership structure.

Teacher role partner participants responded first to questions in turn about the functions and responsibilities of TLs in their respective departments. These responses then led to conversation which revealed more detailed differences between how the role was fulfilled within each of their department or program contexts due to a number of factors. However, an even more generative result of the group conversations was the teacher participants’ ability to reflect on and reveal ideas about the district context, or what Lambert (2003) might call the larger leadership “container” (p. 426) where this conversation took place.

All role partner interviews were audio recorded and transcribed verbatim allowing me to put the information gleaned from the document review and the other interviews in dialogue with each other. In this way, I was able to prompt re-examinations of my initial understandings from any one method (Greene, 2007, as cited in Maxwell, 2013).

**Observations.** After I interviewed HTLs about their experiences, I worked shadowed each of them for one school day using direct observations to confirm document and interview data (Yin, 2014) to provide a greater depth of understanding (Maxwell, 2013). For each participant I was able to observe interactions with students, interactions with department or program colleagues while fulfilling leadership responsibilities, and interactions with interviewed administrator role partners. Additionally, for HTLs in CHHS, I was also able to observe interactions with parents and community members.
Shadowing occurred on days when HTLs reported they would be involved in leadership activities. Some of these activities included teacher in-service workshops; formal department, program, or administrative meetings; common assessment data analysis; and open house presentations. In addition, I was able to observe HTLs engaged in classroom instruction, as well as informal conversations with department or program colleagues, with administrator role partners, and with students. Each observation took place within the first semester or half of each HTLs’ school year. This choice was informed by two factors: (1) my own experiences as a TL and (2) the study timeline which did not accommodate observations later in the school year. To help counteract the impact of study scheduling constraints, every effort was made to conduct observations within the allotted timeframe when these participants reported being particularly active in their roles. All of the observations took place between November and January, prior to the start of each HTLs’ second semester or spring school term, and data collected from these work shadowing experiences served several purposes.

First, observations of HTLs in action allowed me to see behavior that may be taken for granted and go unnoticed, and therefore be left unreported by the HTLs (Cooper & Schindler 2001, as cited in Cohen et al., 2007, p. 396). As such, observations served as a form of triangulation for HTL self-reports of their roles and responsibilities. Cohen et al. (2007) assert that observations allow the researcher “to gather ‘live data’” of “what is taking place in situ,” thus providing more valid data than interview methods alone (p. 396). As Robson (2002) further corroborates, “what people do may differ from what they say they do, and observation provides a reality check” (as cited in Cohen et al., p. 396).

Second, work shadowing further informed the study questions concerning HTLs’ descriptions of their leadership. Mevorach and Strauss’ (2012) work suggests that the observable behavior of a teacher is an “in-action mental model” (IAMM), or set of visible indicators of the implicit assumptions and understandings the teacher holds about pupil learning that thereby guide the teacher’s practice. Their research has implications for the tacit “mental models” that HTLs hold about leadership, making observation one way to further explore the influences these
positions have on how HTLs describe themselves as leaders, and thus enact their roles.

Third, observations became an important method of investigation in order to answer the study’s questions regarding descriptions of HTLs’ leadership and the extent to which it requires negotiation of dual roles. The study’s theoretical and conceptual framework suggests that particular school structures, cultures, and social contexts are important points of study as they influence teacher leadership, teacher beliefs, attitudes, and agency, and thereby feelings of competence, within shared leadership structures (Beijaard et al., 2004; Collay, 2006; LeBlanc & Shelton, 1997; Mascall et al., 2009; Smylie et al., 2003; York-Barr & Duke, 2004). The framework further suggests that teacher leadership may be a form of brokering as part of a boundary identity trajectory (Wenger, 1998). Observational data allowed me access to the social interactions between HTLs and their roles partners from both teacher and administrator communities of practice.

Finally, observational data are sensitive to contexts and enable researchers to see things that would otherwise be unconsciously missed by participants (Cohen et al., 2007; Yin, 2014). Therefore, work shadowing HTL participants aided and deepened my understanding of contextual influences on HTLs’ roles. As Cohen et al. (2007) suggest, observations allow the researcher access not only to the human setting and its organization of people, but also to the interactional setting, the planned and unplanned, formal and informal social relationships between individuals in connection with that context.

As suggested by Spradley (1979) and Kirk and Miller (1986), I kept three sets of observational data: (1) notes and jottings made in situ, (2) expanded field notes made after initial observations, and (3) memos to record a running record of tentative ideas, ongoing analysis and interpretation (as part of what is described in the section below) (as cited in Cohen et al., 2007). To increase the reliability of field note data, I wrote extended field notes as soon as possible after each observation event (Emerson, Fretz, & Shaw, 2011; Lofland, 1971, as cited in Cohen et al., 2007). I used a semi-structured, predetermined list of themes and categories derived uniquely from interview data for each HTL as a guide for the selection of key components of observed
scenes, events, or interactions (Cohen et al., 2007). This list included categories connected to HTL roles, responsibilities, and reported types of role partner interactions, as well as contextual influences reported by participants. Moreover, in operationalizing the study’s framework, the list included categories for social interaction between HTLs and their role partners. In particular the nature of HTL to teacher, HTL to administrator, and HTL to student or parent interactions were noted along with the directionality of these interactions (for example, when HTLs were engaged in translating faculty needs and interests to administrators, administrative goals and interests to faculty, or when addressing within faculty goals and interests).

I worked to counteract researcher problems of inference, selective attention and memory in observation data through member-checking and triangulation of methods as described in subsequent sections (Cohen et al., 2007).

**Data collection memos.** I utilized memos throughout the data collection period in order to reflect on and refine instruments, trace initial understandings and discoveries, and to facilitate reflection and analytical insight (Maxwell, 2013). Memos helped me to document my emerging understandings of the participants’ school settings, responsibilities, and interactions with administrators, colleagues and peers. Additionally, memos provided a way to record my observations in connection with informal conversations and interactions with participants that were pertinent to my investigation, but happened outside of interviews and direct observations.

In particular, contact summaries after each interview or site visit provided a space to trace emerging ideas, patterns, or connections within and between sites. As suggested by Miles et al. (2014), contact summaries after each interaction proved valuable in developing inductive codes for first round analysis. Throughout the research process, memos also provided a means for engaging in “serious reflection, analysis, and self-critique” (Maxwell, 2013, Chapter 1, The Exercises in This Book, para. 6), as well as tracking issues of validity that arose. Reflexive memos helped me to document emotional reactions and personal connections to the information garnered from interviews and visits in the participants’ settings. In particular, prior to collecting data connected to my own site, reflexive memos helped me to explore my own perceptions of the
TL role in my site and uncover any expectations I might have for what these participants might report about their experiences. In this way I was able to call up potential areas of bias that could interfere with my rendering of observation field notes, in particular. As a former TL in this site, I used these memos to document my own prior experiences. Then, I used this documentation to separate personal feelings and biases from the data collected, and to trace places where I may have led participants during interviews. Throughout the data analysis process, memos also helped me to trace my emerging understandings about the participants and their contexts, facilitating member checks of transcripts and my initial findings or understandings for participant input and verification (Anderson, Herr, & Nihlin, 1994).

In the next section, I detail the means I used for triangulation in order to provide further support for evidence that was predominantly self-reported. Then, I address issues of validity and researcher positionality as I was able to understand these issues during data collection.

**Triangulation**

Triangulation of data in the study focused on a “process of using multiple perceptions to clarify meaning, [verify] the repeatability of an observation or interpretation” and to “clarify meaning by identifying different ways the phenomenon is being seen” (Stake, 2003). To triangulate data in this study, I included multiple participant perspectives (HTLs and HTL role partners) and multiple methods (document review, interviews, and observations) for two purposes.

First, each method and set of participants provided a “check” on the other and helped me to gain a “more secure understanding” of how each participant understands the HTLs’ membership within the school’s communities of practice (Maxwell, 2013). Each method also helped me to interpret HTLs’ interactions with others in their school contexts (Maxwell, 2013). Second, triangulation did not just confirmed data; it provided greater depth of information (Greene, 2007, as cited in Maxwell, 2013). By gathering insights from multiple participants from different contexts who engage in different types of interactions, I was able to put multiple
perspectives and contextual factors in conversation with one another (Greene, 2007, as cited in Maxwell, 2013), discovering where they converged and diverged, thereby allowing for deeper analysis and interpretation of HTL experiences.

**Issues of Validity**

All interview information was self-reported. Document review, direct observations, and the use of multiple participants from multiple levels of leadership within the research settings provided checks on accuracy of information and opportunities for data comparison. In particular, the sequencing of methods provided a way for me to continuously check initial HTL participant reports of responsibilities and factors influencing their positions. Observations took place after interviews, providing a way to compare HTLs’ reports of responsibilities and their descriptions of their roles with data in situ. The focus group interview with HTLs provide yet another means of member-checking initial ideas of patterns and themes I saw emerging in the data.

Holes in participant memory regarding what influenced them to take on the role may have hindered an accurate detailing of why they came to these positions. Providing transcripts to HTL participants for member check several days after the initial interview provided an opportunity for HTL participants to clarify and deepen reported information. Additionally, my own past experiences serving as a Teacher Leader in MVHS and my current experiences working within that site as a teacher presented potential issues of validity.

**Researcher Role and Positionality**

My own role as a former TL in one of the researcher sites and my personal understandings of who I am as a veteran teacher and as a leader may have affected how I worded interview questions and prompts, making them more narrow than open-ended. Additionally, I may have come to data collection more from a theorizing perspective and less from a theory-building perspective (Yin, 2014). My challenges in my own setting and my experiences in conducting a pilot study that informed this research may have caused me to look for particular
understandings, rather than allow understandings of the participants' unique experiences to emerge. Reflexive memo writing before data collection helped me to address these issues by calling them forth and keeping them ever-present during collection and analysis. In addition, while some initial deductive coding categories were developed, each round of analysis allowed for themes and explanations to emerge inductively. I also actively searched for disconfirming evidence for early and initial propositions in data analysis.

To address validity issues associated with working within my own site, I deliberately recruited participants who work either outside of my own content area department and, when possible, outside my grade level purview in order to distance myself from these HTLs' experiences. Understanding that each department is located in a separate wing of the building, seeking HTLs outside my own within school context helped to provide both emotional and physical distance from my own experiences in the building.

As a teacher in one of the research sites, I also am a subordinate of one of the administrative role partner participants. In consequence, this participant may have withheld what he deems particularly negative feelings about the role HTLs occupy within the leadership structure in my school context. Triangulation of data provided ways to reveal such hesitation, and member checking provided an opportunity to deepen the conversation and reveal his understanding of the study's focus.

I also asked critical friends outside the setting to review and provide feedback on my instruments to determine if the questions were truly open-ended. In addition, pilot tests of the interview protocols and member checks of collected data and initial findings helped me to be sure I captured the interpretations of participants, rather than imposed my own experiences and understandings onto participant responses. All interview data was recorded and transcribed verbatim in order to preserve the actual voices and responses of participants and to address potential biases in my interpretations of interview responses. I shared transcripts with interviewees to check for accuracy. Then, by later bringing my interpretations and conclusions back to HTL participants for input and verification (Anderson et al., 1994), I was able to provide
another check on initial findings. Reflexive memos and journaling throughout the process also helped me to trace and explore my reactions and emerging theories. This documentation allowed me to separate myself purposefully from initial assumptions and theories before deliberately looking for alternative interpretations and disconfirming evidence in the data (Yin, 2014).

I was a stranger to one of these settings (CHHS). I gained access to the setting through the approval of gatekeepers—“individuals at the site who provide access to the site and allow research to be done” (Creswell, 2014, p. 188). Every effort was made to become familiar with proper school protocols and procedures. Additionally, I had to rely on administrative knowledge of potential HTLs in this setting who matched the study’s selection criteria. After being given an initial list, I conducted all recruitment activities from initial contact through the end of data collection. However, I cannot be sure that potential HTL participants were excluded from the initial list. At MVHS, I was able to rely on both personal and administrator knowledge of potential participants, ensuring that I recruited from the widest possible pool of potential participants in that setting.

**Data Management and Analysis**

**Data management.** In order to protect participant confidentiality, all data was de-identified immediately upon collection. An identification key was electronically stored on a removable pen drive and kept separate from de-identified data in a locked cabinet in the researcher’s private office. Document, interview, and observation data was uploaded, managed, and stored electronically using ATLAS.ti software on the researcher’s password protected computer. Researcher memos also were created and stored within the software. Back-up files of all data were kept in a cloud drive accessible only with appropriate username and password known only to the researcher.

Attribute codes were used during collection and storage as an aid in organizing each data set into families (folders), groups (sub-folders), and files—by site, by HTL participant, and by data type. These codes were developed for setting, participant and participant characteristics, role
type, data format and source, day and time, and other important information (Saldaña, 2013). A separate, general chronological log was kept to document all data collection, memo writing (including subject/topic), and analysis work in an EXCEL spreadsheet. This log tracked when and what type of data were collected from each site, as well as documented the steps followed in each analysis episode (Miles et al., 2014). Relevant data was linked within ATLAS.ti to aid in within-case analysis and researcher interpretation of multiple sources (Saldaña, 2013). For example, when applicable, HTL interview transcripts were further linked to observation field notes, documents, or other interviews when an action, artifact, or role partner was brought up in that conversation. Researcher memos also were linked to data important to the substance of the emerging analysis or reflection. This step proved useful in creating data matrices, as described in the subsequent section.

Data analysis. I concurrently collected and analyzed data as recommended by Miles et al. (2014) in order to further refine and revise my methods. Emerging understandings and themes helped me to focus each subsequent interview, in particular group interviews, as well as observations. It also allowed for expansion of document collection when appropriate. As I moved through the data collection process, analytical memos based on an initial examination of the documents helped me to track conclusions and patterns as they emerged. This memos also helped me to adjust my interview protocols where appropriate based on emerging information about each school and HTL role context. With each interview and observation, contact summaries and extensive analytical memo writing aided re-examination of emerging understandings that informed the development of codes for analysis as the study progressed (Miles et al., 2014; Saldaña, 2013).

As recommended by Miles et al. (2014), I took each data source through two cycles of coding in order to enhance the depth of findings. In addition, as Yin (2014) suggests, I first utilized within-case analysis before utilizing cross-case analysis. This approach allowed me to develop deep understandings of each case’s contextual influences and the unique experiences of participants within singular cases before looking for particular patterns across cases. While the
study’s conceptual framework was utilized to suggest initial deductive codes, inductive categories were also allowed to emerge to account for other descriptions and explanations not conceptualized as part of the study’s framework, as described in the next sections.  

**First round analysis.** Much of first round analysis was guided by deductively created categories based on initial document analysis. Document review aided in developing a predetermined set of descriptive and process codes (Miles et al., 2014) for the roles and responsibilities associated with the HTLs’ positions. To these, I also added descriptions of functions connected to Domains I through V of the TLMS (TLEC, 2012). In particular, HTL job descriptions informed the creation of a preliminary code list. I also employed descriptive codes to trace the career and development stages of HTLs as the study’s conceptual framework suggests experience is connected to expertise or feelings of agency, and thereby identity development within a particular developmental stage (Huberman, 1993; Beijaard et al., 2004; Berliner, 2004).

Contact summaries were written after each of the initial HTL interviews. Review of these summaries prior to first round coding allowed me trace emerging themes and patterns. They provided a source for codes to emerge inductively (Miles et al., 2014). These included process codes for additional responsibilities and descriptive codes for role identifiers that the HTLs used to describe themselves. Codes were created to trace contextual factors that HTLs mentioned influenced their work. Descriptive codes for influences HTLs reported on their decisions to serve or remain in these roles were also suggested within these summaries and added to preliminary code lists.

After initial coding, interim case summaries were developed for each site to provide a synthesis of what I had discovered in initial round of analysis and to look at the quality of the data I had to support emerging findings (Miles et al., 2014). These summaries also provided suggestions for the reformulation of codes and areas for further analysis. I was also able to explore deeply within case themes and patterns, before analyzing across cases in the second round. Review of these interim case summaries and analytical memos from the first round helped me to refine my code list, synthesizes codes into broader themes and categories that were
emerging within and across sites. These categories helped me to identify and compare how HTLs were employed in leadership activities within each of their settings and what influenced their perceptions of their roles.

**Second round analysis.** During the second round of analysis, pattern coding was used to group initial categories and begin to discover themes and explanations in connection with the research questions (Miles et al., 2014). This coding cycle was used to formulate explanations for HTLs' desires for and experiences in their dual roles and how these roles influence HTLs as leaders. Additionally, second cycle pattern and category codes (Miles et al., 2014) were used to develop themes and explanations for the contextual factors that influence HTL roles. Coding matrices were constructed to aid within-role and between-role response analysis, as well as within-case and cross-case analysis. I constructed a role-ordered matrix for each site in order to both condense the data and make them comparable (Miles et al., 2014). These matrices aided comparison of HTLs’ responses with those of their administrator and teacher role partners. A portion of one of these matrices is provided in Appendix D.

I also employed the study’s conceptual framework to explore ways in which the patterns emerging from my analysis of the matrices were or were not in alignment with the literature. I looked for contextual factors within sites and the nature of social interactions between all participants that Beijaard et al. (2004) and others suggest influence teacher professional identity and teacher leadership (Beauchamp & Thomas, 2009; Curtis, 2013; Katzenmeyer & Moller, 2009; LeBlanc & Shelton, 1997; Little, 2003; Trede et al., 2012; York-Barr & Duke, 2004). I looked for descriptions of the adult relationships or social context within each site and evidence of the perceptions of HTL roles that administrators and teachers hold.

After the second round of coding, I looked for disconfirming evidence in order to strengthen the validity of the findings and provide opportunity for further investigation of anomalies (Yin, 2014). I read through all analytical memos tracing initial themes and emerging patterns, before compiling a list of potential findings. Then, I examined data matrices, again, to determine the quality and amount of evidence I had to support each finding.
The following chapter is divided into two sections that present data from each site: Site A: *Mountain Valley Junior Senior High School* and Site B: *Chestnut Hill Valley High School*. Data presentations for each site begin with contextualizing information about the school setting and descriptions of the HTL positions in which participants currently serve. The remaining subsections detail themes and patterns in the data according to each of the following broad headings: *HTL Responsibilities, HTL Roles, HTL Practice, Benefits, Challenges, and Influences to Serve and Remain.*
CHAPTER 4: Results

Site A: Mountain Valley Junior Senior High School (MVHS)

School context. A large suburban district in the northeastern United States, Mountain Valley (a pseudonym) serves 4,150 students in kindergarten through grade twelve across four buildings: three elementary schools and a combined structure for junior (grades seven through nine) and senior (grades ten through twelve) high schools. Information obtained from the State’s Department of Education website identifies this total student population as 87% white, 4% African-American, 4% Hispanic, and 5% Asian. Two of the District's four schools receive Title I funding. Moreover, school performance reports accessed through this same online source show student achievement scores in the District for 2013-2014 were 83% and 80% in math and reading proficiency, respectively. Both percentages were above state averages. According to this same source, the secondary school, Mountain Valley Junior and Senior High School serves approximately 2,100 students.

The district employs three central office administrators (whose role are connected to instruction): Superintendent, Assistant Superintendent/Secondary Coordinator, and Elementary Coordinator. The elementary schools are led by one principal per building, and the secondary schools have a building-level administrative team comprised of one principal per junior and senior sections of the building who leads with help from one assistant principal in the junior high section and two assistant principals in the senior high section. The District employs 252 teachers, who in addition to their classroom duties, can serve as leaders within their subject or content area in a formally defined position known as: Teacher Leader.

History of the position: from Department Head to Teacher Leader. Newly hired central office administration changed the title of this HTL position in 2009 from Department Head (DH) to Teacher Leader (TL). The 2009 title change of this formal position constituted a shift in the expectations, roles, and responsibilities signaled by a new requirement for annual application to the TL position and changes in the overall purview of most TLs. At the elementary
level, the positions of grade level Team Leaders were restructured into cross-grade level subject area TLs.

In the District, thirty-four teachers hold a TL position and of those teachers, twenty hold some purview in the secondary setting within the district. Five serve grades K-12 in itinerant subject areas such as physical education, art, and music. Four serve only senior high grades (10-12) in the core content areas of math, science, social studies, and language arts. Five serve only junior high grades (7-9) in these same core content areas. Six TLs oversee grades 7-12 departments in elective areas, including business and technology education, and gifted support. Teachers who hold these positions have various levels of classroom experience. The most senior TL has 24 years of teaching experience, and the least veteran among the TLs has 6 years of classroom experience. Three core content area TLs participated in the study, one with purview in the junior high portion of the building, and two with purview at the senior high level (see Table 1).

Building administration meets once monthly with TLs either in the morning (before school) or in the afternoon after school. TLs are provided time each Friday before students arrive to meet with their department faculty for 25 minutes during what is called Seminar. All TLs teach 100% of their contracted school day teaching schedule, which includes six instructional periods and one duty period. TLs are not provided class release time for fulfilling duties connected to the position, but they do receive financial compensation in addition to their contracted teaching salaries. TL responsibilities, beyond the weekly meetings with their departments, are fulfilled after or before school. The next section will outline these duties and responsibilities as reported by participants in this setting whose names have been replaced with pseudonyms.

The job description. District administrators have, in their words, “used Teacher Leaders more in the last few years” to aid curriculum re-alignment and the instructional implementations required by new state standards and assessments. As one administrator role partner, Principal Keller suggested: “I think it’s kind of been a gradual increase in responsibility from when that Teacher Leader role was first started to where it has evolved to now” (personal communication, January 7, 2016). Central office administration issued a new job description for
the TL position in 2011. However, despite participant references to this document as a guide to the responsibilities of TLs in the District, many of their reported duties are not included, suggesting that the TL role now extends beyond the one implied in this document and that the TLs’ roles are more fluid and evolving with regard to their responsibilities and purposes in the building.

The Teacher Leader Intent/Application Form is comprised of a general introductory statement about the position’s scope and purview followed by a list of the seven Teacher Leader Model Standards (TLMS) (TLEC, 2012). The introduction reads: “specific tasks will vary by subject, department, curriculum cycle, strategic plan goals and annual district focus.” In total, the information provided in this document suggests that the responsibilities and duties of a particular TL will align with the attributes, knowledge, and functions suggested by the TLMS and that these may be ever-changing.

When asked to identify the responsibilities of a TL at MVHS, all TL and administrator participants used the Teacher Leader Intent/Application Form to describe what they perceived to be the tasks of TLs. For example, about the form, Assistant Principal Jackson said:

I don’t think there’s anything official. When that person signs up and applies to be a teacher leader, there’s a bullet list of twenty different descriptions possible, possible job descriptions that that person would be doing. But I would say the best thing for anybody new to do is touch base with another teacher leader in another department to find out, “Hey, what should I be doing?” (personal communication, December 1, 2015)

In the words of Elizabeth, a TL in Principal Jackson’s building, the description is “a piece of paper that comes out. It’s very generic in that ‘here are some duties,’ and you sign it” (personal communication, November 11, 2015). While these participants believe the job description to include specific duties, other participants reported differently. Jarred, a senior high TL colleague of Elizabeth’s, reported the job description is:

more a set of attributes and traits with a catch-all: ‘anything the administration wants you to do’...as opposed to the teacher leader will do x, y, z, q, r, s, t. . . . It’s just covered by ‘teacher leader will do anything.’ (personal communication, November, 12, 2015)

While Linda, a teacher who works with Elizabeth in the junior high section of the building said of
the form as a description of the TL position:

I think it varies by year, and . . . I don’t think that there’s a very clear definition. So I believe that this [position] is, “this is what we need now, so this is what you are to do now.” Sometimes that involves putting more on the plate and sometimes that involves putting less on the plate. (personal communication, January 26, 2016)

Due to its lack of “clear definition” and its “generic,” “catch-all” nature, the position seems to have been shaped by the practice of TLs in interaction with each other and their administrator and teacher role partners, depending on situational needs within the District and academic departments.

Influential contextual factors. Participants reported a core set of responsibilities for these positions that were very similar. However, there were slight differences depending on the department’s academic content areas, number of faculty, and association with a required state assessment. The size of the faculty and content area reportedly affect budgetary and teacher scheduling responsibilities, for example. TLs responsible for departments associated with state testing described responsibilities for data analysis and interpretation and sometimes test administration schedules, unlike other TLs. TL and administrator participants also reported that multiple “big ticket items coming down the pike” from central office administration in the last few years have intensified the number and scope of responsibilities of TLs in this setting (Jackson, personal communication, December 1, 2015).

The next subsection includes reports of the TL responsibilities that are part of this shared understanding. Then, the succeeding section identifies ways in which TLs and other participants described a more complex set of informal roles TLs occupy in this context. These roles seem to extend beyond formal duties and so have implications for the way in which TLs experience their positions in MVHS.

HTL responsibilities. Participants consistently reported a similar set of duties and responsibilities that TLs must fulfill as part of their positions. These tasks or functions can be separated into two categories: (a) those indirectly or unrelated to instruction, and (b) those directly related to instruction. In individual interviews, all of the TLs used corresponding language
to describe these duties, suggesting they similarly experience these more formal TL responsibilities. In the focus group interview, participants labeled the group of responsibilities indirectly or unrelated to instruction: “managerial.”

**Managerial responsibilities.** As part of their position, TLs reported engaging in the following activities: creating and overseeing their department budgets, managing textbook inventories, requisitioning supplies, communicating information relayed by administration to department members, and sometimes, recruiting students for courses or particular programs related to particular content areas. Additional TL duties indirectly related to instruction that TL participants reported as belonging to this category included the following: assigning student teachers to faculty members, as well as overseeing particular co-curricular programs or awards, content-area related competitions or contests, and related clubs or activities. Document evidence, such as budget summary worksheets, textbook requisition forms, and bi-weekly Department Seminar Reports confirm these reported responsibilities. Despite their absence from the Teacher Leader Intent/Application Form, these recurring duties were reported consistently among TLs and their administrator and teacher role partners at MVHS.

Interviewees used adjectives, such as “clerical,” “logistical,” or “business-oriented” to classify these duties. As Jarred qualified in the TL group interview, this “first grouping” of TLs’ responsibilities is “literally the administrative paper work end of it.” When describing himself fulfilling these functions, he gave himself the title, “digital or paper messenger” (personal communication, November 12, 2015). Elizabeth labeled her role in this category as “almost like being a secretary” or “manager, and that’s that paperwork portion of it” (personal communication, November 11, 2015). Other descriptive phrases TLs used to characterize these particular duties, such as “the small stuff” and “the normal teacher leader stuff” (Stacey, personal communication, November 13, 2015; Elizabeth, personal communication, November 11, 2015) suggest that TLs in this setting are aligned in their understanding of these functions of the position as regular, but perhaps less important than those in the instructional category of responsibilities.

Principal Keller relayed that he believes “managing the logistics of budgetary—textbooks
and all that” are “components of the department chair” position or “the old guard” that has “[hung] on” since the transition from DHs to TLs. He believes that administration has “come a long way with teacher leaders,” saying: “I feel that [Mountain Valley] has taken some very proactive steps in empowering teachers to be experts and true leaders in their building” (personal communication, January 7, 2016). Similar to TLs’ descriptions, Principal Keller’s comment seems to separate managerial duties from instructional responsibilities that may be more an indication of leadership, a dichotomy that Elizabeth reports in this way:

There’s the personal and then there’s the objective. Like the first category (managerial responsibilities) is the objective part . . . kind of the objective things you just have to do. And then, there’s the subjective part of it that’s all like that professional, touchy-feely stuff. I mean, I want to say leadership, because...those are all things we do because we are the leaders. (personal communication, December 21, 2015)

Here, the use of the word “subjective” implies that TLs and their role partners clearly separate their managerial and instructional responsibilities from each another. However, in practice, the managerial may be much easier to identify and delineate than the instructional category of responsibilities that Elizabeth seems to align clearly with leadership.

**Instructional responsibilities.** This subsection details the instructional category of TLs’ responsibilities, as well as highlights TLs’ desires for these duties to be more central to their positions. In addition, this subsection ends with a presentation of data that connects these responsibilities to TLs’ content area expertise.

TLs in this context fulfill several duties more closely aligned with teaching and learning. These included facilitating the following processes: developing and revising curriculum, common assessments, and course scope and sequences; selecting textbooks and instructional resources; and analyzing and interpreting student performance data on state and local assessments. Other duties that participants mentioned as instruction-related included: mentoring or coaching teachers (formally and informally), scheduling or rostering teachers into particular courses, planning and facilitating professional development, and addressing student or administrator concerns about other teachers. TLs also mentioned sharing instructional resources and facilitating the sharing of
best practices or instructional strategies as part of their position, often in connection with the
review of student performance data as it may indicate the need for revising units or individual
lessons. This category, Instructional Responsibilities, aligns most closely with Domains I-V of the
TLMS (TLEC, 2012), and therefore, with the TL job description as indicated in Table 2.

Table 2

Mountain Valley Junior Senior High School Teacher Leader Responsibilities Aligned to Teacher
Leader Model Standards Domains I-V

<table>
<thead>
<tr>
<th>Teacher Leader Model Standards by Domain</th>
<th>Reported Teacher Leader Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain I: Fostering a Collaborative Culture to Support Educator Development</td>
<td>Facilitating sharing of best practices</td>
</tr>
<tr>
<td>and Student Learning</td>
<td></td>
</tr>
<tr>
<td>Domain II: Accessing and Using Research to Improve Practice and Student</td>
<td>Analysis/interpretation of student performance data, sharing instructional</td>
</tr>
<tr>
<td>Learning</td>
<td>resources</td>
</tr>
<tr>
<td>Domain III: Promoting Professional Learning for Continuous Improvement</td>
<td>Planning and facilitating professional development</td>
</tr>
<tr>
<td>Domain IV: Facilitating Improvements in Instruction and Student Learning</td>
<td>Mentoring new teachers, informal coaching of colleagues</td>
</tr>
<tr>
<td>Domain V: Promoting the Use of Assessments and Data for School and District</td>
<td>Facilitating the creation of common assessments and review of assessment</td>
</tr>
<tr>
<td>Improvement</td>
<td>data</td>
</tr>
</tbody>
</table>

Note. Adapted from Teacher Leader Model Standards, by Teacher Leader Exploratory Consortium, 2012.

Desire versus reality. While the TLs see instructional responsibilities as part of their
positions, participants cited logistical and structural constraints that inhibit these responsibilities
from becoming a more central part of their positions—a reported desire of TLs. For example,
Elizabeth reported that while she sees sharing best practices and mentoring or coaching teachers
as part of her job, she feels as though there is not “enough time” or “the structures” are not in
place for her to fulfill that part of the position. She reported:

As a teacher leader I think that that should be something that I’m doing more. Otherwise,
I don’t, I feel like, in a way it’s just being a paper pusher or like the middle man for the
District, to collect all the district info [sic] that they need. (personal communication,
November 11, 2015)

Stacey, another TL, reported that she feels the “managerial and logistical duties” often “take
precedence” over what she sees as “the more important stuff,” namely working with the teachers in her department on improving lessons:

In my dream world, I would love it to be that I’m more— I don’t think they’ll let me, but if I could have some time during the day to be more of a coach… and to maybe go into the classrooms more… I really still wish I were now doing more encouraging lesson study. (personal communication, November 13, 2015)

Stacey further explained this dynamic in the group interview with her TL colleagues, saying:

The priority within department stuff… is the deadlines, like the budget—but that’s all in that first category that we define as managerial or logistics. So then what doesn’t get done, and is what potentially could have the greatest impact, is the—whatever we’re going to call the second half—the subjective. Because that’s the stuff that we can let go of… because there’s no deadline… and it’s more challenging. (personal communication, December 21, 2015)

In fact, Stacey also reported a lack of confidence in this part of her position:

I am not confident in my ability to inspire the teachers to tackle issues of how to create more effective lessons. I get intimidated by just their attitude… It’s much easier for me to plan a department meeting where it’s like, “Okay. We’ve got the [this] test on Tuesday. Make sure your curriculum maps are done.” Just the nuts and bolts, not the, “Okay. Let’s do some self-evaluation or sharing of best practices.” (personal communication, November 13, 2015)

Document evidence confirms TLs’ claims about their instructional responsibilities.

Department Meeting Seminar Reports detail discussions about common assessments, curriculum alignment to standards, and examination of state test results. For example, Stacey included the following statement as a “next step” in the “on-going initiatives” section of almost every monthly seminar report she submitted for 2015: “I would like the SHS math teachers to begin [emphasis added] a lesson study following a format… to improve some of our lessons.”

Similar to Elizabeth, Jarred reported that time was an issue, noting: “the fundamental problem… is, ‘When is there time to do that?’” He further explained a different challenge in fulfilling this part of his TL position as it relates to his Department context:

One of the things they’ve [administration] talked about is if teachers are struggling you’re able to go in and help. Like re-direct them and those sorts of things. … For me, I understand science. I think scientifically. I know my curriculum. But on the flipside of that is… in science I can’t know chemistry, and biology, and physics, and anatomy, and all the things we teach. So when it [the job description] says like “expert in the material taught within your department,” I, uh, I can’t. So that’s not applicable to me. (personal communication, November 12, 2015)
So while all TLs reported collaboration or sharing best practices with their faculty as part of their responsibilities, none of them described this activity as regular or as recurring as duties.

**Drawing on TL expertise.** All three administrator role partners explicitly mentioned instruction-related duties as part of their expectations of TLs and related TLs’ content area expertise to the capacity for fulfilling such responsibilities. For example, Principal Keller reported that TLs were “instrumental in leading, evaluating, specific content area” (personal communication, January 7, 2016). Principal Matheson reported that “probably the number one thing a teacher leader needs to promote is instruction and planning” (personal communication, December 1, 2015). He described TLs in his building as responsible for the following:

Sharing what are the best nuggets of knowledge that are coming from the department and share that out—have a professional learning community in its highest sense—is something that a teacher leader has to facilitate in order to move a department ahead. They’re meeting weekly to share best practices because the teacher leader bought in, felt that that was strong platform to have their department members collaborate, and then have their department members run with it. (personal communication, December 1, 2015)

Principal Keller and Assistant Principal Jackson also detailed more specific functions of TLs in relation to the standards-aligned system of assessment and curriculum:

They are instrumental experts in . . . making sure that our curriculum maps are in alignment with standards, making sure that we are in line with eligible content, with [State] Core [Standards]. That is something that we rely heavily on teacher leaders to be able to communicate that with us. (Jackson, personal communication, January 7, 2016)

In fact, Keller specifically aligns these TL responsibilities to educational leadership: “We have lots of discussions with them that pertain to curriculum, curriculum alignment, um, some of those educational leadership areas that they really focus on” (personal communication, January 7, 2016).

These administrators suggested that the transition from DH to TL has included more responsibility for “leadership” and collaboration among faculty related to instruction, such as sharing best practices as a formal responsibility. However, the TLs’ reports of desires and challenges imply that TLs experience difficulties in fulfilling this part of their position. And yet, their
teacher role partners reported that these exchanges do happen. While administrators’ responses seem to indicate sharing best practices as a formal responsibility, teachers reported sharing instructional ideas with or seeking advice on improvements from TLs as less a relationship between TL and teacher and more a teacher to teacher interaction—thus, a product of more informal collaboration. When asked if TLs had responsibilities related to instruction besides development and revision of curriculum and assessments, teachers in the group interview responded:

Lori: Mentoring, I would say . . . She’s always very willing, she always gives up her time. . . . And when we have our department meetings, we have been throwing around different teaching strategies. I know she has posed a few. . . . Yeah, as a mentor, she has been there for many of us.

Linda: I think that with my teacher leader as well, but I’m not sure that that is specific to her because she’s the teacher leader. I feel like that’s just who she is as a colleague and as a teacher.

Lori: Just a colleague, yeah.

Linda: She’s probably in her room right now, and I could probably go down there and ask her a million questions, so she would make me a cup of coffee and answer them. I don’t think that that’s her performing the duties as a teacher leader. I think that there’s just a natural personality that steps into that role. As I keep saying, since it [the TL position] is so undefined, if we were to define it, I’m not sure that those things would fall under the definition or not. (personal communication, January 26, 2016)

Linda’s comment implies that her understanding of the TL’s position does not include informal mentoring or coaching, and that “personality,” more than responsibility, determines the extent to which TLs perform this function. Jarred’s teacher role partner, Kevin reported that the subject specialization of their content area is the reason Jarred does not serve in this informal capacity for most of his department. Rather, Jarred only provides this kind of aid when he has taught the same subject as a teacher in need (personal communication, January 26, 2016).

TLs similarly described this dynamic. For example, Elizabeth explained:

If I find something that I think would be helpful, I share it. And, I don’t just share with my department, I share with anybody. . . . I think I would do that anyway, but I think that I try to find things to help people more [emphasis preserved] as a teacher leader. . . . I feel that it is part of my responsibility as a teacher leader to do it, because that’s what I’m supposed to be doing. (personal communication, November 11, 2015)

Here, she confirms her role partner’s claim that TLs may share instructional ideas more so as
“colleague” (“I would do that anyway”), but also reveals her belief that as TL she has a responsibility to do so “more.” Stacey and Jarred reported feeling that this area of their position was a “blurred line” for them. Neither of these TLs were certain if they provide this kind of assistance or engage in this kind of sharing because of their position. As Jarred reported about sharing instructional practices with teachers in his department: “I think that’s just something that any department member can do. And that’s where I go to that blurred line. I would do that if I was a teacher or a teacher leader” (personal communication, December 21, 2015). Likewise, Stacey noted:

Teachers have come to me . . . if they’re having trouble . . . [but] that’s more informal. I don't see it more because I’m a teacher leader, but more of a fellow teacher who might have ‘been there, done that.’ (personal communication, December 21, 2015)

To summarize, combined reports associated with TL responsibilities suggest that there are particular managerial and instructional “leadership” tasks TLs are expected to perform. Participants described many of the duties in these categories with consistency, suggesting a shared understanding of the general function of the position. However, these same reports suggest TLs experience tension between these two diverging categories of positional priorities: while the Managerial category of duties are clear, regular, and often prioritized, they are understood as less important than the Instructional category of leadership tasks that are unclear, subject to structural challenges, and enacted with diffidence and infrequently.

After coding and analyzing the two categories of more formal duties and tasks of TLs, I further examined participants’ responses for the informal ways teacher leadership is described in this setting. This language suggested that TLs’ experiences of and practice within this hybrid position extend beyond their more formal responsibilities. I found several broader functions that TLs serve for teachers and administrators in this setting. These are described in the next section.

**HTL roles.** The responsibilities outlined in the previous section are derived from the formal descriptions of the position that are communicated in writing or verbally from administrator to TL, and between TLs and other teachers. These descriptions seem to speak to the what of teacher leadership in MVHS—the expected outputs of TLs. However, definite identifiers (nouns)
accompany descriptions of TLs’ responsibilities in the data that suggest TLs serve numerous functions within their school’s leadership structure and within their individual departments. These descriptions speak more generally to who TLs are to those with whom they work. Furthermore, such language also highlights how others see the purpose of TLs and how TLs see themselves in enacting their leadership responsibilities, and thereby how they experience being in a position of leadership.

I saw three overarching roles (a coding category) that TLs occupy as part of their positions: (a) Implementer, (b) Initiator, and (c) Advocate. The exceptions were participant responses that suggested a simultaneous communications relationship or “bridging,” where the TL was serving what many participants deemed a Middle Man role (an In Vivo code). The next subsections provide data that illustrate these patterns in TL Roles and the processes TLs reported utilizing in fulfilling them.

**TL as Implementer.** TLs and their administrators reported that TLs are Implementers of District goals, initiatives, or visions. In this way, TLs become conduits for administrative directives, reporting information about initiatives to department faculty and overseeing completion of required associated activities. As Jarred reported: “if administration asked for something, I’d do it. So I kind of just [take] the approach of, ‘my job is to keep things running smoothly because our administrators are going to tell us what they want.’” He further explained that the requests he speaks of are not coming from building administrators: “I think it’s—an edict comes down and typically it comes from our central office to our building. And then, they [building administrators] tell us to implement it” (personal communication, November 12, 2015).

When asked directly about the role of TLs in his building, Assistant Principal Matheson, Jarred’s building administrator, similarly attributed the “central administrative level” with “[forming] the guidelines . . . in a general sense” for TLs. He extended his description saying the job of TLs is “to obviously lead departments in ways that are current with what the District’s visions are.” He explained this “top down approach” using a current District initiative:
We [central office and building administrators] meet twice a year minimally, at the beginning of the year, with all teacher leaders to lay out our vision. And so then, at the building level, I know [principals] facilitate those teacher leader meetings monthly. And those are the types of things where we talk about . . . what's going on with the vision, what's going on with the goals of the year. At our last meeting for example, the common assessment [data analysis] template went out. And then . . . each department leader, each department head went back to their meetings, explained the form, explained the vision, um, and then facilitated completion of that. (personal communication, December 1, 2015)

During observations in this setting, I saw the template Assistant Principal Matheson mentioned and asked Jarred where it came from and who created it. In his response during that experience, Jarred told me about the same meeting detailed in Matheson’s response as a vehicle for communicating these initiatives. Jarred replied that “sometimes, [he] wonders about the purpose” of those meetings. He explained that the agenda is set and given to TLs ahead of time. To quote Jarred, TLs mostly “sit and listen as administration reviews their goals for the coming year. We [TLs] ask questions, but otherwise it's mostly a presentation by administration” (personal communication, November 16, 2015). Jarred’s and Matheson’s responses pose TLs primarily as audience in the described meetings, rather than as contributors. Elizabeth added later that “[her] job as a teacher leader, in that respect, is to be that messenger,” and as such, identified herself as “almost like being a secretary” (personal communication, December 21, 2015). These descriptions are examples of how TLs were described as “communications liaisons” (Kevin, personal communication, January 26, 2016) for central office goals, and the TL position described as one of facilitation and reactivity, rather than one of initiation and proactivity.

Teachers provided further illustrations of TLs serving this function or HTL Role.

Linda, a teacher in Elizabeth’s department, relayed that she did not “think they [TLs] have the authority to” or “[get] to make a decision.” Rather, she said in her view “the teacher leader . . . is the liaison.” Later, Linda added: “I also think the principals view the teacher leaders as liaisons because frequently we'll enter a meeting and [Elizabeth] will say . . . “[Principal Keller] has approached me about this and wants me to bring it to the department” (personal communication, January 26, 2016). Lori, Stacey’s teacher role partner, similarly referenced TLs in the role of administrative communications liaison in the setting:
Like I said, even with the [current initiative] . . . I think those decisions are not ours, they're not the teacher leaders, but those decisions are made elsewhere, and then we carry them out when they're suggested by the TLs. (Lori, personal communication, January 26, 2016)

Other reports of TLs serving in this Implementer capacity included identifiers such as “liaison” and “messenger.” These and other nouns were associated with particular processes, such as “gather” from administration and “bring back to” teachers. Words and phrases such as “justify,” “get buy-in,” “explain,” and “interpret” posed TL Implementers as individuals who must not only help teachers understand administrative initiatives, but also convince teachers of the value of these directives. Other data suggested relationship building is necessary for TLs to enact their Implementer role, as well. As one TL reported, “the more you can win faculty over the more they'll work with you” (Jarred, personal communication, December 21, 2015). An administrator emphasized that without “that relationship, it’s harder to get teacher buy-in” (Matheson, personal communication, December 1, 2015).

Other participant metaphors seemed to position TLs as physical “buffers” or “filters”: individuals who “soften the blow” of central office mandates. In this way TLs reported having to “shield” teachers in their respective departments from “frustrations and kickbacks” in connection with administrative initiatives. For example, Jarred described these processes this way: “The administration tells the principals something, they tell us, and then I’ll buffer it” (personal communication, November 12, 2015). When asked how he “buffers” or “filters,” Jarred further elaborated using requested curriculum revisions as an example:

Filtering from the stand point of they want you to do X, Y, Z, and A, B, C. You know all they [administration] really want is X, Y, and Z they're just throwing A, B, and C in because that's what they do. You tell you're department, “X, Y, and Z, you turn that in.” [Administration is] happy because that's what they wanted. You have to filter out some times every request they want from your department to keep them from, like there was a period of time they wanted different versions of the curriculum out like every 2 years: “Here's a new format, here's a new format.” I flat out just told people they need new copies of it, I didn't put it in the new format they wanted . . . and I just put a disclaimer: “[Content area] is different because we have [specialized] periods. We cannot follow the new format you gave us.” I was a buffer for my department by being willing to take a battle on. [Administration] never did [battle] because they bought my argument. . . . So that's a buffer from what administration wants; sometimes we have to fight that battle and prevent our teachers from having to fight the battle themselves or do the extra work that
really won't help their kids or their teaching in any way (personal communication, December 21, 2015)

Elizabeth described “filtering” for her department as a practice of actually taking on particular work herself in order to save her department members from additional burden, saying:

I think with knowing how frustrating it can be especially in [our content area] . . . that as tested subjects we’re always the first ones to be approached in change because we’re the ones that are tested. I know that there are going to be frustrations and kickbacks. So sometimes I just kind of ease into it, saying: “Okay here's what I need from you, and this is why we’re doing it.” A lot of times, I'll try to do enough of it—like recommendations, that's a lot of work for a [specific grade level] teacher, or [another grade level] teacher so I'd do . . . filtering definitely, for sure. . . . I’d do a lot of the front end work so they can do the minimum. (personal communication, December 21, 2015)

Another TL similarly described taking on extra work for the sake of her department members as “mitigating.” To quote Stacey: “As a teacher, I liked not having to do busy work just because it was busy work. So I want to give that back to the members of my department. So I kind of adapted into that role” (personal communication, November 13, 2015).

In their role as Implementers, TLs reported experiencing feelings of being “dumped on” and “overwhelmed” by multiple initiatives over which they don’t have “ownership.” In the group interview, these participants reveal the implications of these emotions for how they go about fulfilling this function:

Jarred: To me the problem is, “You tell us we’re doing this.” I don’t have any buy in because I had no say. So I’m going to implement it [administrative mandate] to the minimum standards that I feel because if I don’t see there’s a huge benefit in my department, or for my kids, I’m not going to devote hours of people’s time to do something that you [administration] haven't sold me has any value.

Stacey: This curriculum mapping that we're doing and all of that stuff on [name of software], we have no idea how this plan was developed so we have no ownership of it. We're not passionate about it. So when our teachers say, “This is just one more thing for us to do,” I'm not really invested in it to say back to them, “No this is really important. You guys can use this as a great teaching tool.” It's just, “Let's go through it. . . . I'm not going to disagree with you. We had no part in development on this.”

Interviewer: So when there's no ownership, you're saying that affects how you, as a teacher leader, go about actually implementing the initiative?

Stacey: We're not engaged.

Elizabeth: Well, one thing that I did, when they were telling us to figure out what we wanted to do with [the current initiative], or if we had ideas, I typed up ideas. Then, when we met with [Principal Jackson] I was like, “Oh wow. They've [administration] actually
done some work with it already, but they're not telling us [TLs] what they're doing.” So we
don't know what the status is, where the plan is headed, at what part we are. And then all
of a sudden, we show up and there's a whole bunch of steps, like, “Do you want us . . .
just to disseminate?” And that's that administrative part. (personal communication,
December, 21, 2015)

When I asked the administrative role partners how TLs might handle teachers who resist
their efforts to implement initiatives in their departments, these participants referenced the TLs’
lack of positional authority as the reason TLs must employ a particular leadership tactic. As one
administrative role partner described it, if when implementing the TLs meet with resistance, they
must be able to "justify [the initiative] with their own passion," "providing rationales" (Jackson,
personal communication, January 7, 2016). Another administrative role partner described the TLs
as “implementers” who are "buying-in" and "valuing those initiatives" that come from central office
so that they can "make a case" for them with their departments (Keller, personal communication,
January 7, 2016). These responses, when combined with previous TL reports, suggest that TLs’
abilities to fulfill their roles as Implementers are compromised when directives come from central
office, with little information for, or input from TLs initially.

Other responses indicated that this part of the TL job requires certain attributes or
qualities. For example, Matheson, an administrator, referred to TLs as having “a certain
personality” and “charisma.” He suggested this “personality” facilitated the relationships TLs must
build, as discussed in the previous subsection. Interestingly, this assistant principal described
relationships and “having difficult conversations” as a challenging part of the TL job. Because of
this challenge, he thought that TLs need what he called a “natural leadership quality” and an
“innate ability to lead and navigate difficult conversations” (personal communication, December 1,
2015). He questioned whether or not all of his TLs have this “personality” and are adept at
navigating “difficult conversations.”

Other participants referenced attributes of TLs that connect with relationship building. For
example, in an interview with Assistant Principal Jackson and Principal Keller from the Junior
High, they described what they wanted in a TL:

Assistant Principal Jackson: I want someone who is hard-working. Because there is a lot
of, like I said earlier, there is a lot of responsibility put on that person. Someone who connects well with other department members, um, somebody that has good leadership skills are all qualities that we're looking for.

Principal Keller: People have to believe in them.

Interviewer: How will you know that? How will you figure that out?

Assistant Principal Jackson: I think it's just, teachers are going to this person seeking ideas. It's almost like a natural quality of this person that teachers are seeking them out, "Hey, what do you think of this? Do you think this idea would work?" It's just somebody who's knowledgeable in their content area. (personal communication, January 7, 2016)

The cited examples indicate an intersection between relationship building (as a process, quality, and skill), TLs' expertise, and leadership. TLs are described as possessing “natural leadership” abilities when connecting with department faculty members who seek them out for advice or support, perhaps due to their content area expertise. TL and administrator participants consistently reported that this role or part of fulfilling the position of TL is the most difficult because, as one TL participant suggested, it involved the “human element” or “human relations” (Jarred, personal communication, November 12, 2015). Another TL attributed the difficulty of this part of the job to her lack of skills as a “motivational speaker,” saying that sometimes “it’s the attitudes that are hard to handle.” As Stacey described it: “I’m not good at giving that locker room talk” that would inspire fellow department members (personal communication, November 13, 2015).

From administrators’ perspectives, TLs had some latitude when implementing particular District initiatives or action plans in their departments. For example, Assistant Principal Matheson noted:

It comes from a top down approach in a sense. But, it also empowers the teacher leader to have a voice in the vision, and then they're the ones um, who are going to interpret that to each individual department. It looks different. It looks different in the math department from the science department, to the language arts department, how that [vision] is interpreted. (personal communication, December 1, 2015)

Junior High Principal Keller noted similarly: “[Administration] kind of leaves it up to the teacher leaders then to take it to their departments and say, ‘Ok, what’s this going to look like for each department?’ There is flexibility there” (personal communication, January 7, 2016). During my
work shadowing of Jarred, I witnessed and documented in field notes the following exchange he had with a teacher concerned about the sequence of her common assessments compared to other faculty in the department:

They talk briefly about how, for the science courses, it is “hard to work quarterly rather than by unit.” Jarred relays a story about the past superintendent giving him difficulty when Jarred suggested that quarterly assessments were not as practical for his teachers as unit-by-unit assessments. He explains to the teacher that this superintendent fought him on this point, and when later a new assistant superintendent was in charge of this data, he heard Jarred’s concern. “He was Ok with it” by unit, Jarred tells her. Jarred finishes, telling her not to worry: “Whatever works with us is what I want us to do.”

The phrase “whatever works for us” implies Jarred may be adapting an original directive concerning student assessments, as a result of conversations with administration—communication that indicates TLs in this setting are not just receivers and facilitators for administration, but also Initiators of ideas or changes.

**TL as Initiator.** Although they seem most often to be Implementers, the TLs in this setting were also described as Initiators of ideas, actions plans, and communications that come from their departments. Examples of changes that TLs reported initiating or facilitating on behalf of their departments included: shifting course sequences or requirements, creating new courses, requesting increases in instructional resources and equipment (or budget allotments to provide these resources), and determining changes in teachers’ course assignments or schedules. Upon further analysis of participants’ descriptions of these processes, I found identifiers such as “voice of the department” and “advocate” that suggest, while TLs may initiate communications about these changes or action plans, they are not necessarily acting independently of their departments. Rather, in the role of Initiator, TLs are acting on behalf of teachers. Therefore, while TLs may independently initiate some of the aforementioned changes or initiatives, they may also be serving as Advocates for ideas and action plans that originate with department faculty—the “connection to the teachers” (Elizabeth, personal communication, November, 11, 2015), those who “fight for their departments” (Jarred, personal communication, November 12, 2015).

In fact, in the quoted interview excerpt below, Jarred implies that he serves all three functions: Implementer, (independent) Initiator, and Advocate (for the department).
So they [administrators] want the teacher leader to be there to just be that person who can help them make the teachers the best they can and implement the best that they can. . . . So from just a building standpoint, you want teacher leaders that are going to be motivated because they're [administrators] not going to throw everything at you. They want you to take initiative and do things. They want you to make your department the best that it can be. . . . I can say we had a principal once who wouldn’t have understood anything in science. So it was to pretty much to be the voice for science. I believe that is very much a, “we [administrators] want you to make your department better. (personal communications, November 12, 2015)

Interestingly, all three administrative role partners mentioned that a TL must have the “trust” of department colleagues, describing this attribute as one they looked for in TLs. Other qualities that TLs identified in themselves or that role partner participants connected to TLs included: “expertise (or “knowledgeable”) in the content area,” ability to not “get caught up in personal feelings,” “passion,” “dedication,” and “motivation.”

**TL as Advocate.** All three TLs used versions of the descriptive phrase: “voice of the [department].” Similarly, teacher and administrator role partners also used this term to describe TLs in this setting. This language suggests that others see, and that TLs see themselves as “representatives” for their departments with administration (Kevin, personal communication, January 26, 2016).

Participant reports of TLs as Initiators contained associated identifiers and accompanying processes. In particular, all administrators, teachers, and TLs consistently employed the term “advocate” (both in noun and verb forms) as they described TLs. These descriptions were related to others in the data: “ombudsman” and “problem-solver,” or someone who “fulfills the needs of the department and the kids” and “does what’s best for my department and for the students.” However, participants most often referenced TLs as Advocates in relation to teachers, rather than students or families.

To quote Jarred: “I'm trying to advocate for my, for my colleagues. . . . I'm going to advocate a lot for them when it comes to the department” (personal communications, November 12, 2015). His TL colleagues explain this role in more detail when asked to describe themselves in their positions, as illustrated by the following interview excerpts:
Elizabeth: I'm a confidante. I do have conversations with people, you know people who are struggling with an idea. A collaborator, for sure. We do a lot of team planning. . . . Ombudsman. I get a lot of complaints. I'm kind of the one that, "Hey, will you ask them [administration]?” Or, “Hey what are we going to do with?” I kind of listen to a lot of those concerns and then figure out how best to approach them. Or maybe, just go talk to the administration about it . . . if it's a department concern . . . so I'm a voice for the department, maybe because I will go to them [administrators] and say, “Hey we need this.” And so, I think that I have become that voice. (personal communication, November 11, 2015)

Stacey: I want them [department members] to know that I am here, whether it be something as simple as, "Can you order me this supply?” Or, “How do I get reimbursed for this?” to "Hey, I'd like to create a new course.” Or, "I have a student that is doing this, what can I do?” Some of the teachers know that they're getting scrutinized by [Principal], and just need to vent a little bit, or they feel the need to share with me their teaching curriculum, their materials, to verify that they're doing what they're supposed to be doing. . . . They know that I'll do whatever they need. I'll provide support for them. . . . They have shared with me any concern that they have, or situation that they have, or desire that they have. . . . That's my job. (personal communication, November 13, 2015)

When asked about the benefits of the TL position, Assistant Principal Jackson replied: “I think you always have that one person fighting for what that department needs—that advocate that's always sticking up for you [teachers], um, and your needs” (personal communication, January 7, 2016). In a separate group interview, teachers who work with these TLs expressed similar sentiments, saying:

Lori: What I see . . . I definitely see our teacher leader as an advocate for the teachers. I mean, always an advocate for the teachers and for our needs and concerns. . . . They're carrying what we say to admin [sic] and admin [sic], they're carrying back to us . . . It's a voice between the two factions, I guess. (personal communication, January 26, 2016)

Kevin: They are our representatives. They are our liaisons . . . they are just—have volunteered to represent us. I think just the teacher leader, not having the authority, but the understanding from the administration that, “Look, this is the entire department’s consensus view.” I think just having that, as a teacher leader, coming from one person but understanding that it is the consensus of the department, I think is more powerful. (personal communication, January 26, 2016)

Teachers added they thought this part of the TL job requires TLs to be “very good at listening to our concerns and understanding them” (Kevin, personal communication, January 26, 2016). In addition, teachers said TLs must be “givers” with an “ability to speak up” (Lori, personal communication, January 26, 2016) who are “willing to spend a lot of their life doing this” (Linda, personal communication, January 26, 2016).
Senior High Assistant Principal Matheson’s comment below extends these descriptions of TLs as Advocates and illustrates another pattern in the data—references to TLs’ content area expertise as enabling the capacity for advocacy:

So I think a teacher leader is absolutely essential to get hands on, to get into their department, and to advocate for their department. . . . I think as an administrator, I’m going to advocate for my teachers as much as I can in a general sense, but I don’t have the knowledge to advocate for budgetary items, specific things that are in need, scheduling processes. I think that’s a big piece. That you are constantly having feelers out with department members—what do they need to be successful? We want our teacher leaders to fight. Obviously, you [TL] can’t promise things because there’s a step that has to go through, but you [TL] have to listen and you have to present that, and in most cases, I’ve found people [administrators], we’re receptive of it. (personal communication, December 1, 2015)

TLs spoke of using or leveraging their expertise or knowledge of their content area as a way in which they would seek approval or “argue” for their or their department’s positions. These comments suggest that the advocacy role of TLs is limited by a lack of positional authority vis-à-vis administration (e.g., “not having the authority; “you can’t promise things”). As Principal Keller noted, administrative decisions can often supersede those of the TL, but the position does provide “that forum or platform for TLs to be heard.” In his words, while “we [administration] listen,” budgetary decisions, teacher scheduling, and all changes to courses ultimately must be approved by administration (personal communication, January 7, 2016).

When examining these and other responses from the data collected in MVHS, I saw a pattern in the way participants described TLs’ advocacy for their departments and TLs’ lack of positional authority—the use of combative or oppositional language. In responses already quoted as part of this section, examples include: “we want our teacher leaders to fight,” and a “voice between the two factions.” This adversarial language was used consistently across participant roles. In fact, the word “fight” was used multiple times by both TLs and administrators to describe the function of TLs as Advocates. Other indicators of this theme described TLs as, “taking the battle on,” and “standing up for” teachers. Furthermore, in each circumstance, the “fight” defensively positioned administration. These data suggest that a TLs’ lack of positional authority influences the way in which others view how TLs enact or practice advocacy for their department.
In summary, the descriptions of TLs and their leadership in this context suggest that TLs serve a number of informal functions or roles. Depending on which role partners they are acting on behalf of, TLs are described as Implementers or Initiators. As Implementers, TLs facilitate teacher compliance with administrative initiatives. As Initiators, TLs may independently introduce change or do so on behalf of their department faculty as Advocates. When describing this advocacy all participants included language of opposition most often directed toward administration. The next section details yet another role of TLs in this setting, where advocacy takes on a different meaning.

**TL as Middle Man.** TL participants often used the term “middle man” to identify themselves as leaders. In this role, TLs were described as bi-directional “advocates” and “liaisons,” as well as “bridges” and “facilitators” between teachers and administrators.

For example, Assistant Principal Matheson reported that “a [TL] must be an advocate for their department and [emphasis added] for the school and district.” He elaborated further, saying the TL must “balance that advocacy” and “address needs on both sides.” He cited this “balancing act” as a reason why the position of TL, when open in his building, is sometimes difficult to fill. He said some teachers aren’t willing to “walk that line between their departments and the administration.” During the interview he explained it in this way:

A teacher leader is—I want to say advocate, but I want to be cautious when I say that. You can advocate for your department, but you have to advocate for your school and for your administration. Just as we are a nexus—building principals sometimes are seen as a nexus between central administration and teachers—a teacher leader is that nexus between the teacher and the administrator. In all senses of the word. Things can get heated, and we can have discussions, and we can agree to disagree, but we also have to foster that relationship. And that teacher leader has to be able to do that. When I say advocate, absolutely, hold onto your principles, and fight for your department and fight for what you believe, understanding the parameters that a principal has to work through, the parameters of central administration. And, how can we get things done on both sides, mutually. I’ve seen firsthand, personally, teacher leaders who can’t bridge that, who have a mask up and are simply one-sided in that sense, causes a lot of harm. (personal communication, December 1, 2015).

Matheson used the words “nexus” and “bridge,” suggesting TLs serve as intermediaries in this context. Principal Keller deemed this position a “controversial setting” where TLs may need to be
“combative with an administrator” and “get bashed from their peers” (personal communication, January 7, 2016). Matheson used the verb “balance” to describe what TLs must do in serving this function, but TLs described engaging in additional processes as part of fulfilling this third role.

Examples of this Middle Man role are described throughout individual interviews in connection with both managerial and instructional responsibilities. For example, Elizabeth described navigating department budgetary needs and administrative financial responsibilities. She works with her fellow department members to collect requests and then, “[totals] it up and [gives] it to the Principals. . . . Then, we negotiate back and forth if it's not agreeable to what the District feels is reasonable . . . [until] we reach an agreement.” Elizabeth elaborated, saying:

“Even though I'm the leader, I don't think that I'm the final voice in anything. It really is a matter of what they [her department] want” and “what administration wants.” She further explained, adding:

“I mean, I can give them my advice, but it really is a forum. I kind of feel like maybe the mediator” (personal communication, November 11, 2015).

Jarred described this give-and take as “trying to feed two masters,” saying “that’s led to some issues where some of my bridging happens.” He expounded, describing himself as a TL in this way:

You are a bridge between your department and the administration. . . . So I try to do as many things as I can independent of them because that's part of my role, is to help them. So if I'm going to make a decision about something, I'm going to go to them and say, “This is what we're [the department] planning, what do you think?” Cause I don't want to surprise you when we get to a bigger meeting with what I'm about to say. So it's trying to have that professional relationship to work toward building something as opposed to trying to get at someone. . . . And, ok, administrators tell us what they want, but if I know my department doesn't want to do it, and I know that it is not going to beneficial because it's just some dictate from on high, how do I give the administrator what they want while also giving my department the minimum amount of inconvenience? (personal communication, November 12, 2015)

Jarred reported he believes “getting to know everyone in [his] department” is “a pro” of the TL position and described how building relationships helps him to advocate or fulfill both teacher and administrator needs:

Because I've built that rapport, I can say [to administration], “Hey, we have a concern about this issue that you brought up. How can we, how can we get what you [administration] want without causing a problem for our department, or for teacher X or Y
or Z?" (personal communication, November 12, 2015)

The data supplying these sample responses suggest that TLs in this setting serve as communications “bridges” from teachers to administrators and vice versa. TLs, as Middle Men are dual “advocates” for teacher and administrator needs, arbitrators between what can be competing interests. The next section outlines benefits challenges reported by participants that have implications for how TLs experience this position.

Benefits. Participants described several benefits of the TL position, including: professionalism or professional fulfillment, influence, and advocacy. Another reported benefit was that the position is as one of teacher—rather than administrative—leader, a benefit that lends insight into how TLs in this setting navigate their dual roles. The subsequent sections present data in connection with these advantages.

Professionalism and professional fulfillment. One administrative role partner participant implied that TLs having a “voice” or, as illustrated in an earlier section, serving as Initiators or Advocates is beneficial for individuals who take on this position. In his words:

I think there’s a tremendous benefit for the teacher in being able to lead, perhaps that teacher doesn’t want to, I hear teachers say often that they don’t want to be an administrator, but I think they have a whole lot to offer too in guiding folks and guiding the department. I find that a lot of people find it to be very fulfilling professionally—to be a teacher leader and to know that they are having a positive impact and a voice in change and revisions in their curriculum. . . . And if they feel trusted and respected by the administration, which I hope that’s the atmosphere that we create, I think it becomes very fulfilling for them professionally. (Keller, personal communication, January 7, 2016)

Elizabeth, a TL in this administrator’s building, reported that “professional respect out of the district, and [going] to professional development” are benefits of the TLs position. Her TL colleague, Jarred likewise mentioned opportunities for professional development as a “perk” of being a TL, saying:

As much as we [bemoan] going to that training that we have to go to, it does sometimes open the door to more professional development that we get because we are the teacher leaders. It'd be nice if we could direct more of it, but we do get exposed to a lot more which can help build network connections in that professional learning community. So that’s a benefit that we have. (personal communication, December 21, 2015)

Other participants mentioned a different kind of increased professional learning as a benefit, that
which occurs internally in connection with the District or the department. For example, in the
group interview Lori, a teacher in Stacey’s department, said that as a TL “you certainly know
what’s going on in your area, in your department. I mean you know everyone’s concern, you
know what’s going on” (personal communication, January 26, 2016). Stacey herself reported
what she saw as another benefit: “As much as we complain that we’re just the disseminators of
the information instead of being part of the development of it, at least we get a little bit of the
inside track on what’s going on in the District” (personal communication, December 21, 2015).
Elizabeth corroborated this sentiment adding, “a little bit. So we can prepare and figure out how to
filter to our department. Like, ‘Okay, how am I going to going to tell them this one?’” (personal
communication, December 21, 2015). But Elizabeth also extends the idea of “professional”
benefits of the position of TL.

Beyond professional fulfillment or development and learning, Elizabeth mentioned how
she felt a benefit of the position was gaining self-management or “professionalism”:

I think also . . . being treated as a professional. People want to be treated as
professionals, and so I think teacher leadership gives us [teachers] a chance to do that in
a way, in a framework, allows us to manage ourselves so that we can exercise some of
that professionalism and not always be told what to do, we can make some decisions on
our own. (Elizabeth, personal communication, November 11, 2015)

**Influence.** In addition to professionalism, TLs referred to another benefit in language
that suggested the position afforded TLs influence, what Jarred referred to in the group interview
as “political collateral.” In individual, as well as the group interview, all three referred to this
benefit as “weight.” Jarred reported:

I can add that title when I feel I need to carry a little more weight than just teacher . . . if
I'm applying for a grant, if I'm sending an email a parent might not like, or if I'm
referencing a program we’d like to get. (personal communication, December 21, 2015)

Stacey similarly said that she put her title on student recommendations “to have it carry a little bit
more weight with the kid” (personal communication, December, 21, 2015).

The term “weight” implies that the title may help these TLs wield a certain influence or
acquire resources. But there were also instances in the data where this “weight” meant more
flexibility or forgiveness. During the group interview, TLs described this benefit of the TL position

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in this way:

Stacey: I think when we [TLs] do screw up, we do have a little bit of leeway. It's a little bit of give and take.

Elizabeth: Like the political thing [referring to Jarred’s use of the term “political collateral”], like, “Okay, you do a lot. You're entitled to a screw up once in a while; it is what it is.” . . . Whereas if I was someone who probably didn't do much, they may [be] a little bit angrier. It's like—

Jason: In coaching, you took an aggressive penalty, meaning it was because you were trying but you just over-exerted a little. Coaches would always rather see that than the passive, “I'm sitting back” penalties. I think it’s the same thing with teacher leader. . . . I think some of your best people, you lose creativity when you must be within tight confines of a structure, and I think with a lot of your good teacher leaders you have a more creativity. (personal communication, December 21, 2015)

**Advocacy.** Related to the “leeway” provided by the “weight” of the position, administrators, teachers, and TLs reported a benefit of the TL position was the ability to “advocate” for other teachers. While data presented earlier suggests TLs serve as Advocates in their positions, participants spoke of a benefit of the position as allowing for such advocacy; the position provides a “platform” or “forum” for advocacy (Jarred, personal communication, November 12, 2015; Elizabeth, personal communication, November 11, 2015).

For example, when asked to relay a benefit of having TLs in his building, Assistant Principal Jackson said, “I think you always have that one person fighting for what that department needs—that advocate that’s always sticking up for you, um, and your needs” (personal communication, January 7, 2016). In the group interview, teacher role partners similarly described the benefit of having a TL position in their departments. For example, Kevin relayed:

I think anyone who accepts the position is doing it for the greater good so that we can have that organization within a department—so that we can have somebody who’s going to speak up and be our collaborative voice. I don’t see it as a personal benefit. I see it as something that somebody’s going to do so that we [the department] can all have this position. (personal communication, January 26, 2016)

When asked about the benefits of the position in the group interview, TLs also mentioned advocacy, as illustrated by the following excerpt:

Lisa: And we do get to voice our opinion, I mean.

Jason: Whether it's listened to or not.
Lisa: But, we do have the platform for letting people know what we think, and sometimes they listen and sometimes they don't.

Jason: The key is putting the idea there that something might grow into what actually does happen, so [Teacher Leader] gives you that vehicle for that. (personal communication, December 21, 2015)

This “platform” or “vehicle” was important for TLs and administrators in that it helped them to be able to “benefit the students.” As Assistant Principal Matheson suggested: “the last and most important benefit is students. I think we have a heck of a connection—district, building, and teacher leader. . . . And, I think that we get all hands on deck” (personal communication, December 1, 2015). Jarred made the connection between TLs and benefit to students more explicit when he reported: “The teachers are the ones to educate the kids. It’s not an administrator. So by keeping the teachers happy, [TL] typically makes the education process run smoother. . . . And that benefits society because our kids learn more” (personal communication, November 12, 2015).

**Teacher, not administrative, leader.** All participants mentioned that a having a leader who is still in the classroom on a daily basis is a benefit. For administrators these mentions were related more to TLs having “knowledge of best practices” (Matheson, personal communication, December 1, 2015) and “content area expertise” (Keller, personal communication, January 7, 2016). Teachers, on the other hand, referenced the value of TLs’ knowledge of current classroom or department issues and changes affecting teachers’ work. Notably, this exchange from the teacher group interview illustrates why these participants felt a TLs’ position as a *teacher* leader is valuable:

Kevin: Well, the teacher leader who is still a teacher knows what it’s like to be a teacher so they don’t forget how it is to be in the classroom day in day out. They can commiserate with some of your struggles that you have, and I think just understand the organization of the department and what skills the students need to come in with in order to be successful in the different classes. I think that [TLs] have more knowledge of that; they are still in the class on a regular basis. I think it just helps [TLs] to guide us better and to represent us better when we are bringing up these issues of students’ preparedness and such.

Lori: I always felt that a principal should also be a classroom teacher. I know that most of them have been, but I don’t think you get the full sense of what is going on in your building unless you’re a classroom teacher. I think that element of the *teacher* [emphasis
preserved] leader is important. I think they should be a classroom teacher.

Linda: Well, it's the difference between theory and practice, too. In theory, I can convince anybody that any idea sounds good, but when you have to think about—"How am I going to put this into practice?"—someone who's been out of the classroom for several years probably doesn't know. . . . Whereas a teacher leader who's currently teaching can actually see how it would shape out with the current population of students. . . . I think one of the frustrations that teachers have when things come down from above is that when you're not doing it, you can't really critique it and give feedback and adapt and mold and change it. When administration comes out with these new initiatives that they don't have to do it, it makes it seem like an impossible task for us. Whereas when it's somebody who's in the trenches with us doing it, then together, we're collectively making adaptations. (personal communication, January 26, 2016)

For the TLs, their classrooms or teaching were described as sources of what they share with their colleagues. For example, Elizabeth explained, "I think that if I do it in my classroom, and it works that's where I kind of get my guidance for what I share with my department" (personal communication, November 11, 2015). While the TLs agreed that concurrently serving as teacher and as TL was beneficial to their leadership, they also shared that this positioning was a challenge.

Challenges. This section provides data that illustrate the difficulties associated with TLs' positioning between teacher and administrators. Other challenges are highlighted, including: TLs' positioning as leader in this context and TL's navigation of both leadership and teaching responsibilities.

TLs in the middle. TLs reported struggling with wanting to be seen as a colleague or "one of them [teachers]" while filling responsibilities that may compromise other teachers' perceptions of them as "fellow teachers." The following excerpt from the group interview is an example of how TLs spoke of being "in the middle." Stacey begins this excerpt by describing a particular challenge she is facing with a colleague:

Stacey: Through some data of my own, I'm noticing some trends in some of the ways the courses in the department are taught. And, I'm pretty sure I know what would be a fix to it, in terms of the teachers that are teaching these classes and their teaching practices. I can't go to those teachers as a teacher also and say, "You need to be doing this and look at what's happening to the data because it's significant and it's not a good trend." What I did do is, I put the data together, and I did sit down with [the Principal] last week for pretty much an entire period, and I tried to let him know it needs fixed [sic] but I can't—
Elizabeth: Can't do that. [emphasis preserved]

Stacey: I can't just go to this teacher and say, "You're not teaching this course next year."

Jarred: That's a battle you may have to face. I think the whole idea of [teachers] looking at you differently, there are times that they have to look at us differently because we have the responsibilities. But going back to, "How do we get them to buy in"? They have to think of us as one of them. When they don't think of us as one of them, it's harder for them to buy in to what we're asking.

Elizabeth: When they do think of us as one of them then it's really hard to—

Jarred: Implement the change that you're talking about.

Elizabeth: I think that's part of it, I think those of us who applied to be teacher leaders felt that we had something to offer, and I don't think that makes us better.

Jarred: But at that point, there needs to be an administrative—

Elizabeth: And they [administration] know about it.

Jarred: And that's the thing. Administration doesn't make the change. Ultimately, we are colleagues. Which is why we want to be thought of as one of them, because we don't have the power to say, "You're not doing that." (personal communication, December 21, 2015)

In this exchange, the TLs suggest that being "one of the [teachers]" helps them to implement or initiate change; however, such positioning also compromises their ability to make particular kinds of changes, in this case improvements in another teacher's instruction.

A lack of positional authority is also mentioned in this exchange: "we don't have the power to say, 'You're not doing that.'" In particular, the TLs suggest in this excerpt (as well as others during the individual interviews) that this lack of "power" limits the kinds of actions they can take when addressing concerns with colleagues, especially those that may challenge union guidelines. For example, Jarred and Elizabeth both mention their union affiliation as aligning them as "equals" to teachers. In doing so, union membership then shapes how TLs handle situations such as Stacey described with her colleague's course instruction. Jarred reported, "because we work in a union, there is sometimes conflict" (personal communication, November 12, 2015). Presenting a hypothetical situation, Elizabeth described how "even though [she's] a teacher leader, she's still an equal member to [teachers] as far as being a union member. So [she] can't tell them to do anything." Instead, Elizabeth explained: "I can suggest things, I can lead
[teachers] through things, but if there was ever something I really felt needed to be done, I couldn't make them [the teachers] myself” (personal communication, November 11, 2015).

Stacey, on the other hand, did not reference her union membership. She used more general terms (“co-worker,” “fellow teacher”) to describe her positioning in reference to teachers, and as the excerpt from the group interview showed, Stacey, to borrow Elizabeth’s phrase, didn’t make the teacher change herself. She circumvented her lack of positional authority by bringing the administrative attention to the instructional issue she discovered.

At the same time alignment with teachers was reported as challenging, TLs and administrators remarked that alignment of TLs with administrators was difficult. For example, Jarred described sometimes being seen as an “agent of the District” influencing some of his colleagues to become “resistors” (personal communication, December 21, 2015). One administrator mentioned a “stigma” that comes with taking on the TL position as a challenge: “I think certain people look at it that if you’re a teacher leader you’re in with the administration, and I feel like some people don’t want that stigma that they’re tight with administration” (Jackson, personal communication, January 7, 2016). His colleague, Principal Keller elaborated further, suggesting that a TL “is taking on a different role” which complicates teacher-to-teacher union relationships. In his words:

Some [teachers] would look at that as, “You’re telling me what to do. We’re part of an association together” . . . And, I think some people have a difficult time with and would consider those to be blurred lines . . . [because] we talk about scheduling . . . as teacher leader we sit down, we talk about staffing, we take your recommendations. That makes people very uncomfortable. There’s certainly some influence that teacher leaders have over several things that impact teachers. (personal communication, January 7, 2016)

These responses indicate that while TLs are teachers, they also have responsibilities that separate them in some ways from their teacher colleagues and fellow union members. Participants described this dual positioning as challenging for TLs because it influences how TLs respond to teachers and how teachers respond to TLs. But, TLs reported an additional challenge associated with being both teacher and leader: balancing their classroom and leadership responsibilities.
**TLs as teachers and leaders.** Each TL was asked during individual interviews to describe their experiences being both teacher and leader. Their responses suggest a pattern of struggle and lack of balance. For example, when I asked Stacey what it was like to fill both classroom and leadership responsibilities, she replied: “I'm failing miserably” (personal communication, November 13, 2015). I asked her to elaborate. She turned around and motioned toward her desk with her hand. I saw stacks of books and papers piled high on both ends. Stacey continued, referencing an additional preparation she has been teaching for several years due to a course sequence change that was implemented under the previous TL:

I'm about ready to cry. It is too much. I keep thinking—I keep telling myself, “I just got to get through this year because I will lose [the extra course] I’ve been teaching. That's going to make my teaching, my preparation a lot easier. If I can just get through this. Then I keep thinking, “What am I going to teach next year?” In my dream world, I would love it to be that I'm more—I don't think they'll let me, but if I could have some time during the day to be more of a coach, administrative role, and to maybe go into the classrooms more than what I do . . . but I don't think that'll happen. (personal communication, November 13, 2015)

Jarred referenced having to balance resources and described a classroom interruption similar to two others I saw with TLs during site visits: He said:

I can look at it two ways. I can say it can hinder because if I have to devote resources to being the teacher leader, I am not devoting them to my classroom. So that's a negative because a prime example is I had my kids working on something and a teacher came. We have no common planning time so she saw that I was at the front. The kids were working on something. She came in. We had a discussion because we had to figure something out, she had to meet with an administrator and just needed to get it done. So I had to take away from the kids to do that. . . . So that's, I think, a drawback that I see. (personal communication, November 12, 2015)

Another example of interruptions such as the one Jarred described, I saw in Stacey's classroom. Directly after finishing a morning seminar meeting with her faculty members, Stacey spoke with an administrator seeking her feedback on a letter to be sent out about a program Stacey coordinates within her content area department. Having begun the few minutes during the class change, the conversation continued through the beginning of another class. Consequently, Stacey needed to take a few minutes at the beginning of the class period to prepare her materials before beginning her interactions with students.

To summarize, participants reported challenges associated with the TL position in this
setting, including tensions between their associations as fellow faculty and union members, and their alignment with administration by nature of the formal post. Other challenges included balancing classroom and leadership responsibilities.

**Influences to serve and remain.** This final section presents TLs’ responses to questions about what influenced them to serve in leadership and what may influence them to remain in their leadership positions. The section begins with an overview of the types of leadership positions the TL participants have held and for how long these TLs have served in leadership. The subsections that follow detail patterns of influence suggested in the data, including: (a) influential individuals, (b) confidence in teaching, (c) a call to service, and (d) an ability to make change. Then, other factors influencing TLs decisions to remain in leadership are also presented, including financial compensation and maintaining influence.

All mid- to late career teachers, The TLs participants from this setting all held other school-based leadership posts prior to taking on their current positions in the District. These leadership positions included: extracurricular activity sponsor or advisor, union building representative or officer, and department head (prior to the position’s transition to TL). Table 3 indicates the number and type of leadership positions and the years within their teaching career when each TL participants acquired his or her first leadership position.

Table 3

*Teaching and leadership experience of Mountain Valley Junior Senior High School Teacher Leaders*

<table>
<thead>
<tr>
<th>Years of teaching experience</th>
<th>Years teaching prior to current leadership position</th>
<th>Years in current leadership position</th>
<th>Years teaching prior to leadership</th>
<th>Type of prior leadership positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stacey*--18</td>
<td>(7) 15</td>
<td>4**</td>
<td>2</td>
<td>Club/Activity Sponsor Department Head</td>
</tr>
<tr>
<td>Jarred--17</td>
<td>(6) 12</td>
<td>6**</td>
<td>3</td>
<td>Program director Union Officer Department Head</td>
</tr>
<tr>
<td>Elizabeth--19</td>
<td>16</td>
<td>3</td>
<td>5</td>
<td>Union Representative Club/Activity Sponsor</td>
</tr>
</tbody>
</table>

*Note: * denotes career change; (#) denotes number of years in current leadership position before title changes; ** denotes service as Department Head prior to position’s change to Teacher Leader.*
**Influential individuals.** Each TL identified influential individuals who affected the TL’s decision to either become a teacher, or later to take on leadership positions. These individuals included the following: (a) family members or teachers who encouraged the TL participant to pursue teaching; (b) school leaders who sought out the then teacher for the TL position or other leadership positions; or (c) cooperating teachers, mentors, or administrators who provided examples of effective teaching and leadership. Often in the TLs’ narratives, they mentioned a critical incident involving one or more of these individuals confiding in the now TL that he or she was capable of and should seek leadership opportunities. Sometimes, the TLs reported that such a critical incident involved the influential individual given the now TL opportunities to lead informally at first.

For example, Stacey credited two principals, several teachers, and a superintendent with showing her what effective and ineffective teaching and leadership look like. For example, she recounted a time when an assistant principal came in to observe her on a particularly bad day as a young, struggling teacher:

> In my [observation] debriefing, the first thing out her of mouth is, “You are working too hard for all the little that you’re accomplishing.” I started crying. I took away from that is—I vowed I would never ever, if I were in a position like that, never do that to another teacher. It was just horrendous. (personal communication, November 13, 2015)

While this building administrator provided her with a negative example, she remembered another principal in this setting as a more positive example, saying: “Now the principal there I loved. He was very supportive.” She recounted how this principal provide her with an opportunity to see another teacher set up his classroom routines for more effective management at the beginning of a new semester after Stacey had struggled in the first half of the year. From that support, she said: “I learned good experience, classroom instruction, and management. A lesson in—yeah, how to handle other teachers” (personal communication, November 13, 2015).

Later, a superintendent “would go to bat for [her]” during a student disciplinary incident on a field trip, and “get run over like a Mack truck” by parents on her behalf. She said this administrator’s and another teacher’s support during the incident helped her “to learn about administrative
support. I also learned teacher support” (personal communication, November 13, 2015).

Elizabeth similarly identified influential teachers and school leaders. However, Elizabeth’s influential school leaders either gave her opportunities to take the lead early in her career or explicitly told her they felt she had leadership potential. In her first teaching position, Elizabeth recalled how her principal put her in charge of creating a brand new curriculum and then training other teachers in its use. Later in her current setting, she remembered another principal validating that "she would . . . lead.” She recounted:

My former administrator at the junior high . . . he looked at me and he said, “There are people that plan and there are people that pay—and you are a planner.” That idea like I’m the one that plans things, I’m the one that takes charge and people see that in me and so that’s just my identity and he’s right . . . . He was the one that told me when I was hired, “Hey, you’re going to be a leader. You’re going to be taking the lead in this department.” And, I think that just knowing that other people saw that in me as well was just the—I guess I am that person. (personal communication, November 11, 2015)

Jarred would similarly mention school leaders who pointed out his leadership potential and provided him opportunities to take on leadership in the school or department. Jarred had been involved in multiple volunteer organizations prior to becoming and during his first years as a teacher. He narrated what he called an influential exchange with his superintendent during his early career in the District.

I asked him, “Why did you pick me? You had a lot of good candidates. Why did you pick me?” And he flat out said, “Your education, where you went to college was a liability. I don’t think their program’s very good. But you came in that interview, and everything you’d done showed that you just won’t be a teacher in this classroom. You’re going to be a person who goes above and beyond. And, we could have hired people who are just going to be teacher. But we need people—for this district to thrive, we need people who are going to go above and beyond.” So now I have a message from the superintendent saying, it’s what you did back here that got you this job. So he’s just reaffirmed in what I already believed. It wasn’t that I did this to get the job. It’s what I believed in. So now you’ve got the superintendent telling you that. (personal communication, November 12, 2015)

Jarred described how three years into his teaching career in the District, he called this same superintendent during school building renovations. Jarred had investigated a new lighting system and wanted to place a request for the planetarium. But when it came time for the superintendent to present Jarred’s request to the School Board, he gave Jarred the opportunity to do so. Jarred would cite his successful interaction with the Board as influential, saying that because of his “win”
with the presentation: “I knew I can make it happen” (personal communication, November 12, 2015).

Two TLs also credited school leaders as the reason they are currently serving in the position of TL. Both Stacey and Jarred were approached by building principals when positions of DH and TL opened in the senior high. They were asked directly if they would fill these positions. In Stacey’s case, both times she served as TL (the first time during its transition from DH), she was sought out by her principal. Jarred described how his assistant superintendent for some time simply “put my [name] in” on the Teacher Leader Intent/Application Form.

**Confidence in teaching.** None of the TLs reported educational training, professional development, or teacher preparation experiences as influential in their decisions to seek out leadership positions. But, two of the three TLs similarly point to times in their career trajectories when they felt they could “do more” or “could offer more” because they had gotten to a particular level of confidence in the classroom. To quote Elizabeth:

> I think it’s mainly I know what I’m talking about, which sounds really arrogant but I feel like I know what I’m talking about. “I felt like I was qualified. I felt like, as arrogant as it sounds, I felt like I knew what was happening with a lot of the [state standard] changes that were going to be made. (personal communication, November 11, 2015)

Stacey referenced feeling as though “[she] could have more impact” because her “hands are tied.” As she stated it: “You can only do so much in the classroom.” In her mind, she was “getting good results in the classroom,” and she thought about TL as an opportunity to “make a difference, maybe” (personal communication, November 13, 2105). Similar to Elizabeth, however, she refers to these thoughts as “a little bit of conceit” or “ego.” On the other hand, Jarred reported his abilities in the classroom were not an influence on his deciding to become DH or TL. As he reported: “I don’t really think that being comfortable in my teaching really influenced—it didn’t influence me, but it probably influenced [administration] wanting me to do it” (personal communication, November 12, 2015).

Additionally, all three TLs mention in some form coming to a time in their teaching careers when they felt they “had more to offer” or felt “ready to take on additional responsibilities.”
In the group interview, the TLs attributed this to wanting or needing a “challenge” (personal communication, December 21, 2015). An administrator expressed a similar sentiment when asked about the benefits of the TL position, saying:

I find it to be a challenge for folks, and some people welcome that challenge, especially when they’re in their career perhaps seven, eight, nine years in their career. They’re ready for that challenge. They feel that they have a strong understanding of the content, they have a strong understanding of the instructional best practices that need to be delivered, and they have a calling to want to communicate that. (Keller, personal communication, January 7, 2016)

Call to service. The “calling” Keller described is connected to content area or pedagogical knowledge. The TLs mentioned a different, broader calling as an influence on their decisions to lead beyond the classroom. Elizabeth said that part of the reason she wanted to become a TL is that she “[likes] to help people.” To quote:

I don't mind doing a little bit extra to help people. I think that I have the qualifications for it. I think that I have the interest for it. I like to take care of people, too. I mean, if you go in to the psychology of the five love languages, I am definitely acts of service. And so, I think that that's how I show my love for people by doing things for them. And so, I think that that's part of it. (personal communication, November 11, 2015)

Jarred referenced education more specifically in a similar response regarding influences on why he wanted to take on a leadership position:

Because I'm helping . . . and I think it will make education better. . . . Because I want to be involved, and I want to see education get better. I want to see things happen for the good of everyone. (personal communication, November 12, 2015)

In a comment cited earlier, Stacey also referenced wanting to “have more impact.” In her words:

I saw what students were capable of, if they were encouraged and they had the right setting. . . . I think what I would put first [as a reason] is that somewhere deep in here [referencing her heart] I do have a desire to make a difference. (personal communication, November 13, 2015)

Moving on. All of the TLs mentioned wanting to remain in their current positions, at least for now. Elizabeth, however, mentioned that she would eventually seek a leadership or other position outside the classroom. She reported:

Getting a PhD, I think that it's just made me realize that I am ready to move on to other things in a way. . . . I definitely don't want to be an administrator. . . . I would love to be a curriculum director, somebody who's helping plan professional development opportunities
for the teachers. Teaching at the college level is something I am interested in as well. (personal communication, November 11, 2015)

Stacey also is looking toward leaving the classroom in the near future, but for a different reason—retirement; although, she is not ready to go “just yet.” Stacey said she will consider leaving if her course load does not change. She reported struggling to balance the demands of five different course preparations that she has taken on as the result of course sequence changes. Jarred expressed his desire to split the position with another teacher to both “lighten [his] own load of responsibilities” and address areas where he does not feel he has the skills and background to lead the department. In particular, he cited a lack of “passion for” and “knowledge of” the new state testing requirements in his department that a colleague of his “knows better” and is “more excited about.” In his words: “I think it is great to be able to give leadership of that to someone who is passionate about it” (personal communication, November 12, 2015).

**Ability to make change.** In the meantime, Stacey, in particular, mentioned that her decision to stay in the TL position until retirement also will depend on whether she can continue to make change. She had resigned the position several years ago after “publically” experiencing administrative resistance to changes she had believed she had support for implementing in her department’s course offerings. She recounted: “I just got shot down. That’s actually when I resigned. What I wanted to do, what I felt was better for the department and better for the students—it made more sense logically to do it for the kids” (personal communication, November 13, 2015). When she stepped back into the TL position, she thought “maybe it would be different. I would just feel like I had more support and more camaraderie—like [department members] could [work] together” (personal communication, November 13, 2015). But Stacey said that the level of collaboration she should like to see in her department “hasn’t happened, yet. It's still we just do things because we have to do it, you know, going through the motions.” And whether or not she continues in the position of TL may depend on whether or not she is able to facilitate that “working together” (personal communication, November 13, 2015). This was not a unique response. The other TLs referenced being ready to “walk away” should circumstances change.
making them unable to advance desired changes.

**Not about the money, but it helps.** While none of the TLs mentioned the position’s nominal financial compensation as a reason to serve in the TL position, each of them referenced the compensation in some way as reason to remain in the TL position. Elizabeth said, “It was an opportunity to make a few extra bucks, to be honest” (personal communication, December 21, 2015). Stacey, thinking of retirement, added: “The more money I can be throwing at that paycheck these next few years, it's going to have more of an impact.” But she was quick to elaborate: “It's not like that much money” (personal communication, December 21, 2015). Jarred, during the group interview said of compensation: “It's not a significant amount of money, but it is more money. So it’s not the reason, but it helps [emphasis preserved]” (personal communication, December 21, 2015).

**Maintaining influence.** The final theme of influence to remain in leadership is connected to a benefit TLs reported comes with the position. In that they do not want to relinquish this benefit, it serves as an influence to continue as TL in the District. Earlier, I presented data that identified what TLs referred to as “weight” or a degree of influence that comes with the position. (e.g., using the title to persuade an audience, gaining flexibility when working within budget procedures, or garnering forgiveness when taking risks in the classroom). Jarred used that term again and employed an analogy to describe this incentive. He said:

> In teaching, you can’t, you don’t, your next step is a principal. Like, if you’re a salesman or sales rep [sic] you get a bigger territory. If you’re a lawyer, you get bigger cases. You’re in the police, you get promoted. In teaching, you don’t have that. So teacher leader allows me to do more than just be the classroom teacher. In a selfish way, it gives me more weight. I’m the Teacher Leader. So it allows me to do more. It gives me more chances to make my department better. . . . So it allows me to do that and get to know those teachers better and help work with them. So that, that—I don’t know. It makes me feel good. To be able to do more. (personal communication, November 12, 2015)

In this example, Jarred expressed feeling as though the position affords him opportunities to help his department in ways he might not be able to outside of the positions. But, Elizabeth and Stacey were quick to mention in the group interview that they felt “sharing lessons” and “experiences” that might help other teachers was “something [they’d] do anyway as teachers”
(personal communication, December 21, 2015). However, all three also reported part of this influence is being able to use the title and the position in personally beneficial or, what Jarred calls, "selfish" ways. I will provide only one further example from an individual interview that helps to illustrate the way in which this pattern emerged in the data as a reason to remain in the TL position.

So as Teacher Leader I have some autonomy. . . . I don't want to give up. . . . It's not so much give up the control. I don't care about the control. I care about the flexibility. It allows me to be more flexible in what I do. . . . I think that's the carrot. It gives me more freedom it's partly selfish. . . . Because I do work heavily within the budget. So that's the little part of Teacher Leader that I'm selfish with. (personal communication, December 21, 2015)

Conclusion. In summary, this section of the chapter presented data that highlight the ways in which TLs, teachers, and administrators at MVHS described TLs' responsibilities, their leadership, the benefits and challenges of the TL position, and what may influence TLs to serve and remain in position of leaderships. Themes and patterns in the data suggested that TLs in this context are organizational managers and instructional leaders who see themselves and are seen by others as Implementers of District mandates, visions and goals, as well as Initiators of changes, either independently or on behalf of their department members. In each of these roles they also become Advocates who “fight” for the needs of their department faculty members. TLs are described as Middle Men—intermediaries who must facilitate communications between teachers and administrators, negotiating a balance between the both department and District needs. Filling these responsibilities and roles, TLs experience challenges, such as difficulties prioritizing classroom and leadership responsibilities, as well as challenges navigating the relationships with colleagues while fulfilling responsibilities of the TL position. However, the TL position also comes with benefits, such as an ability to influence change. While the TLs currently serving in these positions do not plan on leaving the position right way, two of them spoke explicitly of moving on. For one TL that transition may mean retirement. For the other TL that transition may mean moving out of the classroom into a full-time leadership position. While the TLs were influenced to become TLs because of school leaders or increased confidence in the
classroom, the TLs’ decisions to remain in their current positions may be affected by their ability to maintain influence and make change in their departments or the building. While financial compensation is not the main impetus, the TLs in this setting reported that it is a factor in these decisions. The next section of this chapter will present data from Site B: Chestnut Hill High School and will follow a similar organization.

Site B: Chestnut Hill High School (CHHS)

First, I provide contextualizing information about the school setting and HTL positions in which participants currently serve. The remaining subsections detail themes and patterns in the data according to each of these same broad headings: HTL Responsibilities, HTL Roles, Benefits, Challenges, and Influences to Serve and Remain.

School context. Part of a large, urban public system in the northeastern United States, Chestnut Hill High School (a pseudonym), is one of fifty-three secondary schools in the District, and according to participants, one of the few that has not been converted to a public charter. A comprehensive neighborhood high school that serves students in grades 9-12 within its attendance zone, Chestnut Hill High School (CHHS) also offers citywide programs that require special admission. These programs include career and technical education (CTE) and magnet programs. According to information obtained from the State’s Department of Education website, current student enrollment is 3,151. This total student population is 30% African-American, 21% Asian, 23% Latina/Latino, and 18% White. The remaining 7% of the student population includes Pacific Islander, American Indian, and students of mixed race or other ethnic origin. Currently, as reported by the State’s Department of Education, the ELL (English Language Learner) student group at CHHS is 19%, and 51% of the students qualify for free and reduced meal programs. The State’s Department of Education website provided 2013-2014 student achievement data. Student performance was above state averages with proficiency rates at 46%, 32%, and 51% respectively on state tests in math, science, and literature. The school leadership team is comprised of two co-principals and six assistant principals. Within the building there are two student and teacher roster
officials who are non-teachers, and one teacher who serves in the position of Roster Chair. In addition to responsibilities in the Roster Office, this individual teaches one class per day. The school employs one-hundred and thirty four teachers. Besides Roster Chair, there are fourteen leadership positions held by teachers in the building.

**History of the HTL positions.** An independent education consulting agency, in a report prepared for the District, details how the SLCC role was part of a program funded by the United States Congress in 2000: The Small Learning Communities (SLC) Program. This part of the Elementary and Secondary Education Act was designed to help large high school schools create more personalized learning environments. As detailed in that report, CHHS was part of a cohort of schools within its District to receive SLC implementation grants in 2004. Akin to schools within a school (SWAS), each SLC at CHHS is tailored around particular academic programs or “academies” and range in size from approximately 400 to 850 students. Each SLC has its own mission statement and focus for academic study. Several SLCs require special admission or qualifications, including the following: Career and Technical Education (CTE), Magnet, and Academic Language Program (ALP) for ELL students. Other SLCs are chosen by students upon entering tenth grade and do not require special admission. These programs are connected to the following career pathways: arts and education, engineering, health and medicine, and sports marketing. Ninth grade students are also considered part of an SLC organized to meet the unique needs of students during their transition to high school. Instructors within the school are affiliated with a particular SLC, predominantly teaching students enrolled as part of that academic academy. All SLCs are multi-disciplinary, meaning that students fulfill all core academic course requirements such as math, science, English, and social studies, as well as specialized courses and programs associated with the focus of the SLC.

With the advent of SLCs, a new leadership position was created for teachers in CHHS: SLC Coordinators (SLCCs). Prior to the re-organization of the high school into SLCs, teachers could hold one of several formal leadership positions: Department Head of a particular curricular content area, Coordinator of a program associated with the ELL student population, or
Coordinator of a CTE program housed within the building. Previously, six Department Heads (DH) oversaw six core content areas, including math, science, social studies, and English. These positions remain.

SLCC positions were filled through an open application process. These positions as well as DH positions are now renewed annually and when a vacancy occurs due to retirement, termination, or departure. All staff may apply. Currently, there are eight SLCCs overseeing eight SLCs and six DHs serving five core content areas, including social studies, math, science, English, and fine arts. Teachers at CHHS are with students for six periods each day: five instructional periods and one advisory which takes place at the beginning of the day. While the DHs and SLCCs do not receive additional financial compensation, each are given two and three periods of roster compensation per day, respectively. Additionally, individuals serving in these positions are also released from advisory responsibilities. One DH and four SLCCs participated in this study; however, one SLCC, Shannon, was given full roster compensation during the course of the study violating the HTL participant sampling criteria. Therefore, for this HTL only data collected in the individual interview is included in this presentation.

SLCCs and DHs meet once monthly with building administration, and depending on factors related to scheduling and the school calendar, they meet weekly or bi-weekly with the faculty in their departments or SLCs during time scheduled into the teachers’ contracted work day.

The job descriptions. Updated in 2012, the SLCC and DH job descriptions list the associated duties, criteria for selection, and compensation of each position. These documents generally confirm SLCC and DH participant reports of their overall responsibilities; however, the data suggest that these duties are also constantly changing and shaped by contextual factors, including: the academic program associated with the SLC; building, District, or state initiatives or mandates; and the particular goals of the SLCC or DH.

The job descriptions for these HTL positions are included in two separate job opportunity postings publically available through the District’s website: The Coordinator for Small Learning
Community Initiative and Department Head. Each posting lists the same number, albeit a different set of fourteen “duties.” While not separated this way on the actual document, each list could be divided into two parts: (a) general responsibilities of leadership, and (b) specific tasks or activities that SLCCs or DHs must perform. Included as a duty in each job description is this statement: “perform other duties as deemed necessary and required by administration.” This statement implies HTLs’ responsibilities will shift or evolve beyond those included in the job description.

Mark, a DH, confirmed that the description is “an outline of what [the] duties are” but that “it’s not necessarily exclusive to those things listed” (personal communication, December 7, 2015). While SLCCs reported having a clear understanding of their role, they did express frustration regarding what they see as ever-changing duties and responsibilities.

For example, Shannon described learning “organically” what her responsibilities were as an SLCC. She now feels as though “just by the nature of [her] program [she] know[s] what [she has] to do . . . because [her] SLC is so specific.” But, in her words, the building principal is “always giving us more. . . . You know, that is the way this school runs. It’s just, constantly, ‘Oh by the way—.’” (personal communication, January 11, 2016). Another SLCC, Angela, reported: “I often feel like my role is ‘beck and call girl.’ On any given day I don’t think I could give you a list of what my responsibilities are” (personal communication, January 11, 2016). However, this same SLCC said that despite being unclear about her given duties, she does have a “list of consistent responsibilities that [she has] created for [herself]” (Angela, personal communication, January 11, 2016). These reports in combination with the job opportunity postings suggest that HTL positions are shaped by the individuals that serve in them, as well as by circumstances that may arise within the building, department, or SLC.

**Influential contextual factors.** The size of the SLC, make-up of the student population, program focus, and content area of the department or grade level of the SLC seem to influence these HTL positions. For example, two of the participating SLCCs must monitor and administrate student requisition of special licenses and diploma designations. Teacher role partners and one SLCC reported that discipline issues are more of a concern in larger SLCs than
smaller SLCs requiring special admission. The multi-disciplinary nature of the faculty under the purview of SLCCs also influences the types of profession development, planning, and facilitation that these HTLs must manage or conduct. For DHs who oversee departments responsible for administering state tests, student performance data and test administration or scheduling becomes a unique duty.

The HTLs, teacher and administrative role partners reported that the size of the school itself is a factor that makes the SLCC and DH positions necessary. In fact, all participants in some form or another described the “essential” nature of these positions in making the management of the building more effective. For example, Assistant Principal Jones reported:

In a place this size, it’s easy to feel disconnect. So our [administration’s] job was to shrink a very large place and make it feel like home. So we have eight small learning communities headed each by an SLC leader in the hopes that they will fill this need for students. (personal communication, November 23, 2015)

The size of the school was also important in how the HTLs in this building reported negotiating their dual roles and described what they do in their leadership positions.

**HTL responsibilities.** The job posting and participant reports suggest a set of central duties that SLCCs and DHs are responsible for on a regular basis. These duties can be divided into two categories: (a) those related to organizational concerns, and (b) those related to instruction or academic programming. The next section details these two categories of responsibilities for each of the HTL positions. Where appropriate, I describe notable differences and overlapping responsibilities within the SLCC and DH positions.

**Organizational responsibilities.** Individual interviews and the SLCC job description suggest that SLCCs are responsible for both organizational leadership and management. For example, duties listed on the job description generally refer to the SLCCs’ roles in creating or promoting the “academic climate” of the SLC. The following statements are among the first five bulleted items on the job posting found on the District’s website: “share in the vision, planning, and implementation of creating smaller constructs within the existing structure,” and “lead staff and students in the creation of a positive academic school climate.” To describe their main
functions, SLCC participants used phrases such as “building community” or “creating a sense of program identity” for the students and staff, and “setting goals for the SLC.” Words and phrases in these statements, such as “lead,” “create,” “share in the vision,” and “goals” suggest SLCCs’ responsibilities are connected to broader purposes than the completion of tasks or activities.

Documents these participants shared corroborated the ways in which the job description suggests SLCCs should go about “building” or “leading” their SLC communities. The job description mentions these specific tasks: “meet and greet students daily,” “visit classrooms daily to monitor the academic climate,” “implement a discipline program,” “advertise the success and achievement of students within the community,” “provide incentives and rewards,” and “involve students in school to career activities.” Email communications between two SLCCs and their teachers asked for the promotion of external opportunities for students to become involved in career exploration activities, advertised and encouraged participation in social activities for the students and staff of the SLC, and praised what SLCCs saw happening in classrooms while monitoring hallways during instructional time.

During shadowing, I observed these HTLs in the hallways at the day’s start. They were interacting with students and staff. Disciplinary exchanges over uniform violations or loitering between classes were also part of these interactions. In fact, overseeing student discipline was emphasized in four of the five SLCCs descriptions of their duties, while the remaining SLCC cited the strict academic achievement requirements for special admission to the SLC under his purview as a reason he is able to focus less on discipline (Justin, personal communication, November 3, 2015).

Overall, SLCCs I interviewed emphasized the importance of their “developing the community life” or “academic life” of the school and SLC (Justin, personal communication, November 3, 2015). In fact, two SLCCs implied that there is a dichotomy between what they and administration see as central to SLCCs’ responsibilities, as illustrated in the following example:

I think in terms of the school and the administration, they would see me as recruitment, the high school fair, the open houses, the, I review 2,000 applications. You know, I think for them that is what I do. For me, that is part of what I do, but the other part is, “How do
I develop this academic environment at Chestnut Hill, overall, that gives [students] the best options? . . . I guess it's administrative in my mind in the sense that it's structural of how the school—I don't know what I'm saying—I don't know if I can say it. How students approach [Chestnut Hill] and the opportunities that we have for them, and then what are the outcomes that come from those options and opportunities. I guess I see that slightly more administrative. (Justin, personal communication, November 3, 2015)

Beyond the responsibilities that suggested organizational "leadership," SLCC described being assigned other managerial duties or tasks. Examples on the job description include, "disseminating information," "monitoring teacher records" (e.g., roll books), and "meeting quarterly with administration." While these activities were mentioned by all of the SLCCs during interviews, these participants included others such as "communicating and engaging parents and families," "establishing and promoting" external partnerships with organizations that provide enrichment activities for students, "recruiting" and fundraising for their SLCs—none of which appear as part of their listed duties. In SLCs that require special admission, SLCCs also reported being responsible for managing the application and selection processes for their individual programs. In interviews with SLCCs, the most consistently reported organizational duties were monitoring the overall academic climate within their SLCs, overseeing student discipline, and promoting or recruiting for their individual programs.

Unlike SLCCs, DHs have fewer organizational responsibilities, and these are primarily managerial. Only four of the fourteen duties listed on the job description are unrelated or indirectly related to instruction, including: "oversee resources needed by the department and prepare related requisitions," "attend required meetings," "direct distribution and collection of textbooks and materials," and "identify and recruit students for outside academic opportunities." Mark, a DH in the building, confirmed these duties during an interview and added keeping grade archives for courses offered in the department as a responsibility of his (personal communication, December 7, 2015). He also reported that while SLCCs are charged more with providing general oversight and monitoring of the overall academic climate and student experience within the SLCs, the DHs’ responsibilities are much more connected to curriculum and instruction, professional development, and assessment. That is not to say that the SLCCs’ duties are disconnected from
Instruction. The next subsection details reports of instruction-related responsibilities in connection with both the DH and SLCC positions as they differ and overlap.

**Instructional responsibilities.** While the data presented in the previous subsection suggests that SLCCs focus on climate, student discipline, and program recruitment as organizational responsibilities, SLCCs and the DH both report being responsible for instruction related duties. SLCCs emphasized that they focus on finding ways to improve not just the SLCs’ community climates, but more importantly they focus on building and maintaining the academic climate in their SLCs. They reported doing that in the following ways: planning or facilitating professional development, finding and encouraging the use of particular instructional resources, creating “professional learning communities” among faculty assigned to their SLCs, and using data to find ways to improve the overall instructional program in the SLC. The job description only provides for one of these instruction-related responsibilities: “identifying and analyzing pertinent data to drive decisions in the SLC.” But, each of the SLCCs I interviewed emphasized wanting to “focus on instruction.”

The scope of the DH position is less related to program-wide, organizational and managerial matters and more directly related to instruction. The job description charges individuals who hold this position with “[providing] the necessary leadership to improve instruction.” While several organizational responsibilities listed on the SLCC job description implied they were organizational leaders, here the words “necessary leadership” suggest that DHs in this setting serve as instructional leaders. The job description lists particular tasks DHs may perform in fulfilling this leadership responsibility: “[providing] supports and resources to department members related to instruction . . . best practices, and testing;’” “[collecting] and reviewing weekly lesson plans for appropriateness and [providing] feedback;” “[assisting] in developing relevant professional development;” and “[collecting], [analyzing], and [interpreting] data to drive instruction.”
Overlapping, but different responsibilities. These DH’s instruction-related duties, as well as those mentioned by SLCCs align to Domains I-V of the TLMS (TLEC, 2012) and could be seen as similar. However, HTL participants in this setting claimed these responsibilities were actually quite different. For example, Justin, an SLCC, said his position is “not that curricular department chair type,” but both are about “instruction and curriculum.” He says his emphasis is more program-wide: “How do we as a program raise the rigor? . . . How do we function as a learning, as an academic learning community—students, rigor, cross grades?” He further elaborated, saying: “I do think, [SLCC] is a lot . . . at least in my mind, ideally it’s what administrators would be doing if you’re looking at a whole school. I’m just looking at it for my program” (personal communication, January 11, 2016). Thus, this “program” focus translates to thinking across academic disciplines about data, professional development, and best practices.

For example, as Karen explained, her program focuses on analysis of student performance data on a national exam connected to certifications in particular CTE fields (personal communication, November 4, 2015). Similarly, Justin reported focusing on his students’ scores on national tests, such as the Advanced Placement exams (personal communication, January 11, 2016). Recently, he facilitated his teachers’ adoption of materials for SAT preparation (personal communication, November 3, 2015). The SLCCs reported that they are more responsible for professional development or instructional support when it pertains to the overall goals of the SLC. For Karen, that translates to helping her teachers consider ways they can integrate “college and [emphasis preserved] career readiness skills” into the CTE and core curriculums (personal communication, November 4, 2015).

The DH reported that his purview of instruction-related responsibilities remains at the department level. In particular, he described his duties in this way:

The nature of the two leadership positions is quite different sometimes because they are running an entire program, every aspect of it. . . . Where [DHs] stick more or less with instruction and curricular concerns . . . I oversee people in my department, and I assist them with curricular concerns. . . . I visit classrooms when I get a chance to, just to see what’s going on. I can’t observe anyone obviously . . . I can give feedback, I can give assistance where needed. (Mark, personal communication, December 7, 2015)
In the group interview, an SLCC added: “[DHs] are responsible for covering usually along those State requirements” (Justin, personal communication, January 11, 2016). Mark confirmed this perception mentioning “mandates that come down from the District,” such as Student Learning Objectives (SLOs), common assessments, and state testing. He added that SLCCs do not really handle “any of that” (personal communication, January 11, 2016).

There are several responsibilities less directly related to instruction that both DHs and SLCCs reported handling, often in conversation or collaboration with one another. These duties include determining student and teacher placements. For example, in programs with multi-level courses (i.e., advanced, honors), the corresponding DH and SLCC reported working together to determine which students should be placed in which level. Because teachers are assigned to particular SLCs, DHs and SLCCs also described working together with administration to “make requests and talk about who will best fit” (Angela, personal communication, November 19, 2015) the students and courses being offered in the program. However, both the DH and the SLCCs mentioned that these teacher placements are “recommendations” they make. Angela compares this process to outfitting a fantasy baseball team, and then negotiating for the best players (personal communication, November 19, 2015). Administration and the Roster Office “often” make changes to teacher and student placement recommendations.

In the focus group interview, both SLCCs and the DHs reported addressing student needs and concerns about individual teachers as a responsibility of their positions. When I asked about this overlap, the HTL participants said that it depended on a “case by case basis.” Either one of the HTLs may be able to talk directly to the teacher, depending on who fielded the student concern. Or, HTLs may have to see an administrator. If a parent calls with a concern, however, the HTLs reported that administration has been directing these calls directly to SLCCs because “[they] know the kids” and the teachers (personal communication, January 11, 2016).

**Desire versus reality.** Even though participants in both positions reported instruction-related responsibilities, they also expressed a desire for instructional improvements to become more central to their duties. Recently, a teacher shortage in the building caused the loss of
regular common planning time, weekly sessions where DHs and faculty or SLCCs and their faculty would meet for professional development, reflection, and dialogue on issues concerning students. All of the HTLs I interviewed in this setting expressed frustration with the lack of time they now had to meet with their fellow faculty. Both the DH and the SLCCs felt it was hindering progress they had made in instructional efforts previously. For example, Shannon expressed her desire to be more of an “instructional leader” (personal communication, November 5, 2015).

She mentioned that many departments and SLCs were using protocols to look closely at student work during these common planning sessions. These sessions were also times when she would help teachers of students in her SLC develop classroom materials and instructional strategies to best meet the needs of the unique student population in this program. However, with the loss of common planning time and with additional changes that have happened in the building within the last few years, she feels that the focus on instruction “gets lost” in both HTL positions. She said:

> I think the instruction is the most important thing, and I see [DHs] as instructional leaders, but at the same time I am too. I feel like I'm—with everything that's going on . . . Year after year, it just feels like it's getting worse in terms of budget. So now, I'm the counselor, I'm the dean, I'm all of that. What I really envisioned . . . was having these little mini-walkthroughs where we're all in and out of each other's classrooms, but not with a checklist, and have these professional conversations. That's what I would see myself as, that kind of leader. Now, the kids see me as the disciplinarian, more of that, and the teachers see me as a leader because they see me having conversations with administrators, but it's not really what I would like. I'd like to be more about the instructional, that's really the most important thing. (personal communication, November 5, 2015)

Mark, similarly expressed feeling as though the focus on instruction is being “consumed” by other priorities:

> We have limited time to meet as departments. . . . So much [is] consumed doing other things with the SLOs and all of that stuff that we weren't really able to delve into that [professional development]. . . . Years ago that might have happened more. . . . There would be more talk about that, but now you pretty much have to stick with that requirement, yeah. It's true. I mean there's really no time to try to—to talk about [our content area]. (personal communication, January 11, 2015)

These example responses seem to illustrate a trend in the changing responsibilities of HTLs in the building: While instructional improvements are a desired focus for both positions, increased responsibilities due to recent contextual factors have diminished time and emphasis on
To summarize, documents and HTL reports suggest that SLCCs and the DH in this setting fulfill two types of responsibilities: organizational and instructional. While descriptions of SLCCs’ duties suggest organizational leadership as a focus, descriptions of the DH position suggest instructional leadership. However, both HTL participants described ways in which they oversee instructional improvements in their department or SLCs, even though recent changes in the building may have caused these responsibilities to become less of a focus than the HTL participants’ desire. While the preceding sections outlined the responsibilities of DHs and SLCCs, the next section highlights the ways in which participant responses suggested that, in this context, HTLs fill particular roles that extend beyond their more formal responsibilities and that there are several broader functions that HTLs serve for teachers, administrators, and students.

**HTL roles.** The responsibilities outlined in the previous section speak more to the specific duties HTLs perform. However, participants described HTLs as serving particular roles within their school’s leadership structure. These roles more generally reference how others see the purpose of DHs and SLCCs, how these HTLs see themselves in enacting their leadership responsibilities, and how they experience being in a position of leadership between teachers and administrators. Despite their overlapping responsibilities, HTLs were identified by participants using distinct descriptors that suggested DHs and SLCCs serve different purposes in the building, respectively: (a) Implementer and (b) Initiator. However, they both were also identified with a shared role descriptor: Advocate.

**DH as Implementer and Dean of Teachers.** When I asked about the duties and responsibilities of the DH in individual interviews, participants reported their perception of these HTLs as state or district mandate Implementers. In the final group interview, I asked the HTLs about the perceptions I had gathered; they confirmed, actually using the term “implementer” (personal communication, January 11, 2016) to describe the DH position. Mark, explained his role in this way:
Essentially, whenever something comes up in the District, the department chairs see it first, and then we somehow have to make it palatable for a number of us to swallow. . . . I guess in some ways you could look at [DHs] as implementers of District mandates. Cause [sic] I feel like if I'm ever yanked out to go to a meeting it's because something new has happened. (personal communication, January 11, 2016)

The following excerpt from the group interview with the HTLs’ teacher role partners is another example of how participants described the DHs’ as Implementers. In fact, this example suggests that teachers also desire more of a connection between the HTL positions and instruction. When asked to describe DHs, the teachers responded:

Jeff: Also, one of the things that [prevents], I think, our department chairs from having more academic explorations or assistance . . . is that some of the school district mandated thing. The SLO's for instance, that take up so much planning time.

Margaret: Well, that has taken up a lot of professional development for a while and—for [the DH] to explain what we're doing and how we're doing it because it's not self-explanatory. Then there have been other times when we've focused on making common assessments. Which is another—there’s a tiny academic piece to that, but there was also a gigantic mechanical side that didn't have anything to do with the academic part of it. Then, there are the benchmark things. Sometimes we spent entire PD’s on benchmark details and there's so much—

Sarah: Mandated stuff.

Margaret: Froo-froo. All these tests of every sort, but forget about academics. We're going to do this SLO stuff, and we're going to fill in all these forms and send all this stuff—

Jeff: In ten years, I've had two department heads, but it's never been a source of content knowledge. Our current department head could be that source, but it just hasn't developed that way. So what that role, I think, has developed as is, yeah, to be the people who make sure specific teachers complete those mandated components, benchmarks, SLO's—

Sarah: Bureaucracy. The Bureaucrats. (personal communication, January 12, 2016)

Later in the group interview, these teachers would identify DHs as “more Dean of Teachers” in that they must ensure teachers are “doing what they are supposed to” in connection with district mandates. In his individual interview, Mark, the DH participant expressed his frustration that many of the directives he must implement are mandates that have been “uninformed by teachers,” and as a result, he must absorb negative feelings from teachers as he facilitates completion of these tasks. Mark described himself as “frazzled” when filling this role.

However, even though they are Implementers, DHs are not without some flexibility in
enacting mandates or administrative directives. Explaining, Mark reported that he works “in conjunction with administration”:

> If there are things they want us to be, for example, right now writing is a big deal, a big thing, so they don’t really seem to care how we do it, just as long as we do it, and it’s relevant and it fits in with instruction. . . . I have to run it by them [administration], and most of the time they are alright with what I decide, and sometimes I have to kind of tweak. (personal communication, December 7, 2015)

Karen and Shannon, who are not officially DHs, serve informally in a similar capacity to Mark because of the special certification areas their SLC faculty teach. While normally DHs are responsible for SLOs and common assessment rubrics or data for example, in their SLCs many of these responsibilities fall to Karen and Shannon.

Participants accompanied their descriptions of DHs as “implementers” and “bureaucrats” with particular processes that suggested how these HTLs go about fulfilling this role, the ways in which they enact these functions. Verbs such as “explain,” “complete,” and “facilitate” suggest the DHs merely assists teachers in completing the directive or mandate. Other words and phrases in participant responses, such as “tweak,” “shape,” “make palatable,” “be diplomatic,” suggest that a DH mediates teachers’ reactions to mandates, makes adjustments to or changes elements of the administrative charges based on what may be appropriate for content area instruction. For example, Mark described this process of adjustment as “tweaking” and described trying to fulfill the requirements of the mandate in ways that make teachers happy while at the same time giving administration what they want. For example, he described engaging his fellow department members in shaping adjustments to implementing new SLOs, saying:

> A lot of the things that have been thrust on us, like the SLOs…especially with the way the district is having us administer them, it just doesn’t fit with a district this size. But, since we [department] have to do it, our mindset has been we’ll at least try to do it in a way that will at least be somewhat meaningful for our kids. So we have to kind of work together to kind of figure these things out sometimes. . . . mediate and try to make it fit so that it is actually something that will make it meaningful to the educational process, as well, I think. (personal communication, December 7, 2015)

Karen, while not a DH, in fulfilling similar duties, described having to “adapt to” administrative “wants.” She described a time when administration approached her about specific “look-fors” they would using as part of teacher evaluations that they wanted Karen’s teachers to adopt. She
felt administrations were expectations were unrealistic based on the unique project-based nature of many of her SLC teachers’ classrooms. She reported:

What’s happening is, is we’re struggling . . . because when they decide, you know the state, or even the city level, when how you are going to evaluate teachers, but they are not thinking of the [specialty area] teacher. They are thinking of the non-[specialty area] teachers. So when their evaluation is a certain rubric, and it doesn’t fit the [specialty area] teacher, now we have to put on a dog and pony show when we’re getting observed so that we are doing what’s on the rubric. . . . So, I told a couple of teachers, you know, why—don’t put on a dog and pony show just because of the evaluation. If you’re not planning to do theory that day and everything is practical that day. Don’t change to theory just because he’s [administrator] coming in. Do what you normally do. Otherwise, you know, you have them thinking you’re doing theory every single day, and you’re not doing theory every single day. There are days that are just practical days. They have to practice what the theory was. But, it doesn’t always fit that evaluation sheet. (personal communication, November 4, 2015)

Processes such as those described in these data excerpts were often accompanied by verbs attributed to how these mandates or directives were delivered, such as “thrust,” “thrown,” or “dumped on.” This kind of language may have implications for how DHs and those who serve in similar capacities experience their roles as Implementers or “Dean of Teachers.”

**SLCC as Initiator and Dean of Students.** Where DHs are described as Implementers, SLCCs reported that they are more Initiator. To quote Justin, an SLCC for a program with special admission, unlike DHs, “we’re free from that burden, and I don’t really talk about that at all within my SLC because I see it is department chairs that are doing that work.” He elaborated, saying:

This is where, I think, the department, they’re at a disadvantage in that. Theirs is mandated. It has to be a certain structure. Ours can be much more teacher input. We could really go the direction that the people have discussions and say, “What do you think?” (personal communication, January 11, 2016)

As he described his role in the SLC, he said “it’s supposed to be a learning community,” and his job is to “kind of [develop] the community life and kind of doing that in an academic kind of fashion” (personal communication, November 3, 2015). In consequence, he details initiating some “social” activities, program assemblies, contests, and fundraisers. However, he also described how the purpose of SLCCs “is getting the teachers together on an academic track. ‘How are we going to raise our academic standards . . . in the overall structure of the school?’” In consequence, he and other SLCCs detailed proposing and “creating new courses” or course
levels, “bringing [two programs] together” and “thinking about ways” to “increase options for our students” (personal communication, November 3, 2015). Other ways in which the SLCCs spoke of being Initiators was to recommend or request teacher assignments with the administration and Roster Office. While these kinds of decisions are not the SLCCs’ alone, they do “have a little bit of say” or “a little bit of influence.” As Justin, mentioned he did initiate and was able to “get rid of one teacher last year” he felt did not meet his expectations for the “level of engagement” he needs from the teachers in his SLC (personal communications, November 3, 2015). Shannon described creating or finding opportunities for professional development for teachers who need training in her specialty area. She reported “reaching up to the department heads to get their teachers to go to a PD that is coming up” (personal communication, November 5, 2015).

One of the SLCCs reported that initiating changes or actions on behalf of her programs came with time and experience in her position. In her words:

When I first took this I was really following direction, doing what I was told to do. Now, I am comfortable throwing out new ideas, things that we could put together. . . . Around the third year of this position, I probably stopped just doing what I was told and started thinking outside the box, much more big picture looking [sic], really feeling comfortable kind of doing my own thing, and like pushing the boundaries and saying, “Okay…we’re going to do this. I don’t care if nobody else is doing it.” And then, pushing [Principal Michaelson] to say, “Hey, we needed to get these other four programs to be doing this, too.” (Angela, personal communication, January 11, 2016)

In this excerpt, Angela implied she learned where and when she could “[push] the boundaries.” In the group interview, she also referenced traits or attributes that enabled her to be able to “push” when she felt she could. She described herself as “outspoken” and “able to say, ‘Wait. Stop.’” Similarly, Shannon was described in the group interview with SLCCs as a “real task master,” while Justin is quick to mention that many of them (the HTL participants) are now forthright and “probably don’t ask [for permission] anymore.” In other words: “We just wait to be told later that we’re not allowed to do that. The first year you ask, and then after that you just decide, right” (Justin, personal communication, January 11, 2016).

Another possible tension exists in the data between the SLCCs’ roles as Initiators and instructional leaders and how they are often seen more as disciplinarians. As Shannon reported,
she feels as though this is the function students believe she serves. To quote: “the kids see me as the disciplinarian, more of that . . . But, it's not really what I would like” (personal communication, November 5, 2015).

While teacher role partners described DHs as “Deans of Teachers,” they reported that SLCCs are more like “Deans of Students” in that they handle student discipline and communicate with parents, families, and community members. In fact, one teacher said he believed that students, when they first come to the building and are new to the role of an SLC, mistake this person for a principal (Jeff, personal communication, January 12, 2016). An administrator role partner of the SLCCs actually used the analogies “Dean of Student Life” and “small school administrator” to illustrate the dual roles of SLCCs as those who “manage the overall climate” of the building and provide a “choke point for student discipline going up” (Jones, personal communication, November 23, 2016). Mark, the DH used the term “mini-principal” to describe how he saw the difference between his role and that of the SLCCs. Only one SLCC used this same term, but others included: “the overseer of discipline,” “the principal of my small learning community,” and “the Dean, in a way.” Interestingly, despite the references to SLCCs as “dean” of some type, the building does have a Dean of Students who also serves a disciplinary function in the building. As Angela explained it:

I talk to the Dean to make sure that things are getting done. . . . I will do suspensions myself without a problem, if she doesn't get them done. . . . I'll do the paper work side and even make the phone calls home and everything. (personal communication, November 19, 2015)

Other processes associated with this SLCC role that were reported during interviews or witnessed during job shadowing included the following: monitoring the hallways for movement between classes, handling uniform violations, addressing tardy students in the hallway, and consulting with parents on student attendance issues. I also saw several interactions of the type Shannon reported in her interview as part of this “Dean” role: “Any teachers have any problems with students, they send them to me. They call me, they send me emails. I'll issue exclusion letters, suspensions, things like that, meet with the parents” (personal communication, November
5, 2015). In this way, the SLCCs actually are serving or performing a function that the data suggest is part of another role both types of HTLs serve in this context as detailed in the succeeding section.

**HTL as Advocate.** Participant reports of the roles and responsibilities that HTLs fulfill in this setting suggest that DHs and SLCCs serve as Advocates, for teacher, students, and their program or SLCs. For example, participants used the word “advocate” (as both a noun and verb) to describe HTLs and what they do. They employed phrases that suggest HTLs are aware of and “fill the needs” and “serve the best interests” of teachers and students.

For example, Justin described himself in his role as follows:

A kind of student advocate who [breaks] down a big impersonal, large, both program and super large school. I'm that critical piece that—student advocacy, communication, problem solver. I'm that filter that is able to connect people or students or families to services. (personal communication, November 3, 2015)

Karen would repeatedly identify herself as an “advocate” and described her responsibility “to advocate for [her program].” Additionally, she would suggest that the reason for her advocacy was the “stigma” attached to student and teachers in her CTE program, saying: “I advocate on many different levels, with the state, I advocate with the city, and I advocate locally. . . . I don’t think we [CTE] get the credit we deserve” (personal communication, November 4, 2015). Part of this advocacy more locally for Karen is “getting the right people,” or teachers into her program. She reported that her teachers “have to believe in what [they’re] doing. They have to believe in the kids and understand CTE kids” (personal communication, November 4, 2015). In this way, she described advocating both for her program and students, but she also referred to part of her role as SLCC as advocating for teachers, as well, saying:

You have to build trust; you have to make them realize that you are—you know, you’re their [teachers] advocate, too. You’re the middle man. And, in a way you are the advocate between them and the administration. The administration, think about it, with two-hundred teachers on staff, everybody has a complaint, there’s gonna [sic] be a line out the door. But as a group, if you bring your complaints to me, I’ll break them down and present them. And they know I do. They know I do. And they know I’ll fight at an [administrative] meeting for them. And I’ll be outspoken about what they need, if there’s an issue down here. (personal communication, November 4, 2015)

Here, Karen extends an idea that she mentioned earlier in the interview regarding how she helps
administration understand the unique make-up of her teachers’ project-based classroom instructional practices connected to their industry specialties.

All of the HTLs in CHHS mentioned similar kinds of advocacy work as part of their positions. Shannon said of her teachers that “if someone asks for something, I’ve got to do it. It’s part of that trust.” She also reported that her job is to “advocate for students, families in the community” who have unique and diverse needs as newcomers to the school, region, and country” (personal communication, November 5, 2015). Angela described how in her position as SLCC she is “always thinking about the student benefit,” and when it comes to her teachers, her job is to “[read] people and what they feel they need to feel appreciated” (personal communication, November 19, 2015). Mark reported a central part of his role is to “assist teachers with whatever they need” (personal communication, December 7, 2015).

There was consistency in the way HTLs’ role partners equated advocacy with “filling needs.” Assistant Principal Jones mentioned in an individual interview that he felt the HTLs in the building were there to address “basically what needs are to be met” for students, teachers, and parents (personal communication, November 23, 2015). During the group interview, the teacher participants described SLCCs, in particular, as their “go to person” (Jeff, personal communication, January 12, 2016). In fact, one teacher reported that before she would “ever go to an administrator,” she would go to her SLCC because of the relationships that this HTL has with both students and with teachers. In her words: “She [SLCC] knows me. She knows the kids” (Margaret, personal communication, January 12, 2016). In consequence, she and another teacher mentioned that they “can rely on” their SLCCs to respond to issues and problems, whereas they may not receive a response or answer from administration. To quote one of these teachers: “I know I’ll get a response. I know I will” (Margaret, personal communication, January 12, 2016). Another teacher in the group confirmed that due to the size of the building, despite the number of administrators (eight), they do not know the teachers and the students as well as the SLCCs. Consequently, the SLCCs especially are a “wealth of information,” and “where we go when we need anything” (Sarah, personal communication, January 12, 2016). Jeff mentioned that
part of the reason the SLCCs can be “go to” people is because their job is “to have their finger on the pulse” of the SLC—“they know the kids, they know what’s going on” (personal communication, January 12, 2016).

All of the teachers commented on the relationships they have with their SLCCs and DHs that enable them to be able to approach these HTLs with problems or issues with students or otherwise. For example, Margaret said the following:

And I know that she understands where I'm coming from. I know that she's going to take my request seriously, whatever it is. I think certainly having a personal relationship with her, it makes a difference where we see each other. I'm an entity to her. She connects me with a face as far as I'm concerned...there’s more of an esprit de corps there too that has developed. (personal communication, January 12, 2016)

The examples cited here not only suggest that HTLs serve as Advocates, but also appear to connect this role to the relationships HTLs have or build with students, teachers, and even administrators in order to first be aware of needs to be filled, and then to be able to fill those needs. Additionally, the size of the school is mentioned several times in connection with HTLs’ advocacy. Participants suggested that in a building this size, it is “easy for students and teachers to get lost in the shuffle” (Jeff, personal communication, January 12, 2016).

To summarize, DHs and SLCCs fill varying responsibilities, and as a result, the data suggest that DHs serve as Implementers of building or District mandates, while SLCCs serve as Initiators of change in their SLCs—individuals who maintain the overall positive academic climate through the initiating of both instructional and organizational changes. In these roles, DHs and SLCCs are likened to Deans of Teachers and Students respectively who are responsible either for more direct oversight of fellow faculty or students in their departments or programs. In both positions however, HTLs serve as Advocates, fulfilling the needs and serving the best interests of teachers and students. As Advocates, DHs and SLCCs build relationships in order to become aware of those needs and enable their ability to fulfill them. Serving in this role and the others outlined in the first part of this section of the chapter, CHHS’ HTLs reported multiple benefits. However, the DH and SLCC positions are not without challenges, as well.
Benefits. In the group interview with the HTLs in this setting, I heard mention of several benefits and challenges associated with these leadership positions. “It’s a curse and a blessing, frankly,” said Justin when asked about the benefits of serving as an SLCC in his building (personal communication, January 11, 2016). Karen confided about the challenges of her position: “You are often between a rock and a hard place.” However, Shannon and Angela reported that perks of these positions are “getting to know the students on many different levels” and “getting to meet the families” (personal communication, January 11, 2016). The following sections outline patterns in participant reports of the benefits, as well as the challenges associated with HTLs positions in this setting that have implications for how DHs and SLCCs experience these roles. The section begins with reported benefits, including: professionalism or professional fulfillment, an ability to make change, and the positioning of the HTL as teacher, rather than administrative leader.

Professionalism and professional fulfillment. In a group interview, Jeff, a teacher who works closely with Justin as a fellow department and SLC faculty member, provided language that seems to broadly summarize the benefits captured in multiple participants’ responses: “There are mostly personal benefits and some structural benefits” (personal communication, January 12, 2016). One of those “personal” benefits described by all but two of the interviewed participants, the DH and a SLCC, was related to professionalism or professional fulfillment. In the words of Assistant Principal Jones, for example, serving as a HTL in the building provides teachers “the opportunity to be a professional.” He further explained this sentiment, saying of the position is:

Um, empowering. I would definitely—just knowing that [you] are entrusted . . . You know, once you get into that role and you are successful and you are doing good things for kids, you want to do more. You want to feel that the decisions are coming from you and that those decisions are positive influences on kids’ lives. So the benefit [is] a sense of fulfillment. (personal communication, November 23, 2015)

HTLs who mentioned a similar benefit also describe it as “fulfillment,” but also used the phrase “professional satisfaction.” For example, Justin described the benefit this way:
There is a professional satisfaction of: “This is my program, and I am going to do my very best and pull upon every possible resource to build and grow, and make it what I believe it can become.” There is a team approach. It’s getting your teachers and all of that but, at the end of the day, our [SLCC’s] names are next to those titles, and my name is there. The program reflects who I am. (personal communication, November 3, 2015)

As Justin and his administrator suggested in words and phrases such as “empowering” and “I am going to . . . make [change],” a HTL position in this setting potentially affords individuals an opportunity to effect change. This benefit suggests a feeling of accomplishment that comes as a result of an opportunity to exercise influence over what happens in the department or SLC—the ability to make change. Thus, this feeling of satisfaction or fulfillment seems to be caused when the HTLs take the opportunity to exercise an ability to make change and manage to do so successfully or positively. In that this opportunity helps a HTL to fulfill particular purposes, it represents another benefit participants attributed to these two positions.

**Ability to make change.** Participants described a benefit of the HTL positions to be the affordances that these individuals have to make local or school-based decisions that can have an influence on students or the system. All of the HTLs highlighted this influence as a benefit of their positions. For example, an SLCC and the DH described this benefit during the group interview in this way:

Mark: I think one of the biggest benefits is . . . our administration is, in a lot of ways, very hands off. And in some ways, I think that’s a good thing, too. They do allow us to shape a lot of things. By and large . . . I think that’s one of the big benefits, that we shape our own destiny in some ways.

Angela: I think that certain of us in these positions have a level of autonomy that others may not based on the level of trust that we’ve built with the administration . . . and I’m sometimes actually overwhelmed or surprised by the amount of autonomy I’m given. (personal communication, January 11, 2016)

Karen added that her SLCC position “allowed” her to use her specialized knowledge of CTE to “take [her program] to places where [she didn’t] think [she] could have taken it in another school.” She finished, stating: “We got to create this thing!” (personal communication, January 11, 2016). While in this example Karen mentioned a local change that resulted from the increased autonomy afforded by her position, she and other participants also mentioned the ability to effect change more broadly.
For example, Justin described how his position is a “forum” or “platform” to be able to “make a difference with students,” describing his SLCC position as “a role that has some power and ability to shape their destiny [sic]” (personal communication, November 3, 2015). Assistant Principal Jones described this ability similarly, calling it “a way [HTLs] could affect more children and have a larger impact” (personal communication, November 23, 2015) than being the classroom alone. Interestingly, this administrator later referred to the autonomy or decision-making power that comes with the HTL positions as a challenge, as well, because teachers are often not in a position where they can make decisions on their own that affect the system more broadly. He reported:

There’s always that sense of “if I made the right decision.” I’m always used to bringing it things to someone else and saying, “Is this ok with you?” It’s always an unnerving feeling knowing that [you are] going to affect a student or a teacher without someone kind of co-signing [your] decision-making. (personal communication, November 23, 2015)

Teacher, not administrative, leader. Another benefit mentioned by participants is the opportunity continue to be classroom practitioners while also fulfilling their leadership responsibilities. Knowledge of the teachers, the students, and issues that directly affect the classroom are cited as reasons the positioning of the HTL in the classroom is beneficial. For example, a teacher reported during the group interview that because SLCCs are teaching, they “[understand] what’s going on in the classroom,” and “they’re directly invested in what we’re doing because they are right there with us and our kids. . . . They know us and the students” (Jeff, personal communication, January 12, 2016). The other two teachers added that having a DH or SLCC who is also a teacher provides them an “experienced set of eyes,” “expert advice,” a “veteran teacher” (personal communication, January 11, 2016).

A DH, Mark described still being in the classroom as an advantage, suggesting that experience gives him insider knowledge of how decisions he may have to implement as a DH will affect classroom teachers. In his words:

It keeps it real. You walk the walk and you talk the talk. . . . When we [teachers] have to do things, I have to do them. So I’m right there with the rest of my teachers. I have to administer my common assessments. I have to use the same rubrics. I have to use, um, I have to do the SLOs. I have to do everything they have to do, and um, so in a lot of ways
we can work together. . . . I don't care what anybody says, where the rubber hits the road is when you’re in the classroom. And um, all of these people who make decisions for us, a lot of times they are not sound decisions because they have no um, I think, educational credibility behind them because a lot of times they are made by non-educators, period. You have to have your teachers behind you, and I think one of the only ways especially in this day and age now with all the attacks on the profession and all this education reform and all that stuff, I don’t think you really can get teachers to be behind you unless you’ve first taught for a substantial amount of time first yourself. (personal communication, December 7, 2015)

Justin reported similar benefits, saying that continuing to teach his own classes “is excellent” because:

> Everything that they [administrators] say, I immediately can filter to what it means to people who have five periods and an advisory. I hear it that way. . . . I know when they say, "Do item analysis," I know people are going to be mad, and I know why they’re going to be mad. And, I know why we should be mad and I . . . I have not, I don’t feel distant at all from any teacher, and I don't think that they feel distant from me. (personal communication, November 3, 2015)

Here, Justin referenced his lack of distance from or a closeness to faculty as a product of his remaining a teacher. Similarly, Karen and Angela mentioned their connection to teachers as expedited not only by their continuing to be responsible for their own classrooms, but also by their inclusion in the collective bargaining unit, or union association. For example, Angela reported:

> I think that there is a level of trust that is implicitly there because I am a fellow union member. Even people that don't know me well but knowing that we are in a teacher leadership role, that we’re still one of you, for lack of a better term, although I hate that term because it kind of leads to that us versus them mentality. And, I hate that “us versus them mentality” with administration versus teacher. I just don't think that that should exist, but it does exist—and certainly within the teacher perspective because I am a fellow union member. I am a teacher. There is an expected level, implicit level of trust that comes with that. (personal communication, November 19, 2015)

Many of these cited responses highlight relationships HTLs are able to form with teachers because of their positioning as teacher leaders, but all participants also described the ability to form student or family relationships as a HTL as a benefit of these positions. For example, Justin said that he is able to “get to know the students, families on many levels” (personal communication, January 11, 2016). Assistant Principal Jones reported that in such a large environment, having HTLs “allows us [the school] to drill deeply into students’ lives” (personal communication, November 23, 2015).

While all participants agreed that concurrently serving as teachers and as HTLs was a
benefit of these positions, the DH and SLCCs shared that this positioning also was difficult. The next section details this struggle and other challenges present in the data.

**Challenges.** Participants reported difficulties related to the HTL positions of DH and SLCC. These challenges included: (a) HTLs’ middle positioning, (b) HTLs serving as both teachers and leaders, (d) a lack of leadership training or support. The succeeding subsections underscore representative examples for each challenge.

**HTLs in the middle.** As much as continuing to practice in the classroom while fulfilling leadership responsibilities is a reported benefit of the position, participants actually serving in these roles also described their positioning as teachers and as fellow union or association members as challenging. As leaders beyond the classroom, HTLs are charged by administration to fulfill particular organizational and instructional responsibilities that may put them in situations that compromise or complicate their connection to fellow faculty members. Essentially, HTLs reported that they are challenged by this “middle positioning.”

For example, as an SLCC, Angela has some influence in determining which teachers are assigned to her program. According to the job description, she is also responsible for the “overall academic climate” of her SLC. Consequently, Angela reported working in conjunction with DHs and the administration to achieve what she deems the “right fit” for “the good and the bad players,” knowing that she will not be able to achieve a “fantasy baseball team” of teachers in her SLC, but hoping that she will “get close.” For her, the “frustrating place to be” is knowing the following:

> We have amazing teachers in this building, but we have some bad teachers in this building…. Where the struggle comes is—certainly, if the student is in danger there's no question I'm expected to report that. But…a lack of structured instruction and things like that those are things that I'm not really supposed to—Not that I don't speak to administration when there's certainly issues going on, but I have to be much more vague and speak in more hypothetical than this is a specific situation. (personal communication, November 19, 2015)

She uses a recent incident to illustrate her point:

> The other day we had to suspend an entire class because they locked [a teacher] out of his room, he's not a new teacher, he's been teaching for years . . . and why are we not
following through with this? That’s frustrating, we don’t have that power, we can make recommendations, but we’re fellow union members. I can’t just go and say, I mean, he could file a complaint with the union against me if I were to walk in to an administrator’s office and say, “This is a list of things I saw in this classroom.” We can have conversations, generic conversations, but I can’t just walk in. And if I did, where is it going to go? As [SLCCs] that’s something we face. (personal communication, November 19, 2015)

Angela’s description references her lack of “power.” As teacher leader, she does not have the positional authority to handle the situation she details more directly. Rather, she reports indirect, and hence, more challenging means she might employ to handle the situation, such as “hypothetical” or “generic” conversations that could mobilize administrative attention to the situation, but also could lead nowhere or to unknown consequences (“where would it go?).

A related challenge, HTLs reported being asked by administration to fulfill particular responsibilities that could require DHs or SLCCs to act in ways that may compromise other teachers’ perceptions of them as “fellow teachers,” thus damaging the trust and unity HTLs reported having or wanting to create among their faculty as colleagues. Furthermore, HTLs reported wanting to act in the best interest of the students, but sometimes doing so could also put the aforementioned relationships into question. The following excerpt from the HTL group interview provides an example of how these participants spoke together and individually about these challenges:

Karen: The problem is when you know the kid's right, and the teacher is in the wrong, and that puts you in a very awkward position. . . . In that case, when the parent calls or when the kid comes to me, I know it's true, but what do I do? I'm in a very awkward position. When I try to shoot it upstairs to the administration, they don't want to handle it either, so I'm caught between a rock and a hard place as the SLC coordinator. I'm not sure I can say anything to the teacher about it.

Mark: One of our administrators [came to] walk through our department. Suddenly, that became my responsibility to, I found this out today, that the [DHs] were supposed to put out an email to everybody kind of outlining what they saw, problems with what they saw, and things that are supposed to be corrected, which I'm fine with that. But once again, I'm—Do you know what I'm saying? I'm [union] along with everybody else. I guess you can get into that slippery slope. I can't tell you what to do. I can suggest what maybe you need to do, but I can't, more or less, tell you what to do.

Justin: They put us in the middle often times. Most of us are okay. We understand that the role comes with some natural middle tendencies and that's fine. It's when it gets to be very evaluative and assessment, that's what we don't want to do. We don't want to have conversations about it; we don't want to be the ones responsible. . . . I feel like they're
using—that will create more tension by putting us into that place. That would create more—some of our teachers don’t trust us, or don’t trust me because we’re sometimes in that place and they know it. I don’t want any of the administrators to talk even about me, mention that I’m looking at that. I feel like that should be clearly in their square. Lesson plans, evaluations, observations, and attendance to me—those are the three big things that should be in their purview and their purview alone, and not under our jurisdiction. It doesn’t go over well, and then, again, that can lead to things you want to get unity around that go out the door.

Karen: Exactly.

Justin: Right. Yes. It takes a long time. I’m three years in, which in some ways is a lot, but some days it’s like my first day. . . . I’m still in the fight for my life. It takes a long time, and if you go in and do something like that, it could take you the rest of the year in common planning time to get people to see you again.

Karen: Well, the thing is, this is about trust building.

(personal communication, January 11, 2016)

These HTL participants described this “middle” positioning as challenging because it influences how they must respond to teachers and fulfill their responsibilities. But HTLs reported an additional challenge associated with being both teacher and leader: balancing their classroom and leadership responsibilities simultaneously.

**HTLs as teachers and leaders.** Four of the five HTL participants in this study were teaching at least three classes in addition to filling their leadership responsibilities. All of them had taken an additional course preparation during the 2015-2016 due to a teacher shortage in the building. Even more so because of additional courses, HTLs still active in the classroom reported challenges balancing classroom and leadership responsibilities at the same time. Words and phrases such as “guilty,” “limited,” and “pulled in many directions” highlight feelings HTLs reported. These participants described balancing resources of time and energy, as well as facing physical and logistical challenges.

For example, Justin responded:

I think that’s hard. If I’m being really honest, which is hard for me to hear. I’m probably not as good a teacher as I was before I was in leadership. Because time—priorities, too much to do. Can I do a lesson with 5 seconds notice? Yes. It’s no problem, and maybe that has nothing to do with the leadership. It’s just 18 years now. A lesson is not a problem. Really doing a really phenomenal lesson that meets everybody at every level and is current and relevant and up to date and fresh? It’s hard because that takes the prep work which—my evenings now are probably almost an hour of email. Student email, parent email, other teacher email, administrator email, whereas before that could have
been researching in depth my topic that I'm going to cover the next day. . . . I have a great deal of knowledge and lessons to fall back on, but they're not being refreshed and renewed. . . . I think it stresses me, the teacher. (personal communication, November 3, 2015)

Karen expressed a similar sentiment, reporting: “My time that would be spent on lessons is spent on SLC work” (personal communication, November 4, 2015). Angela explained that these circumstances often require a balancing act or a “trade”:

There are days when I feel like my classroom presence suffers because I am preoccupied by the leadership responsibilities that I have. There are days when I feel like my leadership responsibilities are taking a back burner because I'm really focused on my instruction and getting stuff from the teaching side done. I would say the last couple days my leadership has been on the back burner with grades being due. I just needed to bang through some stuff and get it done, and right now is worse than it's really ever been because I have long term coverage. . . . It really depends on the schedule, it depends on what my priorities are. And really, I mean that's a major part of my position, is prioritizing. I mean, "What is the most important?” (personal communication, November 19, 2015)

Physical and logistical challenges. During site visits, I followed the teaching HTLs as they wheeled carts from their offices to classrooms through crowded hallways that the SLCCs also were responsible for clearing. Many of them handled discipline infractions in the hallways on the way to class. As a result, the only HTL I did not observe being late to each class was the DH for whom discipline is not a duty. SLCCs also were interrupted during classes by teachers and students for reasons connected to their leadership responsibilities. During a site visit, I observed one SLCC who was interrupted four times in a twelve minute period while teaching.

Time constraints. Time became a challenge for HTLs trying to fill both sets of responsibilities. While some HTLs taught their classes consecutively, in a single block, others had classes spread out in the bell schedule, leaving limited time in between classes for sustained interaction with other teachers and students in their capacity as DH or SLCCs. The following excerpt from the group interview with the HTL participants further summarizes the challenges associated with filling both classroom and leadership responsibilities:

Mark: I think it’s possible to be good, but I don’t think it’s possible to be great.

Karen: I was swinging from—when I had two classes, and they were boom, boom right in a row, I could concentrate on those classes, get done what I had to do. Then I had a large block of time to get done on the SLC work. Now, it’s like you see our schedules.
Well, you know our schedules. It’s like maybe one on, one off, one on, one off. The hats keep switching.

Justin: That’s a very practical. That makes a difference. Having them together because you can kind of put it on, take it off, put it—

Mark: Well, when I first began and became Department Head six years ago, six years, I had two classes only, and they were back to back. And, that’s how it always was. But then, when things changed they were all over the place and none of this here, like you said, one on, one off, one on, one off. When they threw me a fourth class for a while, it was all over. Yeah. I was all over.

Karen: You can’t get much done. It’s unfair to the kids and their classes and not fair—

Justin: You can be effective, but not exceptional and everyone here would prefer to be exceptional, I think. (personal communication, January 11, 2016)

**Isolation and lack of support.** The final challenge represented in the data was reported solely by the HTLs in this setting. HTLs reported that there is no leadership training provided when an individual acquires these positions. Additionally, while the administrator believed that there were rare opportunities for professional development provided to HTLs when budgets allowed, the HTLs reported that there was “little” support available to them in their positions of leadership. And yet, each of them described wanting to “grow” or “improve” in their leadership and expressed desires for additional support. For example, Mark reported that moving forward he wanted to work on “keeping the relationships [he has] with [his] colleagues and trying to build relationships with those that [he doesn’t] have as much of a relationships with (personal communication, December 7, 2015). Karen described how she has had to learn on her own. When she first started in the position as SLCC, she said:

It was like, “How do I bring these people together?” And, I think prior to being the leader, I think there was a mutual, collegial respect for each other. I wasn’t a pain in the butt to people, and I tried to get along with people. But, I really had to learn to speak up and say things I disagreed with or whatever. And, that wasn’t part of my nature. Like I said, I’m a good soldier. And like, you tell me what to do, and I’ll do it. Generally, I never argued with people. And I never argued with adults. I had to learn that on my own. (personal communication, November 4, 2015)

Karen suggests that assertiveness was part of her early independent learning as a leader, but the example below represents how these HTLs also desire continued learning and support in their leadership positions. When asked about not having any leadership training or professional
development, Justin reported:

I think that's probably fairly common for teacher leaders . . . but long term, if you want to grow? I can read. I loved Amanda Ripley's book. It helped me think about things, but I still feel like I want somebody to be there with me and push me and challenge me . . . to dig into this: “How do we get that to happen? What's that going to look like between teacher and student?” I’m hoping that I can have an AP [assistant principal] next year, and I’m hoping that then I can grow, or have somebody to really—I don't know, mentor, critical thinker mentor that I’m looking for. Somebody who will read all the emails and say, “You didn't strike the right tone, or you conveyed the wrong message.” Somebody who would say, “Boy, these goals are just up there.” I want somebody who will really hold me accountable in a way that will help me to grow, and I don't have that. I don't have that with anybody. (personal communication, November 3, 2015)

The sense of isolation Justin’s comment suggests highlights the lack of leadership support, training, and professional development that these teachers seemed to feel. HTLs talked about how they have tried to address these challenges by utilizing each other and particular colleagues, as well as by seeking outside development opportunities. The following excerpt from the group interview with these HTLs provides illustration:

Interviewer: All of you reported that there is no professional development or training for these positions. Could you—

Karen: Sink or swim.

Interviewer: So talk to me about where you go for support, if you need help?

Karen: To each other.

Justin: Each other. I mean, we are our greatest resource.

Justin: I have two teachers in my department . . . that are my sounding boards for everything. I don't cross the street without them, without knowing what they think or what their—perception is going to be. I think we also go to people who aren't in our role just to see what the perception is.

Karen: Sure. You can bounce things off them.

Mark: Yeah, before you go to do the whole department. I have two teachers at my department in particular that I use. They’re the ones I usually go to because I know they’re going to tell me the good things about it, whatever it is. Then, the other is going to give me the critique. I kind of use both in both areas, and I use that to base my decisions on, how I’m going to approach them [teachers].

Angela: I have the same . . . I also seek outside opportunities. I did an entire class called Professional Learning Networks so it gave me an opportunity to—but that is all within my own personal, seeking out my own personal—

Karen: When I became a Coordinator, I think I told you this. I have no desire to be a
leader. I’m a really good soldier. I’m a good follower and I only did this because I just felt like that the right people weren’t stepping up and I had no choice. I read books on how to lead people and how to persuade people—to try to get people to see certain things because I really walked into the lion’s den. I really did. (personal communication, January 11, 2016)

In summary, this section detailed HTL participants’ reports of the challenges associated with their positions in this context, including tensions between their association with fellow faculty or union members and their administratively assigned responsibilities. Other challenges connected to the formal posts of DHs and SLCCs were balancing classroom and leadership priorities and feelings of isolation caused by lack of leadership support. The next section outlines what the data suggest as influences on HTLs’ desires to serve and potentially remain leadership.

Influences to serve and remain. All mid- to late career teachers, the HTL participants each held other school-based leadership posts, prior to taking on their current positions in the CHHS. These leadership positions included: extracurricular activity sponsor or advisor, program coordinator, or administrative committee member/faculty representative. Two of the HTL participants also held union leadership positions at the building level. Table 4 indicates the HTLs’ years of teaching experience, the number and type of leadership positions they have held, and the years within their teaching career when these participants acquired their first leadership positions. In individual interviews, HTLs identified critical or important influences they felt led them to want to take this particular hybrid leadership position or others. The subsections that follow detail the patterns of influence suggested by HTLs in individual interviews, including: (a) influential individuals and (b) a call to serve.
Table 4

*Teaching and Leadership Experience of Chestnut Hill High School Hybrid Teacher Leaders*

<table>
<thead>
<tr>
<th>Years of teaching experience</th>
<th>Years in current leadership position</th>
<th>Years teaching prior to current position</th>
<th>Years teaching prior to leadership</th>
<th>Type of prior leadership position</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLCC Shannon—25</td>
<td>(9)7</td>
<td>17</td>
<td>4</td>
<td>Program Coordinator</td>
</tr>
<tr>
<td>SLCC Karen*—19+</td>
<td>10</td>
<td>9+</td>
<td>4+</td>
<td>Program Coordinator</td>
</tr>
<tr>
<td>SLCC Justin—18+</td>
<td>3</td>
<td>14</td>
<td>10+</td>
<td>Activity Sponsor Union officer</td>
</tr>
<tr>
<td>DH Mark*—18</td>
<td>6</td>
<td>12</td>
<td>12</td>
<td>School Committee Union Representative</td>
</tr>
<tr>
<td>SLCC Angela*—12</td>
<td>6</td>
<td>6</td>
<td>4</td>
<td>School Committee</td>
</tr>
</tbody>
</table>

Note: SLCC = Small Learning Community Coordinator; DH = Department Head; * denotes career change; + denotes additional partial year of experience; (#) denotes number of years in current leadership position before changes to title and responsibilities.

*Influential individuals.* All of the HTLs identified influential individuals who affected their decisions to eventually take on leadership positions beyond their classroom responsibilities. These individuals included family members or teacher colleagues who encouraged the HTL participant to pursue teaching or provided models of effective teaching or leadership. In addition, three of the HTLs mentioned school leaders who were instrumental in bringing these participants into their current positions.

For example, Mark described how his parents “always pushed education” and said that his mother, a special education teacher, influenced his decision to eventually become a teacher, saying: “I saw her as a very strong person who had a very positive influence on so many kids” (personal communication, December 7, 2016). Angela similarly mentioned a parent’s influence, her father, who she described as a “bull by the horns” kind of person. She said that she “now knows when to be light-footed and when [she] can take the bull by the horns” in reference to her taking initiative in making change as part of her SLCC position.

Teachers, mentors, and principals are among the influential individuals identified by HTL participants. In fact, every HTL participant identified a school-based individual as affecting their
decisions to lead or take on this position. For example, Karen referenced her first mentor who "instilled confidence" in her during the first year on the job after a career change (personal communication, November 4, 2015). Justin said of his first school: "There were teacher leaders there" (personal communication, November 3, 2015). However, he did not intend the phrase to mean formal positions of leadership. Rather, he referenced a "phenomenal mentor" teacher and colleagues who helped him to experience the "best PDs [professional development] of [his] life." He also identified a principal in this setting who provided an example of "what leaders were capable of." Justin said working in that setting with the individuals he named was "transformational" (personal communication, November 3, 2015). Mark similarly noted that a mentor who "became like a second mother to [him]" and provided an example of effective leadership, saying: "She was grace under pressure" and a "straight shooter" (personal communication, December 7, 2015). Angela, on the other hand, had a cooperating teacher who, while influential, proved to be so in a negative way. As Angela described it, this teacher would leave her completely alone during student teaching, and as a result, Angela had to "take control." She said: "I think sort of that experience that I'd been thrown in the deep end, and it's sink or swim time was a really important experience for me" (personal communication, November 19, 2015).

Karen, Shannon, and Angela also referenced current building administrators who as principals or assistant principals at the time, proved influential. Not originally seeking their positions of leadership, these three individuals were encouraged by building administrators to take these leadership positions. In fact, Shannon did not even apply. Rather, she walked in one autumn to find out she had a reduced roster. An assistant principal who has since left had recommended her for the position. This same administrator had also encouraged her to get her administrative certification. She said of that leadership program: It "helped me reflect on what being a leader means in terms of staff." A self-described "quiet leader," she says she is now "more assertive" and "not afraid to say certain things," if it will "help the students" (personal communication, November 5, 2015).
A pattern in the way that these school-based influencers were described suggests that they not only provided encouragement, but also opportunity. Mark mentioned a former DH who often “delegated” responsibilities to him. For Justin, his first leadership position as an activity advisor was a position he wanted, and the administrator he approached before, although skeptical at first, gave him the position that would eventually lead him to his current position as SLCC, which he deems an “even larger platform” (personal communication, November 3, 2015). Karen would be given an opportunity to create an entire program at her first school because of her specialized knowledge. Not in a formal leadership position at the time, she cites this experience as influential in her decision to apply for her current position.

**Call to service.** In addition to the individuals who influenced them, each HTL reported wanting to make change or be instrumental in helping improve students’ experiences. In particular, the HTL positions in which they serve became what some of them call “platforms” or “forums” to accomplish a desired goal in connection with students or teachers. For example, Mark described wanting to create more professional collaboration among the teachers in his department and between departments. Karen and Angela spoke of wanting to make changes within the school that they believed would help students more directly. When the position for SLCC of her program became vacant, Karen described why she decided to apply for the position. Hesitant at first, she felt strongly that the person in the SLCC position for her program needed to be connected to its students, teachers, and content, as the following excerpt illustrates:

I really didn’t think I had leadership qualities. I mean, I’m a good follower; I’m a good soldier. And then, I heard rumor of the person that they were going to put into the position which was a foreign language teacher which really kind of bothered me. Because, I felt the person in charge needed to understand vocational education . . . have a passion for CTE students and teachers. . . . Because my experience in the other programs told me that there is a lot of prejudice against the teachers and the kids. But, we have to make this like a safe haven, a place where we’re learning. . . . I applied. And, I think it threw the principal off-guard. . . . I looked at him, and I said: “Let me tell you what I can do, OK. I’ll pull this whole program together. I’ll make it make sense. . . . I know about CTE, and I can help make it happen.” And so . . . I told him the things I could do. . . . I was going to be proactive about putting this program together. If you don’t understand the kids and the teachers, you don’t understand the program. And, I just felt like those people were just managing the program. They were just doing discipline and supplies, teacher supplies, managing. They weren’t leading the program. Leading the program you develop a vision, a goal. And you try to get the right people to help you meet that goal. (personal
Similarly, Angela felt as though she had gained an understanding of the unique needs of students transitioning into the building. She reported that she was “interested specifically” in her SCL program and not “so much . . . in Coordinator.” In her words:

I really feel like . . . we need to be focused in specifically on those [transitioning] students, and it's your, your laying the ground work for everything that's going to come after that for them. . . . I had done a lot of reading at that point and understanding it is such a crucial, critical year. And, you're really laying the groundwork for everything that's going to come after it and . . . they need someone to hold their hand. (personal communication, November 19, 2015)

These HTLs also shared broader goals, such as “making a difference for kids,” “shaping student destinies,” “advocating for families.” For example, Justin said that he “wanted urban.” When asked why, he replied: “It's always been very much of a mission for me, very much of a calling I would say. It's been very much part of what I wanted to do all throughout college” (personal communication, November 3, 2015). He described the difficulties of his first full-time setting, saying that he saw “a fantastic leader” and the “best teachers [he’s] ever seen,” but they just could not “turn around” that setting. He almost left teaching altogether after the school eventually closed. When he was re-assigned to Chestnut Hill, he said he saw an opportunity:

My first two years [here] I just was a teacher, but I loved what I saw. . . . I said, "Wow you can really do anything in this school. Then I said, because I had all kinds of ideas, and I was like I need a forum. How can I get these things to happen? I became the [activity] sponsor, and it just started. We just started doing anything. I've tried stuff. Some stuff we still do sometimes, and some stuff we don't do. But, I was like: "You have a staff here, you have a student body here. I can push this." I can drive an agenda here, almost. It was very intentional. It sounds very, take over the worldish doesn't it? That was the start. . . . I also noticed . . . there's about twenty-five people that actually make this place work, and I said, "I'm going to be one of those twenty-five people." . . . I consciously said I want to be one of those. (personal communication, November 3, 2015)

These representative examples illustrate the predominant influences mentioned by HTL participants. There were other influences mentioned less frequently in the data, these include "looking for" or "wanting a challenge," having confidence in or recognizing increased or specialized knowledge or skills, and having experienced success in other leadership roles. The remaining subsections detail a different set of influences that HTLs reported as factors in their decisions to remain in HTL positions.
**Moving on.** When asked about whether they would like to remain in their positions and what may influence them to remain or to leave, two of the HTLs reported considering moving on or already had done so in some way. For example, prior to the end of data collection one of the four SLCCs had already relinquished teaching responsibilities due to increased demand for her time in other capacities. This change was caused by rapid increases in student enrollment and new state requirements for her specialized program. This same HTL mentioned that in three to five years she “would love to be an assistant principal” (Shannon, personal communication, November 5, 2015). Another SLCC informed me and her HTL colleagues during the focus group interview that she was applying for a position within the building that similarly would take her away from classroom responsibilities altogether. As she described it, this new position’s responsibilities “are half of what [she’s] doing anyway.” She added a potential reason for the move, reporting:

> I would still like to have one class. I think that staying as a [name of content area] teacher there is a lot more to my grading than maybe some other subjects might experience. And, I definitely feel that that is something that suffers in my time management because reading student writing and reflecting on student writing that is just definitely something that suffers in my time management. So that’s a piece that I get very torn between. Where should my focus be? (Angela, personal communication, January 11, 2016).

**Staying, for now.** The other HTLs reported that they would like to remain in their current positions, at least for now. Because there is no financial compensation, for these HTLs, their reasons are more personal than financial. Justin said, “I am happy where I am. I love it.” He described his commitment to his program and to his position, saying: “It is my life. I don’t do much else. . . . This is where I’ve chosen to invest” (personal communication, November 3, 2015). That is not to say that he has not considered moving on himself. In fact, he reported that “there are still days when I want to be a principal,” but he is quick to add that he would not want to “start over anywhere else and leave now” (personal communication, November 3, 2015). Mark and Karen both mentioned not wanting to go “any further,” not wanting “to become an administrator.” For Mark, his current position “is [his] strong point” (personal communication, December 7, 2015). For Karen, becoming an administrator is “just not in my make up” (personal
communication, November 4, 2015). And yet, both of these HTLs expressed frustration. Karen reported being “discouraged by decisions that don’t benefit the kids” and disheartened by the teaching profession “being bashed.” She said she is close to retirement, and while she is not “ready to leave yet,” has set a date in the near future at which point she will re-evaluate whether or not circumstances causing her frustrations have improved. However, she did say that when she does leave, she wants to do so “knowing that what [she] built won’t fall apart.” She wants to “see the program continue,” a desire she says is the reason she is “delegating” more to her SLC faculty (personal communication, November 4, 2015). Similarly, Mark described himself as being “frazzled” and “having days where he feels like running for the hills.” He said he is sometimes “envious” of individuals who do not have other responsibilities. He reported considering “going back to the classroom,” but he also considers leaving teaching. For him, whether or not he remains will be influenced by how much changes in the next few years (personal communication, December, 7, 2015).

**Conclusion.** This section presented data that highlight the ways participants described DHs and SLCCs’ roles and responsibilities, the benefits and challenges of these positions, and the influences on these HTLs’ decisions to serve and potentially remain in these positions at CHHS. Themes and patterns in the data suggested that these HTLs are organizational and instructional leaders. While DHs are described as Implementers of building or District mandates, SLCCs are described more as Initiators of changes within their SLCs, those who build, set, or maintain the overall climate, vision, and goals for their academic programs. While both DHs and SLCCs reported instructional leadership as a desired focus for their responsibilities, increasing organizational responsibilities seem to hinder that goal. Furthermore, while the two formal HTL positions differ in their overall purview, individuals serving in these positions described themselves, and others described them as Advocates who serve the best interests of teachers, students, and families.

Participants reported multiple benefits and challenges associated with filling the roles and responsibilities of DHs and SLCCs. Among the benefits, DHs and SLCC reported were an
increased sense of professional or professional fulfillment and an opportunity to exercise autonomy or flexibility in order to enact change. Although the data suggested that an additional benefit of serving in these positions is the unique positioning of HTLs as teacher leaders, DH and SLCC participants reported challenges associated with their “middle positioning” as fellow teachers and union members with a lack of the positional authority of administration. Additional challenges associated with these HTL positions were balancing teaching and leadership responsibilities, as well as a feeling a sense of isolation due to a lack of leadership support. DH and SLCC participants reported trying to mitigate feelings of isolation by seeking out each other and teacher colleagues for advice.

While not the only factors, HTL participants described family members or school-based leaders who they feel influenced them to lead beyond the classroom. Other influences included feeling compelled or called to make change. Two HTLs reported that increasing organizational responsibilities and decreasing control over such changes may eventually cause them to leave their positions or teaching altogether. Despite these challenges, three of the five HTLs participants reported wanting to remain in their positions, at least for the present. The remaining HTLs had already sought out or moved into leadership positions without teaching responsibilities.

This chapter revealed how participants described the leadership roles and responsibilities of individuals serving in hybrid positions as classroom teachers and as TLs, DHs, and SLCCs in MVHS and CHHS. Additionally, data samples illustrated the ways in which participants discussed the benefits and challenges of these formal positions, as well as HTLs’ influences to serve in and potentially remain in these positions. The next chapter presents data analysis and findings in connection with the questions guiding the study.
CHAPTER 5: Data Analysis and Findings

The study aimed to explore the ways in which teachers serving in hybrid positions experience their roles—roles considered by the research community as part of a potential “fourth policy moment” aimed at flattening school leadership by spreading it to teachers. As opportunities for teachers to lead beyond the classroom increase, teachers must make sense of themselves within these new roles (Margolis & Huggins, 2012). This chapter analyzes patterns in the themes and categories presented in Chapter Four. It outlines relationships in the data that reinforce, extend, or problematize the literature and the study’s conceptual framework, and thereby inform the study’s research questions and sub-questions:

1. How do secondary public school teachers serving in leadership positions experience these roles?
   (a) What contextual factors influence how these teachers experience their roles?
   (b) How do these teachers describe their leadership?
   (c) How do their roles influence the way these teachers describe their leadership?
   (d) How do these teachers negotiate their dual roles as teachers and as leaders?

2. What factors influence secondary public school teachers’ decisions to serve and potentially remain in leadership positions?

Hybrid teacher leaders (HTLs) included in this study serve both as classroom teachers and as Teacher Leaders (TLs), Department Heads (DHs), or Small Learning Community Coordinators (SLCCs). Despite the differences present in the data across these varied roles and between the two sites, there were striking similarities in how HTL participants seemed to be negotiating self-definitions influenced by formal positions that uniquely locate them between teacher and administrative groups within their local and institutional contexts. Therefore, the study data from both sites provide potential insights into how HTL participants may be formulating similar work-related identities (Busher et al., 2007) of middle leadership based on the unique ways in which they navigate within their formal positions. Additionally, administrator and teacher
role partners consistently employed similar identifiers and descriptions, suggesting that these HTLs’ self-definitions are socially constructed in relationship with others in their settings: a “product of lived experience of participation in specific communities” (Wenger, 1998, p. 151).

The study’s original conceptual framework hypothesized that teacher leadership is an “in-between space” where the individual moves from teacher to teacher leader, negotiating a self-understanding, or boundary identity, as the result of practices that provide transfer between teachers and administrators within given contexts (Wenger, 1998). Figure 1 illustrates this space to be a discrete position of inter-agency for the teacher leader, one that provides connection between two constituencies; however, the data reveal that this space is less distinct and one of interaction, rather than mere transmission. Thus, the boxes that represent teacher, teacher leader, and leader actually overlap and intersect, transforming this in-between space into one of concomitant intra- and inter-agency. The HTLs in this study described themselves in ways that suggest they identify with, work within, and connect each group. They also described challenges associated with navigating a positioning that does not move them fully out of one designation (teacher) or fully into another (administrator). These reports are consistent with conceptions of boundary crossing or boundary spanning in the literature (Akkerman & Bakker, 2011; Cobb & McClain, 2006; Wenger, 1998; Williams, Corbin, McNamara, 2007).

Drawing on the research questions, this chapter examines how HTLs in these settings experience their positions as boundary crossers. It explores, the following: (a) what influenced these participants to serve in these positions, (b) how they describe enacting their leadership, and (c) the challenges they report in negotiating their dual roles. It also traces patterns of influence in HTL participants’ decisions to remain in these positions. Finally, the chapter ends with an examination of the study’s findings. The chapter is organized into the following major sections: Responsibilities, Influences to Serve, Experiences and Descriptions of Dual Roles, Influences to Remain, Discussion and Findings.
Responsibilities

This first section provides context for the ways in which HTLs’ current responsibilities align in the data with the factors and expectations they reported influenced them to serve in dual roles. Despite differences in the data between sites and roles, all eight HTLs were serving in leadership posts whose functions aligned in some way with Domains I-V of the TLMS (TLEC, 2012). Furthermore, all positions were deemed teacher leadership positions by participants in both settings. Yet, the data reveal that the responsibilities formal HTL positions in these settings actually extend beyond the functions of the TLMS, are quite varied and loosely defined. TLs at MVHS and the DH at CHHS reported a comparable set of responsibilities focused on the particular department or content area under the TL or DH’s purview. For example, both the DH and TLs create or manage a department budget, distribute and maintain inventories of textbooks, disseminate information, create teachers’ class schedules, and inform student course placement. SLCCs’ additional duties differed most widely from these other HTL positions. Described as “mini-principals,” SLCCs reported some distinct responsibilities, including implementing student discipline policies, managing the overall academic climate, and program recruitment or fundraising. The SLCC position seems to have a broader, multi-disciplinary purview, as well. It also seems to be more closely tied to the student experience than that of the DH and TLs whose responsibilities seem to align primarily with faculty.

Each job description included language that accounts for what HTLs report is an ever-changing and increasing set of responsibilities. To quote from these documents, HTL participants’ “specific tasks may vary” and they may be asked to “perform other duties as deemed necessary.” This language may account for what participants’ suggest to be a set of loosely defined roles for HTLs. Participants in both settings, however, reported two diverging categories of positional priorities: managerial duties and instruction-related activities. Participant language seemed to differentiate these obligations according to level of importance. To illustrate, in both settings HTLs fulfilled responsibilities connected to organizational management, such as budgeting, program
recruitment, attending administrative meetings, and allocating resources. These duties were described as “bureaucracy” or “paper,” what Elizabeth deemed “the normal teacher leader stuff.” This language suggests that participants see these duties as less important, although perhaps more predictable or regular (e.g., “bureaucracy,” “normal”).

On the other hand, each of the HTLs participants reported having instruction-related responsibilities that their language suggests are of greater importance to them than managerial duties. To quote Justin, both SLCCs and DHs are about “instruction and curriculum,” even though their responsibilities may differ in scope and purview from singular department curriculum and state mandates to program-wide instructional practices and national tests, respectively. Similarly, the TLs in MVHS reported duties connected to student performance data analysis and interpretation, the facilitation of, and design or revision of curriculum and assessments: what some HTLs called “subjective” or “human relations” elements of the position that “we do because we are leaders.” Whether managerial or instructional, the ill-defined, changing, and increasing duties of these HTLs have implications for interpreting participants’ descriptions of their leadership responsibilities. Moreover, the data reveal that HTLs’ desires or expectations for these positions do not necessarily match their realities within them: findings that have implications for interpreting HTLs’ experiences in their formal positions and reported influences on their decisions to remain in these roles.

The next section examines themes of influences HTLs reported as factors in their decisions to take on these leadership positions. It also examines how HTLs’ descriptions of their motivations align with the study’s conceptual framework positioning HTLs as boundary spanners. It is further divided into the following subsections: HTL as Boundary Identity and HTL as Boundary Crosser.

**Influences to Serve**

HTLs’ reported experiences in these roles are often those of organizational managers and sometimes instructional leaders, whose positions appear to get them closer to the
opportunities implied in their job descriptions, but the ever-increasing and changing responsibilities they fulfill appear to move them farther away from realizing their expectations for these roles. The study explored these expectations as part of an investigation into what these HTLs report as influences on their decisions to take on hybrid leadership roles. The data show that these HTLs came to these roles as change agents, wanting their positions to be “platforms” or “forums” for instructional, teacher, or student advocacy. To quote, Justin: “I had all kinds of ideas, and . . . I was like, I need a forum. . . . It was very intentional.”

The study’s conceptual framework (see Figure 1) hypothesized that teacher agency, acquired through pedagogical consolidation or expertise, catalyzes a teachers’ desires to diversify roles through opportunities for professional activism, extending their reach beyond the classroom toward broader engagement in the school, district, or beyond. Accordingly, the conceptual framework proposed that teacher leadership is part of a boundary identity trajectory in which individuals find “value in spanning boundaries and linking communities of practice,” using membership in these communities to influence learning or change (Wenger, 1998, p. 154). I discovered patterns in the data that suggest the HTL participants in these settings sought their leadership positions in ways consistent with this explanation.

**HTL as boundary identity.** HTL participants cited multiple forms of the acquisition of agency as an influential factor on their decisions to serve in leadership positions. Some HTLs acquired the desire to extend their influence because of growing confidence in pedagogical skills. These teachers saw HTL positions as opportunities for leadership influencing instruction and curriculum. Stacey, for example, reported that even though it may sound like “a little bit of ego,” she felt as though she had “more to offer.” She had overcome teaching obstacles early in her own career to gain a sense of greater confidence, and at one point felt as though “[she] could have more impact” because she was “getting good results in the classroom.” Elizabeth similarly felt she might sound “arrogant,” but also reported that her hybrid position was a way to share with others what she knew of recent standards changes and what made her successful in her own practice. *Mastery experiences* (Bandura, 1994) in their classrooms seem to have brought feelings of
competence, and thereby agency. For individuals such as Stacey and Elizabeth the formal position is ideally for effecting change in other classrooms, a way to fulfill desires to make a difference through instructional improvement.

Even if they did not originally perceive themselves in this way, other HTLs, such as Jarred, Angela, and Karen were influenced to take on HTL roles by others, such as principals or superintendents who recognized the HTLs’ classroom knowledge and skills, but also their potential for leadership (or sometimes both). In fact, all of the HTLs reported influential individuals who validated not only their teaching skills, but also their potential for leadership. Other influential individuals provided exemplars of great teaching or leadership, what Bandura (1994) calls modeling influences. These cooperating teachers, mentors, department heads, or school leaders inspired these HTLs to make change outside their own classrooms, and in many cases opened opportunities for these HTLs to lead change successfully prior to their current positions. In fact, three of the eight HTLs came to their positions in ways Smylie et al. (2003) would call “anoint and appoint” practices: building or administrative leaders in their settings approached them directly offering the role or simply placing them in these positions because of perceived knowledge or skills. For example, Jarred described how his superintendent gave him an opportunity for early success in leading renovation efforts in his department and later approached him about taking the position that eventually became his current one.

Furthermore, the data suggest particular goals compelled these HTLs to move into formal hybrid positions: to “see education get better,” to provide “students the right setting,” “to advocate for families,” “to shape student destinies”—“to make a difference.” And so for many of the HTLs, instructional or leadership mastery experiences and school-based modeling influences inspired agency to lead. These data are consistent with what Huberman (1993) suggests are diversification motives within the teaching career trajectory, potentially inspired by “activist desires” to become change agents, extending their influence and reach beyond their own classroom (Sikes, 1985, as cited in Huberman, 1993, p. 7). As a result, these teachers turned teacher leaders now occupy a middle space where teacher leadership emerges as the agency to
advocate: for curriculum improvements, for teachers, for students and families. However, the data also suggest HTLs discover this identity trajectory requires the negotiation of two layers of contextual rigidities: local and institutional. The result is an in-between space where unfulfilled expectations, tension and complexity reside. It is a middle space in which these HTLs must boundary cross between what Karen called “a rock and a hard place.”

This idea of boundary crossing or Wenger’s (1998) theory of brokering proved useful in interpreting how the HTLs in these settings not only described themselves, but also their leadership, as well as the challenges they faced in these roles. All of the HTLs spoke of themselves as “in the middle” based on the unique ways in which they go about negotiating their unique positioning—at one teacher, but also HTL with responsibilities and desires for leadership. Now some participants, like Justin suggested: “We understand that the role comes with some natural middle tendencies.” However, whether they expected it or not, all of the HTLs made clear that their “middle positioning” is inherently challenging and requires constant pushing and pulling, between and against, and sometimes within these boundaries to achieve what they originally desired for their positions. To define teacher leadership in these contexts is to enact boundary crossing.

I use the framework of boundary crossing or spanning to orient the analysis that follows in each of the remaining sections. Therefore, I first provide a brief overview of these terms and concepts.

**HTL as boundary crosser.** In the literature, boundary crossing or boundary spanning are terms used to describe continuities or connections between two sites or contexts. These connections can take several forms, including individuals who link the practices of these contexts (Akkerman & Bakker, 2011; Cobb & McClain, 2006; Wenger, 1998). Wenger (1998) asserts that individuals within a boundary identity trajectory span boundaries by connecting or linking communities of practice (COP), introducing elements of one into another (p. 109). These boundary crossers or agents Wenger calls brokers. He further stipulates that what makes brokers capable of such linkages is that they “press into service” their experience of multi-membership in
each community in order to influence those to which they belong toward learning. According to Wenger, boundary agents employ the following brokering processes to make participative connections between groups: *translation, coordination, and alignment of perspectives, mobilizing attention* and *addressing conflicting interests* (p. 109). In order to be able to make such links, Wenger further stipulates that brokers must have “the legitimacy to influence” as they engage in import and export. They aid in the exchange of practice because as individuals with experience in both communities they can help to negotiate meaning (p. 109). These conceptualizations of boundary crossing are consistent with definitions of teacher leadership in the literature that report teacher leaders “accomplish their work” as “boundary spanners and networkers who work within and across school boundaries and structures to establish networks among peers and within communities” (Acker-Hocevar and Touchton, 2011, pp. 240, 261). Therefore, Wenger’s theory provides an appropriate background for the analysis that follows.

As the HTLs described who they are and what they do in these roles, they used words such as “nexus,” “mediator,” and “bridge” (see Table 5) to describe a sense of being “the middle man.” The processes they used to describe enacting this role suggested continuities and connections of influence between groups. Furthermore, the data revealed these two groups were most often teachers and administrators, as shown in Figure 2.

![Diagram](image_url)

*Figure 2. Directionality of Hybrid Teacher Leader role of Middle Man.*
Table 5

Participant Language Describing Hybrid Teacher Leaders as Middle Men

<table>
<thead>
<tr>
<th>Middle Man Role Identifiers (Nouns)</th>
<th>Associated Processes (Verbs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Middle man&quot;/ &quot;in the middle&quot;</td>
<td>&quot;Negotiate&quot;</td>
</tr>
<tr>
<td>&quot;Bridge&quot;</td>
<td>&quot;Facilitate&quot;</td>
</tr>
<tr>
<td>&quot;Mediator&quot;</td>
<td>&quot;Mediate&quot;</td>
</tr>
<tr>
<td>&quot;Liaison&quot;</td>
<td>&quot;Balance&quot; [needs of department and administration]</td>
</tr>
<tr>
<td>&quot;Nexus&quot;</td>
<td>&quot;Walk [or &quot;straddle&quot;] that [&quot;fine&quot;] line&quot;</td>
</tr>
<tr>
<td>&quot;Advocate&quot;</td>
<td>&quot;Have those conversations&quot;/&quot;side bar&quot;</td>
</tr>
</tbody>
</table>

Note. Quoted language may have been used by multiple participants from various positions.

Akkerman and Bakker (2011) in their review of boundary crossing literature found similarities in how studies conceptualized boundaries as in between two or more sites. Wenger (1998) describes these sites as communities of practice that share essential characterizing dimensions, that if met, constitute membership. The ways in which all of the HTLs across sites described this positioning as a challenge suggested that this role was actually a critical intersection between all of their other roles as a result of their membership in two groups: teachers and administrator or building leadership.

The conceptual framework hypothesized this middle positioning as a distinct box, one with a permeable border on all sides and a linear trajectory out of teacher into teacher leader (see Figure 1); however, the data suggest the borders around the space these HTLs step into as part of their formal positions are more rigid boundaries and overlap with those on either side. Beijaard et al. (2004) found that teacher professional identity is actually composed of a collection of sub-identities related to the different contexts and relationships that teachers develop within their work. The original framework did not account for how teacher, teacher leader, and leader sub-identities intersect in the space HTLs occupy as boundary spanners who must negotiate and reconcile multiple borders or memberships in the communities of practice they are meant to connect (Wenger, 1998). It is this framework that provides basis for interpreting the distinct challenges and processes connected to HTL positions in the data.
Experiences and Descriptions of Dual Roles

This next section explores HTLs’ within school membership in both teacher and administrative or building leadership communities and the enabling and constraining factors related to belonging to both groups at varying levels of inclusion. The section is divided into the following subsections: HTL as Teacher and Union Member and HTL as “Peripheral” Leader.

HTL as teacher and union member. The data show that HTLs in these settings work within a local teacher boundary that surrounds their within school content area departments or academic programs—the instructional practice communities that these HTLs are assigned to lead. As Wenger (1998) stipulates a community of practice is defined by:

1. joint enterprise: negotiated response to and definition of shared situations;
2. mutual engagement: contribution to the work that comprises the community; and
3. shared repertoire: ways of doing or thinking, the routines and rituals that are developed through community interactions.

The data show HTLs are members of these practice communities. For example, they report working with their faculty to negotiate responses to current budget cuts, administrative mandates, or changes in content area standards. Because the HTLs are responsible for partial or full course loads, they also are mutually engaged in creating and administering common assessments and designing student preparation activities for the same state or national exams, for example. During shadowing visits I witnessed shared repertoire in these practice communities, as HTLs and their faculty employed content area or program jargon, as well as observed rituals for the use of shared resources (i.e., copy machines and printers) and distinct routines for beginning and ending joint meetings.

Moving from teacher to HTL, however, did not mean moving out of these instructional practice communities. Rather, the data show HTLs still see themselves at what Wenger (1998) might terms the core of membership in these communities. HTLs revealed this perception in responses such as: “I’m a [CTE] teacher,” and “as a science teacher . . . I’m the voice for
science.” Participant reports also included declarative statements of their inclusion, for example: “I’m a teacher;” “We are all equal;” and “We’re still one of you.”

These former statements, when included with others in the data, revealed that HTLs in these settings also see themselves as members of a larger, teacher community: “I’m union, just like them;” and “I’m a fellow union member.” Beauchamp and Thomas (2009) assert that teachers’ identities are both a process in and product of “given contexts” (p. 177). As part of unionized public school systems, these HTLs identified themselves within the boundaries of this institutional context, as well—and not merely by name or “bureaucratic inclusion” alone (Wenger, 1998). All of the HTLs explicitly defined a clear boundary for their participation in this community. They cited what Wenger (1998) calls a “rule of membership.” In the data, this rule could be summarized informally as: I can’t tell another teacher [fellow union member] how to teach.

HTLs reported these community memberships are enabling benefits of their positions, helping them to gain what Wenger (1998) calls “the legitimacy to influence”: a requirement of brokers or boundary spanners (p. 109). As teacher leaders within their programs or departments, they have knowledge of content, and more importantly, on the ground classroom experience as members of unionized classroom practitioner communities. As one participant described it, as a HTL who is still in the classroom: “You walk the walk, and you talk the talk.” A teacher in CHHS reported that the HTLs in his building “[understand] what's going on in the classroom,” saying: “they know us and the students.” These relationships make it easier for HTLs to fill their responsibilities. For example, as on HTL reported: “they [teachers] have to think of us as one of them. When they don't think of us as one of them it's harder for them to buy in to what we're asking.”

The data also revealed that HTLs saw their union membership as providing an “implicit trust,” an important relationship-building ingredient for these HTLs. The union rule of membership means colleagues know HTLs are “not going to sell them out” to administration or be “somebody that is going to criticize,” as reported by participants. It is within these very same boundaries where the HTLs reported wanting to focus their advocacy for improved instruction, curriculum, or
student experiences, hence taking on formal hybrid roles in the first place. So now, as part of their formal positions HTLs must navigate within what Wenger (1998) deems the local-global interplay of their teacher community boundaries, utilizing their knowledge and experience of the classroom to improve instruction while at the same time not violating the rule of membership that enables them to influence colleagues—“teachers don’t tell other teachers [union members] what to do.”

The HTLs’ responses suggest they recognize these formal posts disconnect them in some way. For example, HTLs reported: “I’m more like a co-worker than an administrator. I’m not technically an administrator;” and “We are all equal. I just agreed to take on a bigger share of the responsibility.” Qualifiers in these phrases ("more like," "not technically," "just agreed") illustrate tensions between what HTLs suggest is now a separate, and yet equal positioning relative to their faculty colleagues. These individuals appear to be engaged in a reconciliation process between dual identities as teachers turned teacher leaders (Lieberman & Friedrich, 2010; Wenger, 1998).

The HTLs must now navigate the additional boundary of their building or administrative leadership communities of practice, and within this boundary “there’s certainly some influence that teacher leaders have over several things that impact teachers,” as Principal Keller suggested.

**HTL as peripheral leader.** HTLs described working within their building or administrative leadership practice communities mutually engaged in: (a) removing or assigning teachers into courses or SLC programs, (b) managing portions of a building budget, (c) dialoguing about school or district-wide improvement goals that will affect teachers’ classrooms, and (d) addressing student or administrator concerns about teachers. HTLs also reported negotiating responses to state or administrative policies with building leadership that will hold faculty accountable for student performance (e.g., SLOs and common assessments).

Accordingly, many elements of HTLs’ work are explicitly identified in the data as “administrative,” reinforcing the HTLs’ transition into what Barth (2001) deems a pseudo-administrative space. While HTLs appear to share in the responsibilities of administrative leadership, the data indicate that HTLs in these settings are not at the core of their building or administrative leadership.
communities. Because of the nature of their positions, HTLs do not hold the same kind of authority that administrators do. HTLs remain on what Wenger (1998) would term the “periphery” of their administrative communities where they have legitimate access but not the full authority of membership. Consequently, they must use other sources of influence—indirect rather than direct means to fulfill their desires and expectations for these roles as advocacy for improved curriculum, teachers and students. If they want to initiate changes within their departments or programs they must influence administration. As one HTL articulated: “We obviously have to get a final say.” And so, administrative relationships become just as important as faculty relationships. And carrying through on their responsibilities is one way the data suggest HTLs can do that. To quote an administrative role partner: “These [HTLs] are individuals in whom we have a deep seated trust.”

Accordingly, the HTLs become boundary spanners or agents who facilitate connections between teachers and administrators while trying to serve the needs and interests of both groups. They are brokers who must “manage carefully the coexistence of membership and non-membership” being “neither in nor out” (Wenger, 1998, p. 110). In their words they must “walk that fine line” or “blurred line” the data suggest is actually one of multi-membership in these communities of practice. They negotiate dual roles as teachers and leaders while attempting to maintain the legitimacy to influence. They maintain legitimacy with administration by employing their content area knowledge; “doing what’s in the best interests” of students, the department, or program; and “advocating” for the school or district. They maintain legitimacy to influence teachers through current knowledge and experience of the classroom; “doing what’s best for” the students, department, or program; and “filling the needs” of teachers and students. The data show that HTLs and their role partners used labels, such as Initiator, Implementer, and Advocate to describe not just who these HTLs are, but also what they do in these settings. These labels represent how participants are interpreting HTLs’ engagement within and between these within school boundaries.

The next section examines the ways in which HTLs in these setting interpreted working
within and against these boundaries. It also highlights the challenges they encountered in attempting to fulfill both their actual responsibilities, as well as their expectations for their roles. The section is separated into three subsections: HTL as Initiator, HTL as Implementer, and HTL as Advocate. Each subsection provides representative examples from the data that illustrate two phenomena. Some examples demonstrate ways HTLs were enabled within the boundaries of their school communities, as well as within their larger institutional contexts. These aids are conceived as continuities or possible openings in the boundaries of these communities. Other examples reveal ways HTLs were constrained within the boundaries of their school communities, as well as within their larger institutional contexts. These constraints are examined as discontinuities, and thus possible closings or reinforcements of these boundaries. Furthermore, the analysis of each HTL role theme explains how HTLs described practices that align with boundary spanning, or Wenger's (1998) brokering processes, including: translation, coordination, and alignment of perspective, as well as mobilizing attention and addressing conflicting interests.

**HTL Roles**

**HTL as Initiator.** The HTL participants and their role partners described ways in which the DH, TLs, and SLCCs serve as Initiators of change in their school contexts, including creating new courses, changing course sequences, combining or expanding programs, seeking out external learning opportunities for students or faculty, and requesting increases in instructional resources and equipment. HTLs also reported recommending shifts in teacher rosters or schedules and student placement in particular programs or courses. The SLCCs, in particular, were described as those who “set goals” for, as well as “build” and maintain the overall climate of their SLC. SLCC participants tended to use language that was distinct from the DH and the TLs when describing processes associated with the Initiator role, such as “create,” “develop,” “increase options,” and “seek out.” They also used this language in connection with what Justin called the “bigger purview” of an entire program. In contrast, TLs and the DH, rather than independently, appear mostly to facilitate changes on behalf of their faculty role partners.
However, that is not to say that SLCCs also do not seek teacher input in their roles as Initiators. And while some of the changes these HTLs describe initiating are activities for students, most action plans focus on shifts in instruction or academic programming that will initially affect teachers, but ultimately benefit students.

Despite these differences present in the data, participant language overall suggests that as Initiators, HTLs experience their roles as “representatives” in a communications relationship that flows primarily from teachers to District or school leadership, as shown in Figure 3. Consequently, HTLs in these settings use their instructional practice community memberships to influence administration on behalf of teachers, their program or department. As Initiators they must attempt to permeate the administrative leadership boundary.

![Figure 3. Directionality of Hybrid Teacher Leader role of Initiator.](image)

As I examined the participant language connected to this Initiator role across sites, I found consistent use of the following variants: “voice” (“voice of the department,” “teacher voice,” “student voice”) and “advocate.” These role identifiers appeared in the data with associated processes that could be separated into two subcategories, as shown in Table 6. The sample data in Table 6 represent how HTLs described filling this role by: (a) independently creating or discovering opportunities for change, or (b) influencing administration to enact change.
Table 6

Participant Language Describing Hybrid Teacher Leaders as Initiators and Advocates

<table>
<thead>
<tr>
<th>Initiator and Advocate Role Identifiers (Nouns)</th>
<th>Associated Processes (Verbs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Initiator” (TL, SLCC)</td>
<td>“Finding opportunities” [for students/teachers] (SLCC)</td>
</tr>
<tr>
<td>“Facilitator” (TL, SLCC)</td>
<td>“Creating” [courses/programs] (T, TL, DH, SLCC)</td>
</tr>
<tr>
<td>“Liaison” (TL, DH)</td>
<td>“Getting answers” and “permission” (TL)</td>
</tr>
<tr>
<td>“Facilitator” (TL, SLCC)</td>
<td>“Facilitate” (TL, DH, SLCC)</td>
</tr>
<tr>
<td>“Voice”/“Advocate” (TL, DH, SLCC)</td>
<td>“Make recommendations [to administration]” (TL, SLCC, DH)</td>
</tr>
<tr>
<td>“Representative” (TL)</td>
<td>“Present...and try to influence [administration]” (TL, DH)</td>
</tr>
<tr>
<td></td>
<td>“Have a little bit of say...influence” (SLCC, DH)</td>
</tr>
<tr>
<td></td>
<td>“Manipulate the system, not to cheat, but to do what’s best for kids” (TL)</td>
</tr>
</tbody>
</table>

Note. After quotations taken from the data, the participants’ positions are indicated in parentheses. Quoted language may have been used by multiple participants from various positions. TL = Teacher Leader; DH = Department Head; SLCC = Small Learning Community Coordinator; T = Teacher.

In the role of Initiator, all of the HTLs were posed as change agents, at least in part. All of the participating HTLs described themselves as “advocates,” and every role partner participant similarly identified the HTLs in this way, no matter the position. Initially, I had thought the roles of Initiator and Advocate were completely distinct in participant reports; however, within this role category the two overlapped. Therefore, drawing from Wenger (1998), I examined how when fulfilling this role the actual practices of HTLs may be influencing the equivocal identifications of the HTLs in these settings as simultaneous Initiators and Advocates: identity and practice as reflections of each other.

As I examined the data for distinctions between Initiator and Advocate, I found indications that the first subcategory of processes is employed most often in reference to department- or program-wide decisions that have come out of discussion and collaboration with role partners, teachers in particular. But, the HTL is without the positional authority vis-à-vis administration to
advance such changes independently. As a result, the second subcategory of processes seems to become necessary for HTLs to convince administration of the initiative’s worth or value. Consequently, as Initiators, HTLs work within their leadership communities’ “peripheries” to translate ideas and action plans on behalf of the teachers and students they serve, a brokering process of coordination of perspectives (Wenger, 1998). Consistent with conceptualizations of teacher leadership in the literature, HTLs then become influencers (Curtis, 2013; IEL, 2008, Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004). In their words, they “make recommendations” or “get permission” to advance department or program goals and visions.

When describing how HTLs enact their roles as Initiators, participants often employed terms that indicated collaboration or dialogue, suggesting that HTLs must first bring together or influence colleagues. One SLCC, for example, described his role by contrasting it with the DH’s role, saying: “Ours can be much more teacher input. We could really go the direction that the people have discussions and say, “What do you think?” Here, the SLCC suggests consultation with teachers is part of this Initiator role. Although, it is unclear in the data collected from SLCCs and their role partners whether or not changes these HTLs may initiate are arrived at simply in consultation or in collaboration with their SLC colleagues. Conversely, participant language included terms such as “voice” and “representative” to describe TLs and the DH. These terms suggest TLs and the DH serve more as delegates of their instructional practice communities who advance collaborative teacher decisions about programmatic initiatives. In both descriptions, however, I hear reference to how teachers potentially gain agency in these settings through HTLs who, while they do not have administrative authority, do have formal posts that provide avenues for influencing administration.

At first, I had thought participants were suggesting HTLs in their capacities as Initiators serve as organizers of collective agency, which Bandura (2000) asserts is “enacted when people who share common beliefs act as a group to produce effects by collective action” (pp. 75-76, as cited in Weibell, 2011, para. 11). Throughout descriptions in this role category participants use language that implies collective decision-making. For example, one teacher role partner
described his TLs leading in this way: “The decision to move [a course] to 9th grade has been discussed and . . . how we can best handle that move. . . . It's a group effort . . . [led] through the teacher leader, and then they take that combined effort, present it to the principal.”

However, much of the descriptions of how HTLs fulfill their roles as Initiators refer to ways in which they act for the group as representatives, not with the group or independently as a leader to cause change. Even if the HTLs are the individuals who facilitate teacher collaboration around change, they appear to become delegates or boundary agents who advance initiatives within their building or administrative leadership communities on behalf of teachers. Therefore, these HTLs appear to be providing more proxy agency: “the indirect influence a person can exert on circumstances beyond their immediate control, by acting through others . . . who have the resources, knowledge, and means to act on their behalf” (Bandura, 2009a, p. 8, as cited in Weibell, 2011, para. 9-10). If participants see HTLs in these settings as proxies for teacher agency, that perception could explain why participants describe HTLs’ “initiation” so often in terms of advocacy—an acting for teachers or students. By nature of the formal positions they hold which link them to administration, HTLs can mobilize attention to needed changes within their teacher communities. This form of agency is consistent with Wenger’s (1998) definition of brokering.

Both collective and proxy forms of agency evoke definitions of teacher leadership in the literature that emphasize influence, adult collaboration, and access to decision-making (Camburn, 2009; Curtis, 2013; Danielson, 2007; IEL, 2008; Muijs & Harris, 2007; TLEC, 2012; York-Barr & Duke, 2004). However, newer conceptions of teacher leadership in the literature reveal a move away from classifying teacher leadership solely as formally appointed positions or roles, accounting for more informal teacher leadership that develops spontaneously as a form of shared influence by groups of teachers (Danielson, 2007; IEL, 2008; Muijs & Harris, 2007; Smylie et al., 2003). Therefore, these newer conceptions evoke an image of teacher leadership that is enacted in ways more consistent with collective agency. The first part of York-Barr and Duke’s (2004) definition of teacher leadership also evokes this kind of group influence: “the process by which
teachers individually or collectively influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement” (p. 288).

As potential proxy agents, HTLs who hold formal positions in these school sites fit within the scope of York-Barr and Duke’s (2004) definition which includes individual influence. However, the way in which these HTLs described initiating change on behalf of their teacher communities also aligns with conceptualizations of these HTLs as boundary agents (Wenger, 1998), and therefore suggests a lacuna in the former definition: the process by which the individual in a specific role influences on behalf of, or as representative of the collective. This process of representative influence would account for how the proxy must first bring teachers together around shared visions. It would also account for circumstances when the boundary agent’s perspectives both converge and diverge from those of the collective, a risk of these kinds of community connections, according to Wenger (1998): one-on-one boundary encounters are often subject to the proclivity of the messenger. Because these HTLs become influencers in their Initiator capacities, HTLs’ agreement with or ability to build consensus for the collective teacher decision may affect how they enact this role on behalf of their instructional practice communities. Thus, representative influence or brokered influence becomes important in future operationalization of investigations into teacher leadership practice through formal hybrid roles.

**Continuities.** HTL Initiators report that they were given flexibility or autonomy when working within the administrative periphery, in particular SLCCs who instituted program-wide change. Such flexibility enabled them to be able to advance goals for improving their programs and students’ experiences. As Angela reported, she was surprised by “the amount of autonomy [she] has.”

In another example, Justin described how he was able to work with a fellow SLCC to convince administration to let them combine two smaller academic programs so they both could thrive by utilizing shared resources and creating more course options for students. Justin said the ability to enact these kinds of ideas brought him to the position in the first place. Karen similarly
reported that in working with her principal, “[she] got to create this thing,” referring to her SLC program and the ways in which it has grown over the years to include other certification areas and to improve student performance on national industry performance measures. However, the data suggest that when HTLs serve as Initiators, even with autonomy, the role requires persistence. A pattern in participant responses suggests how HTLs are able to fill their roles as Initiators. Enabling attributes, such as “outspokenness” or forthrightness, seem necessary when HTLs are attempting to initiate change in their settings. Other words and phrases, such as “push the boundaries” and “take the bull by the horns” suggest HTLs may encounter what Wenger (1998) calls a discontinuity or rigidity on this administrative periphery.

**Discontinuities.** These reports of the ability to initiate change were coupled with at least three challenges HTLs faced within the boundaries of their teacher communities in making change. The first difficulty is connected to influencing consensus or collective movement toward change. While they may have had administrative autonomy to move goals forward in some ways, as potential proxy agents, they also had to influence teachers. In particular, the data reveal that the HTLs’ Initiator role is complicated when the changes being advanced are those connected to instruction.

To illustrate, participant language and the listed responsibilities for these positions suggest that instructional leadership is a central part of these roles. HTL and administrator participants in each setting employed the language of leadership in some way when describing these duties, even though HTLs’ instruction-related responsibilities may differ in scope and purview. Administrators in both settings specifically referenced HTLs’ capacities, such as sharing best practices or “improving the overall academic climate” as core to these positions. HTLs at CHHS, for example, reported visiting classrooms as part of their duties during daily release time. However, in many cases, HTL participants reported serving fellow teachers more as informal, rather than formal mentors and sources of feedback on instruction, as Desimone et al. (2014) employ the terms. The difference is that these HTLs are not seen by teachers or may not see themselves as assigned to fill this capacity. Rather, colleagues seek the HTL for support.
organically. And yet, all of the HTL participants expressed desires for instructional leadership to be more a formal and featured element of their posts than it is currently. They cite multiple challenges to realizing this desire. Some are structural obstacles, such as a lack of time for collaboration with faculty. Another challenge making these changes a reality is the complex brokering processes that must take place within the boundaries of HTLs’ teacher communities while they simultaneously fill leadership responsibilities outside those boundaries.

Justin, for example, said “there is a team approach.” He must “build unity” and trust within his SLC. He noted his predecessor was more about student discipline than instructional change. As Initiator in this example, Justin reported being “still in the fight for [his] life” to bring all of his teachers together. On multiple monthly seminar reports to her administration, Stacey described her desires to be “doing more of a lesson study” with her department colleagues. Yet in the interview, she lamented that there is not the level of collaboration she would like to see among her faculty. When she took on this position for the second time, she thought there would be more “support and camaraderie.” Stacey said she struggles to be the “motivational speaker” who might inspire her faculty toward improvement. Justin and Shannon described autonomy as a double-edged sword of their Initiator roles. Without administration communicating with faculty about HTLs’ roles in setting instructional improvement goals, the HTLs are left to move teachers together themselves. This challenge could explain why several HTLs report becoming more informal sources of instructional support for some, rather than leaders of instructional improvement for all.

The second challenge HTLs faced within the boundaries of their teacher communities is connected to the formality of their positions. HTLs take on contracted responsibilities as part of an administrative or building leadership community of practice. This school leadership community membership distances them from the rules of teacher membership: “teachers don’t tell other teachers [union members] what to do.” Their union affiliation, classroom experience and knowledge might enable HTLs to gain the trust and legitimacy required to lead within teacher communities, but HTLs’ association with administration potentially damages those same
relationships. As one administrator put it, “taking on a different role,” comes with the “stigma that HTLs are tight with administration” which “some [teachers] would look at . . . as ‘you’re telling me what to do.’” This association complicates how HTLs must go about initiating instructional changes. These HTLs are charged with responsibilities that require them to transcend the boundaries of teacher community memberships in order to serve the best interests of students, the department, or program through instructional improvements. Stacey, Jarred, and Elizabeth provide examples of this kind of instructional leadership boundary spanning.

Stacey described observing a “trend” in student data she felt indicated an area for improvement in colleagues’ instruction. In trying to handle the situation as a HTL, she stipulated: “I can’t go to those teachers as a teacher also and say, ‘You need to be doing this and look at what’s happening to the data.’” The other HTLs confirmed her perceived inability to do so, implying the boundary they must negotiate in order to make change or improvement. This and other examples in the data suggest these HTLs must translate and support visions of effective instruction and student achievement, mobilizing attention to the issue without damaging teacher trust (Wenger, 1998). They described using tactics, such as: “making recommendations,” “[guiding]” or “suggesting” changes in practice to the teacher, or privately alerting administration through “hypothetical” or “generic” conversations. To do nothing could potentially hinder what Assistant Principal Jones called the “deep-seated trust” and legitimacy HTLs need from their building or administrative communities in order to influence other changes on behalf of their departments and programs.

The teacher leadership literature asserts collaboration is the “main way teacher leaders impact other teachers,” and thereby instructional practices (LeBlanc & Shelton, 1997, p. 8). Yet, researchers argue that powerful cultural norms of non-interference within the teaching ranks make colleagues a teacher leader’s greatest challenge (Barth, 2001; Little, 2003; Smylie et al., 2003). A conceptualization of HTLs’ leadership as boundary crossing provides a way to interpret this constraint as the negotiation of multi-membership—a brokering process requiring skill at coordination and alignment of administrative and instructional practice community perspectives of
A third challenge HTLs reported in the Initiator role, particularly connected to their desires for instructional leadership, was an increasing set of responsibilities associated with their membership in their within school leadership communities. York-Barr and Duke (2004) assert that teacher leadership is most often used as an “umbrella term” to describe a “wide variety of work at multiple levels in the educational system” (p. 260). The HTL positions included in this study evoke this description. These roles cover an array of responsibilities ranging from instruction-related activities, managerial duties, and grant writing, to program recruitment, resource distribution, student discipline, and family outreach. Furthermore, the job descriptions for each of these positions, while more specific in some cases (DH and SLCC) than in others (TLs), provide for the expansion of this “umbrella.” Each job description included language that accounts for what HTLs report is an ever-changing and increasing set of responsibilities.

HTLs in both settings expressed frustration with what they suggested is less an “umbrella” and more a bucket of responsibilities that is filled according to administrative prerogative. Jarred’s description suggests his TL position is a catch-all: “anything administration wants you to do.” Angela claims, “I often feel like my role is beck and call girl.” Barth (2001) and others point to role ambiguity as a constraint on teacher leadership in schools, suggesting that loose definitions lead to increasingly more managerial or administrative labor (Little, 2003; York-Barr & Duke, 2004). Furthermore, as Rousmaniere (2013) argues, the principal has become an “administrator in the middle of an educational bureaucracy and not an educator in the middle of the school house” because of increasing state federal, and local demands (para. 9). As Danielson (2007) suggests, a principal “can’t do it all” (p. 15). The HTLs’ ever-increasing bucket of responsibilities may be representative of an overflow of administrative responsibilities as these school settings attempt to manage and distribute these many demands. The open-ended statements in the job descriptions appear to provide flexibility, allowing the schools’ leadership responsibilities to be spread fluidly with changing demands “stretching leadership” over multiple people in the organization (Spillane, 2005). But rather than a distribution of what the HTLs termed
leadership in their descriptions of responsibilities, the less important “clerical” work—the shared repertoire of administrative membership the HTLs deemed necessary—takes over instruction-related priorities.

Consequently, the HTLs report being caught between two competing sets of responsibilities. Stacey expressed this clearly in a portion of her interview. She described how these duties often take “priority within department stuff” over what she sees as “the more important stuff,” namely working collaboratively with her department faculty on improving lessons. Therefore, the kinds of responsibilities that overflow from building administration to HTLs in these settings have implications for how HTLs negotiate their dual roles, in particular while managing an increasing number of administrative directives or policy mandates connected to these positions—yet another role HTLs reported serving as detailed in the next subsection.

To summarize, this subsection analyzed ways HTL participants described themselves and what they do as Initiators of program and instructional improvements. It explored examples of how flexibility or autonomy within the administrative periphery enabled some HTLs to enact change. It also explored the challenges or hurdles participants encountered in working within and beyond their teacher communities of practice in order to mobilize attention to possibilities for change and instructional improvement. The next subsection explores how some HTL participants described themselves as Implementers within and between their teacher and leadership communities, as well as within their larger institutional contexts as public systems working under state school accountability policies.

**HTL as Implementer.** The TLs and the DH, in particular, consistently described themselves and were described by their role partners as Implementers of district-initiated changes or state-driven policies associated with accountability measures, for example SLOs (a part of the teacher evaluation system in both settings), common assessments, and corresponding student performance data tied to SLOs. The TLs and DH were described as “bureaucrats,” “messengers,” and “diplomats.” The role of Implementer distinguished TLs and the DH from SLCCs, for the most part. However, there were two SLCCs, Karen and Shannon, who similarly
described themselves in this way due to their oversight of specialized content area programs. These two SLCCs appear to serve as quasi-department heads in connection with their SLCs’ unique curricula and student populations. They are similarly charged with facilitating their faculty’s completion of required instruction-related accountability activities. Other SLCCs also spoke of following building administrative directives but reported not being as “burdened” as DHs in this respect.

The data suggest that these HTLs are often Implementers in the center of communications relationships that flow from administration to teachers (see Figure 4). In this role they employ three subcategories of processes: (a) information dissemination, (b) translation or persuasion, and (c) alignment or adjustment, respectively. Table 7 provides sample responses from interviews that illustrate the connections between descriptions of these processes and how the DH, TLs, and two SLCCs, in particular, were identified when acting on behalf of their administrative leadership communities. The degree to which these HTLs get to participate in decisions seems to influence both the way they describe their practice and how they identify themselves as leaders.

Figure 4. Directionality of Hybrid Teacher Leader Role as Implementer.

The first category of responses poses the HTLs as conduits for administrative communications without exercising any influence on the dispatch. They are “messengers” who “gather” from administration and “bring back to” teachers. These identifiers seem consistent with participants’ reports of HTLs mainly fulfilling organizational management responsibilities. Additionally, these descriptions are connected in the data to participant reports of HTLs sometimes feeling “dumped on” rather than included where possible in administrative decision-making. Therefore, these descriptions suggest circumstances when TLs and DHs, especially, move even farther from the core of administrative leadership community participation and
become more “messengers” facilitating teacher compliance than leaders facilitating changes in instructional practice.

Table 7

Participant Language Describing Hybrid Teacher Leaders as Implementers

<table>
<thead>
<tr>
<th>Implementer Role Identifiers (Nouns)</th>
<th>Associated Processes (Verbs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Secretary” (TL)</td>
<td>“Take from [administration]…bring back to [teachers]” (TL/ADMIN)</td>
</tr>
<tr>
<td>“Messenger” (TL/T)</td>
<td>“Give [information]…gather [questions]” (T)</td>
</tr>
<tr>
<td>“Disseminator” (TL)</td>
<td>“Deliver” (DH/TL/ADMIN)</td>
</tr>
<tr>
<td>“Bureaucrat” (T about DH)</td>
<td>“Make sure…specific teachers complete” (T)</td>
</tr>
<tr>
<td>“Facilitator” (TL/DH)</td>
<td>“Facilitate” (DH/TL, ADMIN of TL)</td>
</tr>
<tr>
<td>“Liaison” (T about/and TL)</td>
<td>“Interpret” (TL)</td>
</tr>
<tr>
<td>“Agents of District” (TL)</td>
<td>“Explain” (SLCC/ ADMIN of TL)</td>
</tr>
<tr>
<td>“Diplomat” (DH)</td>
<td>“Justify rationale [to teachers]” (ADMIN)</td>
</tr>
<tr>
<td>“Advocate” (ADMIN)</td>
<td>“Get buy-in [from teachers]”</td>
</tr>
<tr>
<td>“Implementer” (DH/ADMIN of TL)</td>
<td>“Carry out when suggested by [TLs]” (T)</td>
</tr>
<tr>
<td></td>
<td>“Make a case for” (ADMIN)</td>
</tr>
<tr>
<td></td>
<td>“Have sidebar conversations” (TL)</td>
</tr>
<tr>
<td></td>
<td>“Tweak” (DH)</td>
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<tr>
<td></td>
<td>“Shape” (TL, DH)</td>
</tr>
<tr>
<td></td>
<td>“Adapt”/”Adjust” (TL, SLCC)</td>
</tr>
<tr>
<td></td>
<td>“Make it fit” or “relevant” (TL/DH)</td>
</tr>
<tr>
<td></td>
<td>“Make it palatable” (DH)</td>
</tr>
<tr>
<td></td>
<td>“Interpret” (TL, ADMIN)</td>
</tr>
</tbody>
</table>

Note. After quotations taken from the data, the participants’ positions are indicated in parentheses. Quoted language may have been used by multiple participants from various positions. TL = Teacher Leader; DH = Department Head; SLCC = Small Learning Community Coordinator; T = Teacher; ADMIN = Administrator.

**Discontinuities.** Mark reported that “mandates coming down from the District,” such as SLOs and common assessments, “consumed” a focus on instructional improvements. This report may seem ironic. After all, these mandates are related to instruction and student learning. However, as his teacher role partner explained in the focus group interview, “there’s a tiny academic piece to that, but there was also a gigantic mechanical side that [doesn’t] have anything to do with the academic part of it.” In other words, rather than time to facilitate professional dialogue around instruction, the time spent on District and state mandates is sometimes more about compliance than instructional improvement. This challenge is further compounded by the HTLs’ positioning as boundary agents between administrative leadership and policy communities.
they are accountable to and teacher communities who may feel threatened by or resist the directive. So it is up to the HTLs to negotiate the meaning and value of the directives they are asked to implement with their faculty, while simultaneously preserving the legitimacy and trust they need in order to influence their colleagues.

In another example, Stacey, Jarred, and Elizabeth reported becoming dispassionate or disengaged when provided little opportunity for input into District-initiated changes. These emotions then influenced how they enacted leadership in their roles. These HTLs described not justifying or arguing for an initiative’s value, and instead just “[getting] through it” with their teachers. As a result, these HTLs exercised the first subcategory of implementation processes in Table 7, and thus became “[secretaries]” or “[disseminators].” In these situations, HTLs are less boundary agents and more mere deliverers of boundary objects, such as SLO forms and common assessment templates. (Wenger, 1998). Wenger stipulates that these documents or artifacts that provide reification of a desired practice alone are not usually sufficient to cause learning; change requires both reification and participation. Without both, mere compliance or, what Wenger (1998) calls, “proceduralization” occurs. Therefore, as Coburn and Stein’s (2006) research confirms about successful policy implementation inside teachers’ within school communities of practice: boundary objects must be accompanied by brokers who provide a participative connection (Wenger, 1998). Because these HTLs reported not always participating in decisions on how District changes or policies would be implemented, there are implications for whether these local or even state reforms may ultimately change teacher practice, or as Jarred suggested: be “[implemented] . . . to minimum standards.”

Little (2003) asserts that in the first decade of the 21st century teacher leader roles have become a prominent part of reform agendas as “school administrators recruit teachers into [these] positions in the service of external accountability” (p. 416). Portin et al. (2009) also describe how new roles for teachers are being utilized in schools to “[communicate] particular visions of reform” (p. vi). And, participants described HTL Implementers in these settings as tied to not just internal administrative policies, but also to “external accountability,” most notably state
policy changes (e.g., SLOs as part of state teacher evaluation systems). Both schools have tied student performance on local common assessments to these evaluation measures and are using HTLs to implement these policies aimed at improving teacher, and thereby student performance. For that reason, the data suggest that these same HTLs also are positioned between their colleagues and what Coburn and Stein (2006) would deem the state policy community in enacting particular institutional reforms. HTLs in these settings are not just positioned locally within school communities; they are also positioned within a larger institutional context of public school reform and accountability, what Wenger (1998) deems a local-global interplay that influences both practice and identity. Therefore, HTLs’ self-identifications within their roles as Implementers in these contexts has implications for the how local and institutional visions of reform are enacted.

**Discontinuities.** Within the data there were also descriptions of when HTLs in their roles as Implementers worked within the peripheries of their administrative leadership communities more as brokers than messengers and provided for the negotiation of meaning around initiatives or policies for the benefit of both students and teachers. Words and phrases in the second category in Table 7, such as “justify” and “make a case for” turn HTL “messengers” into potential influencers—individuals who convince teachers of the value of these directives. Words such as “facilitate,” “interpret,” and “explain” suggest the ways these HTLs help their colleagues understand these directives, policies, or initiatives—they become boundary spanners who use brokering processes of translation (Wenger, 1998). Once again, this subcategory of practices evokes definitions in the research literature that emphasize teacher leadership as influence (Curtis, 2013; Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004).

While these definitions account for teacher leader influence on colleagues, principals, and other members of the school community, participant descriptions of HTLs as Implementers are particularly directed toward fellow department or program faculty. Accordingly, descriptions of HTLs in this role position them inside the administrative periphery becoming diplomatic agents of the District who “get buy-in” within the boundaries of their instructional practice communities. And while in earlier examples lack of participation within this periphery provided for proceduralization,
inclusion in administrative decision-making allows for the joint negotiation of meaning (Wenger, 1998). Coburn and Stein (2006) found that “in order to integrate new approaches into their practice,” communities “need the authority to negotiate meaning according to the variability of their local context” (p. 32)—what Wenger (1998) calls negotiability. Descriptions of HTLs’ practices that fit within the third subcategory in Table 7, suggest that to the extent HTL Implementers in these settings reported having “flexibility,” they may be experiencing negotiability within their content area departments or SLCs. Consequently, they appeared to have gained access to decision-making, a practice included in definitions of teacher leadership in the literature (Camburn, 2009; Feeney, 2009; Muijs & Harris, 2007; York-Barr & Duke, 2004).

For example, all of the HTLs who identified as Implementers in these settings reported they sometimes have “flexibility” in this capacity. These HTLs spoke favorably of times when they worked with building administration to make administratively-initiated changes more relevant or appropriate within their department or program contexts. Here, the data show HTLs employ the third subcategory of processes in Table 7, such as “adapt,” “make fit,” or “tweak.” As one principal explained, he expects TLs to “interpret” District visions. Mark also mentioned flexibility as an Implementer, saying: “[administrators] don’t really care how we do it, just as long as we do it and it’s relevant and fits in with instruction.” Therefore, these data suggest that at times, HTLs as Implementers in these settings are positioned as brokers within their instructional practice communities; they become translators and influencers of District or building leadership’s reform visions through inclusion in upper-level decision-making where they can help to coordinate and align these visions with unique department or program needs.

Within the data connected to particular HTLs’ roles as Implementers, I discovered intersections with yet another role HTLs fill in in these settings: Advocate. In fact, all of the HTLs described themselves and were described by all of role partner participants as serving in this capacity. But despite the consistency of the moniker, there were some key differences in participant reports of how HTLs advocate in their settings. First, I examine the patterns in the data connected to this identification. Then, I examine the similarities and difference in how HTLs
described advocating between the boundaries of their within school communities in these settings, as well as those of the larger institutional school context. These differences are explored in connection with either opportunities or challenges in navigating these boundaries.

**HTL as Advocate.** As shown in Table 8, participants described HTLs as “go to” individuals who: (a) fill the needs of (b) do what is in the best interests of, or (c) fight for the department, program (SLC), and students. But there were also occurrences in the data where HTLs were described as advocating for the school or district. In the data, HTLs utilized the first two subcategories of processes to fill student and teacher needs that were both physical (e.g., financial resources, instructional materials, course changes) and emotional (“keep teachers happy,” “what they need to feel appreciated,” “help students feel connected”). The data suggest that current experience in the classroom enabled them to be both sensitive to these needs and fill teachers’ needs in ways that would help build relationships with their faculty, thereby allowing them to implement and initiate. But the directionality of HTLs’ advocacy was hard to trace, as there were multiple differences in the data connected to HTL positions.

For example, as participants described the SLCCs, student (and family) advocacy was mentioned most often as a function of their position, while corresponding study participants designated the DH and the TLs more as teacher or department Advocates. The SLCCs also described advocating for teachers; however, more occurrences of teacher advocacy terms are associated with TLs (and their role partners) and the DH in the data. These HTL participants suggested they serve the best interests of students more indirectly by fulfilling teacher’s needs, or as Jarred described: “by keeping the teachers happy, [TL] typically makes the education process run smoother…. and that benefits society because our kids learn more.” Furthermore, role partners may have described HTLs as advocates for the school or District equating these interests or needs with those that would serve the best interests of students.

**Contextual factors.** There were at least two contextual factors that the data suggest may be influencing these differences. First, the CHHS student population in grades nine through
twelve is nearly two times the student population at MVHS. Specifically, participants in this setting cited the size of the student population as the reason for the SLCC position. For example, Assistant Principal Jones stated: “In a place this size it’s easy to feel disconnect [sic].” Justin corroborates this statement, elaborating that as a “student advocate” he “[breaks] down a big impersonal . . . super large school.” It could also be the nature of the formal position as one that extends beyond a content area focus to an entire program. Therefore, these local contextual factors may explain why SLCCs in this setting are identified more explicitly as student advocates who provide students and families with a “voice” and a “home” where agency may be compromised by overall school size. “Filling” and “addressing the needs of students” as part of the first two sub-categories of processes in Table 8 then become primary responsibilities.

Table 8

Participant Language Describing Hybrid Teacher Leaders as Advocates

<table>
<thead>
<tr>
<th>Advocate Role Identifiers (Nouns)</th>
<th>Associated Processes (Verbs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Advocate” (T, TL, DH, SLCC, ADMIN)</td>
<td>“Represent” (TL, DH)</td>
</tr>
<tr>
<td>“Go to person” (SLCC)</td>
<td>“Advocate [for program, students, families, department]” (T, TL, DH, SLCC, ADMIN)</td>
</tr>
<tr>
<td>“Politician” (TL)</td>
<td>“Have their finger on the pulse” of the department (SLCC)</td>
</tr>
<tr>
<td>“Ombudsman” (TL)</td>
<td>“Constantly having feelers out for what people need” (TL)</td>
</tr>
<tr>
<td>“Connection” (SLCC)</td>
<td>“Know what [students/teachers] need” (SLCC, TL)</td>
</tr>
<tr>
<td>“Fighter” (TL, DH)</td>
<td>“Listen [to department/teachers]” (TL/DH)</td>
</tr>
<tr>
<td>“Buffer” (TL)</td>
<td>“Be there for [teachers]” (SLCC, TL, DH)</td>
</tr>
<tr>
<td>“Shield” (TL)</td>
<td>“Getting the teachers together” (SLCC)</td>
</tr>
<tr>
<td>“Filter” (TL, SLCC)</td>
<td>“Address the needs of” students/teachers (TL, SLCC)</td>
</tr>
<tr>
<td></td>
<td>“Fill the needs of” students/teachers (TL, DH, SLCC)</td>
</tr>
<tr>
<td></td>
<td>“Assist teachers with whatever they need” (SLCC)</td>
</tr>
<tr>
<td></td>
<td>“Empower” others in department (TL, SLCC)</td>
</tr>
<tr>
<td>“Fight for my teachers/department” (SLCC, TL, DH)</td>
<td>“Fight for my teachers/department” (SLCC, TL, DH)</td>
</tr>
<tr>
<td></td>
<td>“Take the battle on” (TL)</td>
</tr>
<tr>
<td></td>
<td>“Sticking up for [teachers]” (TL)</td>
</tr>
<tr>
<td></td>
<td>“Filter” (TL, SLCC)</td>
</tr>
<tr>
<td></td>
<td>“Mitigate” (TL)</td>
</tr>
<tr>
<td></td>
<td>“Leave out” (SLCC)</td>
</tr>
</tbody>
</table>

Note. After quotations taken from the data, the participants’ positions are indicated in parentheses. Quoted language may have been used by multiple participants from various positions. TL = Teacher Leader; DH = Department Head; SLCC = Small Learning Community Coordinator; T = Teacher; ADMIN = Administrator.
A second contextual factor influencing differences in the data could be connected to both local and institutional contexts. Both sites have recently experienced several changes caused by either District initiatives or challenges, as well shifts in state reform policies connected to measuring student, teacher, and school performance. Participants reported that a recent teacher shortage and significant budget cuts in CHHS, as well as several simultaneous “big ticket” administrative initiatives in MVHS have caused an intensification in teachers’ work (i.e., covering multiple additional classes). In consequence, HTLs expressed a sense of urgency about their advocacy for teachers in these situations. As one HTL reported: “I’m very aware of the teacher’s needs in terms of any problem they bring to me . . . I realize that their time is limited. . . . I’m on top of that. It’s the basic needs of any classroom teacher.” And the teachers confirmed that the HTL is the “go to person,” saying: “I know I’ll get a response” if a need should arise. But while this response is an example of processes in the first two sub-categories in Table 8, the third sub-category of HTL advocacy practices was most often directly related to HTLs serving as Implementers and suggests how these HTLs broker for teachers’ needs within the administrative periphery.

Discontinuities. The DH, TLs, and two interviewed SLCCs who serve in similar capacities have responsibilities connected to implementation of District mandates and state accountability measures. These HTLs and their role partners could be favoring teachers in some of the ways they defensively position administration in their responses due to what Trede et al. (2012) argue are the products of school reform agendas—intuitional or bureaucratic controls on teachers’ work. These HTL Implementers coupled descriptions of teacher advocacy with language of opposition, such as: “fight,” “stick up for,” “take the battle on.” But perhaps the more compelling responses as part of the final subcategory of processes in Table 8 were participant metaphors that position HTLs as physical “buffers” or “filters”: individuals who mitigate the impact of administrative directives or policies. TLs, in particular, reported having to “shield” teachers in their respective departments from elements of administrative initiatives that may cause
“frustrations and kickbacks” or that “don’t make sense for kids.” These responses included descriptions of how, when serving as Implementers, TLs and an SLCC even omit components of “administrative wants.” Jarred, for example, described how if administration wants “X, Y, Z and A, B, C,” he may only ask his department to “turn in” “X, Y, Z.” The TLs also described how they might independently do some of the work associated with these directives to or ease the burden on their faculty. As “shields” or “filters,” these HTLs become critical shapers of the ways in which these policies or initiatives are ultimately implemented. These responses suggest they could be “fighting” for the flexibility or authority to negotiate the local meaning of administratively-driven policies or initiatives in circumstances where they feel they have little or no control (Coburn & Stein, 2006; Wenger, 1998).

Beijaard et al. (2004) cite the work of Connelly and Clandin (1990; 1999) who assert that shifts in identity caused by these changing education reforms are "often accompanied by tensions and dilemmas (as cited in Beijaard et al., 2004, p. 121): teachers must sometimes negotiate the differences between reform mandates and their own ideas of what is best for students and teachers. Sachs (2001) argues that the negotiation of these dilemmas may give rise to an activist teacher identity, a conceptualization of professional identity that aligns with definitions of teacher leadership as collaborative, collegial, and intrinsically motivated to serve the welfare of the collective common good. When implementing particular policies, these HTLs describe becoming Advocates, taking on extra work or omitting elements of mandates or initiatives from outside their instructional practice communities. Accordingly, these HTLs may be describing themselves as activists motivated to protect the common good of their within school communities by pushing against institutional boundaries, as well as local administrative leadership community borders.

**Continuities.** And yet, while these examples illustrate the ways in which HTL Implementers worked within the boundaries of their instructional practice communities to advocate for, or to protect teachers, there are other examples in the data that highlight ways HTLs become student advocates by working from the administrative periphery and potentially against the teacher community boundary. In particular, the SLCCs reported that they must
“advocate for the right teachers” to become or remain a part of their programs. Each of them described responsibility for assigning or rostering teachers. The DH and TLs from MVHS also report this responsibility. However, it was the SLCCs who most explicitly referenced using this influence to affect the faculty make-up, and thereby the student classroom experience in their academic programs. Justin in particular mentioned removing a teacher from his program due to what he saw as a lack of engagement as he worked with faculty to “raise the rigor” of instruction. Karen specifically described assigning teachers in her program as an act of student advocacy, citing the “stigma” that is often attached to working with her students. She reported needing teachers who “care about these kids.”

**Continuities and discontinuities.** In these examples, HTLs demonstrate a practice that not only aligns them with their administrative leadership communities, but also distances them in a critical way from their teacher communities. Using this element of influence connected to their leadership position, HTLs could fill their roles as Advocates for students and their departments or programs. Such moves would thereby translate to advocacy for the school or District. However, re-assigning a teacher potentially compromises the relationships and trust these HTLs not only need to influence their teacher peers, but also to fulfill their roles as teacher Advocates. And despite having this influence, all of the HTLs reported that administration has the final decision on whether or not these recommendations are followed. Furthermore, this boundary crossing would be complicated in MVHS where a teacher re-assignment would mean removal merely from a course, not from the school or HTLs’ department—a practice only at the core of the administrative community. Hence, in this practice, the separation of HTLs from both the administrative leadership community and the teacher communities of practice is emphasized.

The above examples represent possibilities in each of the HTLs’ positions to push against the boundary of their teacher communities in ways that could help them realize the desires that brought them to the role: advocacy for students and teachers through the initiation of improved curriculum or instructional programs. But these same opportunities were reported as hurdles these HTLs negotiate in order to maintain legitimacy and influence within their teacher
communities, while also fulfilling leadership responsibilities as implementers and managers. “Filling the needs” of these multiple groups appears to enable HTLs. All of the HTLs correspondingly reported the necessity of trust in their roles as influencers of both instructional or administrative initiatives, as well as implementation of reform mandates. Such actions engender trust and build relationships that help to promote good will as these teacher leaders work to enact change. As Bryk (2010) argues relational trust not only helps to facilitate change, but is also a “moral resource for sustaining the hard work of local school improvement” (p. 28). Given that HTLs reported being “politicians” or “ombudsmen” in garnering resources from administration for students, or for their instructional practice communities, they may be simultaneously serving an advocacy role and ensuring that they will be enabled in filling all of their other roles and responsibilities. As Karen suggested of her position: “This is about trust.”

In the data, especially HTLs from CHHS reported a lack of support in leadership. None of the HTLs from either site reported receiving any preparation or leadership training before taking on their positions. While the HTLs at MVHS reported having access to professional development opportunities, they reported that these are usually connected to instruction, rather than leadership. There was a sense of isolation in HTLs’ descriptions of lack of leadership support, from CHHS HTLs in particular. These HTLs reported seeking teacher colleagues and each other for support. The teacher leadership literature reveals that few teachers receive within-school preparation or professional development aimed at training them for their new roles (Little, 2003, York-Barr & Duke, 2004, Sherrill, 1999, Muijs & Harris, 2007). Lack of training has been linked to teachers’ feeling increased frustration in their new leadership roles, an inability to navigate the pseudo-administrative space they occupy, and the relationship they have with the colleagues with whom they work (Barth, 2001; Muijs & Harris, 2007; York-Barr & Duke, 2004). These reports have implications for retention of HTLs in their positions.

To summarize, the data reveal ways HTLs work within the boundaries of their teacher communities and between the teacher and administrative communities. HTLs’ reports suggest they serve in formal positions that provide an avenue for them to use classroom knowledge and
experiences, as well as knowledge of what may be possible administratively in order to address
the needs of these multiple groups. HTLs may initiate the creation of a new course or student
activity, negotiate flexibility within a District mandate, or improve students’ learning or school
experience by finding ways to address weaknesses in instructional delivery or programming, or
even re-assign a teacher. Doing so, HTLs were described as Initiators, Implementers, and
Advocates.

The final section of this chapter briefly explores influences on HTLs’ decisions to remain
in hybrid leadership positions. It will be divided into the following sub-sections: Moving Out and
Moving On.

Influences to Remain

When asked about whether they would like to remain in their positions, six of the eight
interviewed participants reported wanting to stay, at least for the time being; one these HTLs
reported wanting to move into a new non-hybrid leadership position in the near future. The
remaining two HTLs had already or had applied to move out of their hybrid positions. Even
among those who expressed wanting to stay, four HTLs reported considering ‘moving on’ from
their positions because of certain challenges they face. Financial compensation was mentioned
by TLs in MVHS as an influence to remain in leadership, but to use Jarred’s words: “It’s not the
reason.” The data across sites suggests that more important motivating factors to move out, stay,
or move on are related to feelings of self-efficacy and agency in their leadership positions.

Moving out. As Bandura (1994) posits, “self-beliefs of efficacy play a key role in the
self-regulation of motivation” (B. Motivational Processes, para. 1). In four HTLs’ responses I hear
reference to what Bandura (1994) calls mastery experiences that may be influencing these HTLs’
feelings of self-efficacy in their leadership positions, and thus their motivations to move out of
their current roles. For some of these participants, it could be that mastery experiences in
leadership have caused doubt about continued efficacy in the classroom, and thereby motivations
to leave the middle positioning no longer juggling both.
Just as some HTLs reported wanting to move into their hybrid positions because of feelings of mastery in their classrooms, Shannon and Elizabeth appear to be motivated in a similar way to move out of these positions into new challenges in leadership. Shannon expressed wanting to eventually leave her SLCC position to become an assistant principal, “[feeling] as though [she] could do the job.” Elizabeth similarly expressed wanting to eventually move out of her hybrid role citing her almost twenty years of experience leading to realizations that she has more to offer; although, she expressly said she does not want to be an administrator. Justin, too, reported thoughts of eventually becoming a principal, similarly citing what appears to be a sense of self-efficacy or mastery as motivation. But for him, these also are influences to remain in his SLCC position, at least for the time being. He described his commitment to his program and to his position, saying: “It is my life.” Bandura (1994) provides a possible explanation, asserting that individuals with strong self-efficacy efficacy approach challenges with “intrinsic interest and deep engrossment” (para. 2). He is quick to say that he would not want to start over in another setting.

These HTLs suggest mastery could now be influencing a transition from boundary identity to what Wenger (1998) calls an outgoing identity trajectory. Huberman (1993) suggests that these feelings are an indication of a diversification career stage, one where the teacher, or in this case, the teacher leader looks for new challenges. He cites Cooper (1982, p. 81) who hypothesizes that some individuals in this part of the teacher career trajectory engage on a larger scale and utilize newfound skills (p. 8). Despite its challenges or tensions, boundary crossing for these individuals has brought motivations to move out of their teacher communities and potentially farther toward the core of administrative membership.

However, Angela, who had already applied for a new position, suggested that it is a lack of perceived self-efficacy (Bandura, 1994) that may be causing her desire to take another position. She reported being “torn” about where her focus should be. In her words: Angela reported: “As a [content area] teacher, there is a lot more to my grading . . . And, I definitely feel that that is something that suffers in my time management.” Bandura (1994) explains that “personal standards” are a “self-influence” on motivation (“B. Motivational Processes,” para. 4-5).
Angela could be experiencing doubts about her personal expectations for performance in the classroom, thus motivating her decision to move out of her hybrid role. In fact, many of the HTLs in this role are further challenged by a more personal negotiation—the one of membership in their own classroom communities. While they are filling the needs of many through leadership responsibilities, they are also still practicing teachers. The data reveal that all of the HTL participants struggle to balance these two sets of responsibilities. And while they all reported in some way that the students or classroom come first, they expressed feelings of inadequacy as they hold the image of who they are now as teachers with who they were as teachers. To paraphrase a response from one HTL group interview: It’s possible to be effective, but maybe not exceptional. These HTLs reported that diminished resources of time or energy require them to prioritize and balance the demands of their classrooms with those of administration, teachers, and their broader student constituencies (even for those HTLs who were given class release time). The literature supports these challenges of teacher leadership. As Little (2003) notes, “expanded responsibilities . . . result in overwork (Little, 2001; Bartlett, 2002) or what some might term “an intensification of labour,” causing stress and minimizing time and energy (p. 412). For many of these HTLs it was their success in the classroom that provided the impetus for their move from teacher to teacher leader in the first place. Hence, they came to the role with a particular teacher identity in practice. They may now be engaged in another reconciliation process between the teacher they were and the teacher they have become in leadership (Beijaard et al., 2004; Lieberman & Friedrich, 2010).

Bandura’s (1994) theories of self-efficacy and agency are also useful in examining why the other HTLs in these settings reported wanting to remain in their positions for the time being, but also talked about the possibility of moving on from their hybrid roles, relinquishing their leadership responsibilities or even leaving the profession altogether. In particular, the data suggest perceived agency or lack of agency as a motivating factor for retention.

**Moving on.** HTLs reported “weight” or influence and the ability to make change as among the benefits of their positions. For many one of the HTLs, these same reasons were why
they chose their hybrid positions. In that HTLs do not want to relinquish these benefits and desires for the role, such reasons serve as influences for these individuals to continue as HTLs in their settings. The data reveal that both of these factors may be connected to feelings of agency. For example, HTLs in CHHS, for example, reported their positions come with freedom to make local or school-based decisions that may have a more comprehensive influence on students and the system. Bandura (2009a) argues that persistence results from the belief in “power to affect changes” (p.9, as cited in Weibell, 2011, para. 12). These and other data from CHHS connected to this theme suggest that HTLs in this setting feel they have the ability to exert influence or control (e.g., “shape,” “create”) over their programs or departments potentially motivating the HTLs to continue in their positions. This connection between motivation and agency as a potential factor in HTL retention is reinforced in MVHS in a different way.

Stacey reported questioning her longevity in the role, unsure that she can affect change, saying the level of collaboration she hopes to create in her department “just hasn’t happened, yet.” These same struggles, as illustrated in previous sections, are related to the challenges of boundary crossing. To the extent Stacey feels she can continue to be successful in making changes within her department, she may be motivated to remain. Stacey reported that a difficult course schedule she is struggling to balance is another factor influencing her decision. The data indicate potential decreases in feelings of agency also may be factors in Karen’s and Mark’s decisions to remain in their roles, despite feeling they have the “freedom” to make local change. Both of these HTLs, as well as Stacey, report not wanting to “go any further” or “become administrators.” And yet, their longevity in their positions may be challenged by frustration these HTLs reported experiencing about “decisions that don’t benefit the kids.” These responses seem motivated by a lack of agency in their roles as Advocates amid institutional reforms that are often uniformed by teachers. Stacey, Mark, and Karen hold HTL positions that are responsible for helping administration to implement state accountability system measures, signs of the ways in which the teacher leadership literature suggests these roles have become “heavily weighted” in reform agendas (Little, 2003, p. 416). Jarred also mentioned that he is planning on “splitting” his
HTL position with a colleague. He cited a lack of "passion" for (which could thereby affect his ability to influence others in connection with) the responsibilities connected to state testing that come with his position. It could be that HTLs’ waning sense of agency in their positions is a response to the constraining institutional reform contexts in which they work (Sachs, 2001; Trede et al., 2012). As Bandura (2009a) reinforces, “unless people believe they can produce desired effects . . . they have little incentive to . . . persevere in the face of difficulties” (p. 9, as cited in Weibell, 2011, para.12). As the literature affirms, teacher leadership often still excludes teachers from “several key areas of school decision-making” (Barth, 2013; IEL, 2008; York-Barr & Duke, 2004).

The final theme of retention influences in the data suggests some HTLs felt their positions granted them personal agency (Bandura, 1997, as cited in Weibell, 2011), they may not have otherwise in their settings; although, this theme was much more prevalent in MVHS, than CHHS. HTLs from this setting reported that the title helped them to persuade an external audience (i.e., recommendation letters or grant applications), gain flexibility and forgiveness when taking risks, and access to more professional development opportunities. It could also be that the "weight" referenced in these responses is about gaining professional autonomy. Several HTLs referenced professionalism or professional fulfillment as an influence to serve in these positions. Perhaps, these HTLs are hesitant to give up what they see as a degree of professionalism. As Day (2002) suggests, teacher leadership is viewed by some as a professionalization project.

The remaining sections of this chapter discuss a synthesis of the study’s findings and extend them to suggest a revision to the study’s original conceptual framework. The chapter ends with a new framework that asserts hybrid teacher leadership as boundary spanning from within and between teacher and school leader communities of practice, a practice influenced by both local and institutional contexts.
Discussion and Findings

Agency and advocacy were themes revealed throughout the data. For the HTLs in these settings, the desire for teacher leadership is the desire to advocate. Their experience of teacher leadership in these roles seems to have given them the sense that they can be advocates for teachers and students. Further, this sense of agency appears to be central to their decisions about whether to seek out and to remain in their positions. It also influences the way in which these HTLs talked about themselves and their practice. Therefore, I begin this section by discussing the study findings connected to the following research question: What factors do secondary public school teachers identify as influences on their decisions to serve and potentially remain in hybrid leadership roles?

Influences to serve and to remain in leadership. Prior to becoming HTLs, the study participants developed agency as a result of (a) influential school-based individuals, such as teacher colleagues or mentors and school leaders; and/or (b) pedagogical and leadership mastery experiences. All mid-career teachers, the HTL participants in this study identified individuals who provided the HTLs with images of effective leadership, instruction, or both. Moreover, even if some HTL participants did not consider leadership themselves, the data showed that influential individuals provided either validation of these teachers’ capabilities or early opportunities for informal leadership that resulted in feelings of self-efficacy, thereby inspiring the agency to lead through formal roles or modes.

The study data suggest that for some HTLs in these settings the achievement of classroom mastery or acquiring confidence in pedagogical skills was what spurred “activist desires” (Sikes, 1985, as cited in Huberman, 1993, p. 7) to extend their influence beyond the walls of their own classrooms while remaining teachers. In this way, the HTL participants’ desires to both teach and participate in leadership suggests that the HTL role can be seen as part of a boundary identity trajectory (Wenger, 1998).

The original conceptual framework of this study accounts for self-efficacy and agency as
influences in teacher leader development, but it does not directly account for modeling influences or social persuasion as catalysts within the teacher career trajectory. The study data suggest that such influences as local or school-based contextual factors, here, the “impact of colleagues and of administration” (Beauchamp & Thomas, 2009, p. 184), and the principal’s role in empowering, involving, and supporting teachers in leadership (Acker-Hocevar & Touchton, 2011; Muijs & Harris, 2007; York-Barr & Duke, 2004) are also critical in cultivating teacher development toward or teachers’ motivations for leadership in their local settings.

In this study, teachers’ feelings of self-efficacy and agency were also factors in their potential retention in their hybrid roles. They seemed to influence teachers’ embrace of their HTL roles in several ways: (a) increased agency or self-efficacy in HTL roles spurred desires for new leadership positions, (b) decreased self-efficacy in balancing classroom and leadership responsibilities caused doubt regarding longevity in their positions, and (c) lack of agency in leadership inspired questions about their future tenure in HTL roles.

Some of these HTL participants, perceiving themselves as successful agents of change, expressed desires to move into administrative leadership or other positions thus removing them from the classroom. Consistent with Huberman’s (1993) diversification stage, these desires suggest a move from what Wenger (1998) deems a boundary identity to an outgoing identity trajectory; these HTLs see themselves as capable and look toward potentially moving from teacher leader to school leader. However, other HTLs in this study cited a lack of self-efficacy or feelings of limited agency in leadership as a reason they may return fully to their classroom responsibilities, a move not accounted for in the study’s original conceptual framework.

For some, a perceived lack of self-efficacy was related to classroom practice. These HTLs felt their leadership responsibilities compromised their ability to deliver exceptional, if not effective teaching due to logistical obstacles, such as lack of time for sufficient planning or difficulty balancing classroom and leadership responsibilities. These challenges ironically led some of these participants to question the same pedagogical mastery that helped them initially acquire the agency to lead. These practical obstacles are confirmed in the teacher leadership
literature which cites the constraining forces of an intensification of labor, responsibility, and stress as part of formal leadership roles for teachers (Barth, 2001; Little, 2003). This finding also is consistent with the research that suggests teacher professional identity is composed of multiple sub-identities related to the different contexts and relationships that teachers develop (Beauchamp & Thomas, 2009; Beijaard et al., 2004). For HTLs, sub-identities of teacher and leader require reconciliation (Lieberman & Friedrich, 2010, p. 27). The literature asserts role ambiguity is a constraint on teacher leadership development (Barth, 2001; York-Barr & Duke, 2004)—a phenomenon related to the now dual role these teachers serve. However, the study findings suggest that this reconciliation process in not just between teacher and leader role identities as it was for the participants in Lieberman and Friedrich’s (2010) research. Rather, these HTLs described being challenged to redefine themselves again as teachers based on what constitutes effective classroom practice while also leading.

The study data suggest that a lack of agency or efficacy in leadership, not in teaching, was a potential reason to re-commit to the classroom alone. Those HTLs who reported feeling unable to advocate in ways that initially influenced them to take on such positions found they could not overcome what they saw as inflexible school accountability and reform policies, difficulty with colleagues, or the ability to gain the desired level of access to administrative decision-making. These findings are consistent with the teacher development and teacher leadership literature which cite the influence of agency in developing a professional role identity, and thereby role commitment (Beauchamp & Thomas, 2009; Beijaard et al., 2004; Huberman, 1993). These findings have practical implications for school administrators seeking to recruit and retain teachers in hybrid leadership roles.

**Experiences of hybrid teacher leaders.** No matter the motivation for their service in hybrid leadership roles, the teacher participants in this study moved into positions locating them among and between fellow practitioners and school or district leaders in their local contexts. They were articulate about their role functions and responsibilities in enacting leadership, as well as about the challenges and opportunities inherent in the hybrid role. Analysis of these data
informed the following research question: *How do secondary public school teachers serving in leadership positions experience hybrid roles?* First, I will briefly outline a broad finding in connection with this lead question before examining more closely findings related to its sub-questions.

Generally, the HTLs in these settings experience their roles as “middle men” who must “walk a fine line” in fulfilling their responsibilities to and addressing the needs of students, fellow practitioners, and school or district leaders. They were boundary crossers or brokers who must negotiate *both* within *and* between school communities of practice to realize their visions for the positions they hold. For them, this role held an inherent tension and complexity as the HTLs have to negotiate multiple boundaries of membership in these communities. Analysis of the data showed multiple contextual factors influence this tension. These findings inform the following sub-question guiding the study: *What contextual factors influence how secondary public school teachers serving in leadership positions experience their roles?*

**Contextual influences on hybrid teacher leaders.** HTLs’ experiences negotiating these multiple boundaries of membership are shaped by two layers of rigidity: local and institutional school contexts. Local within school contexts, such as the academic focus and size of departments or programs, as well as the school itself influenced how HTL participants aligned themselves with the departments or SLCs they were charged with leading. They identified themselves not just as teachers, but as department teachers or equated themselves with their SLC monikers, thus revealing their connections to within school instructional practice communities and micro-cultures. However, the data showed that HTLs’ experiences of their roles are influenced by two larger institutional contexts: unionized public systems in an era of school accountability and reform and institutional boundaries attached to their roles. These contexts influence both HTLs’ responsibilities and how they go about enacting leadership.

First, as fellow teachers and union members, HTLs identified as “equals” with their colleagues, explicitly citing rules of membership—teacher-to-teacher non-interference—that determine their inclusion among the practitioner communities in their settings. Such rules
complicated and often impeded how HTL participants were able to enact leadership in their settings, particularly when attempting to change or improve instructional practices. The HTLs in the study experienced tensions between having to fulfill their leadership responsibilities in connection with their fellow teachers and wanting to preserve teacher community relationships by not violating the rules of membership. These findings are consistent with the literature that cites powerful social norms of autonomy as constraining leadership by teachers (Barth, 2001; Little, 2003; Smylie et al., 2003). However, the data suggest that for the HTLs in these settings such norms are explicitly attached to union membership or association, and less about social custom than about rule—a concrete roadblock that they must lead around.

Second, these HTLs’ jobs are formal posts conceptualized by their school settings as organizational and instructional leadership roles. As such, responsibilities connected to these positions separate HTLs from their teacher communities. They become responsible in some ways for decisions that affect colleagues. But, the data suggest that these formal posts are loosely defined. In consequence, HTLs reported ever-increasing managerial responsibilities that interfered with the goals of teacher leadership as a catalyst for improved teaching and learning. This finding is consistent with challenges identified in the teacher leadership literature (Little, 2003; York-Barr & Duke, 2004). The nature of these increasing duties often aligned the HTLs with building and administrative leadership as demands on principals become almost “impossible to meet” (Danielson, 2007, p. 15). These demands appeared to be consistent with what Ronan Herzog & Abernathy (2011) attribute to the constraining force of school accountability on teacher leadership. Consequently, these roles also placed HTLs “between the classroom and the state” (Portin et al., 2009, p. vi). As teachers and teacher leaders, these individuals became both communicators and receivers of local or institutional reforms.

These contextual factors influenced the way in which the HTLs described themselves and what they do in their hybrid roles. As Wenger (1998) stipulates, identity and practice are mirror images of each other; therefore, as the HTL participants in this study described navigating these multiple memberships in their school communities of practice they were describing who they are
as leaders and their leadership. Accordingly, the next section examines findings in connection with both of the following sub-questions: (a) *How do secondary public school teachers serving in leadership positions describe their leadership?* (b) *How do their roles influence the way these teachers describe their leadership?*

**Hybrid teacher leader descriptions of leadership.** HTLs in these settings identified themselves as Initiators, Implementers, and Advocates. As leaders, they worked within their teacher communities to concurrently implement reforms on behalf of their school leadership communities and initiate change or instructional improvements independent of local or institutional reforms on behalf of teachers and students. Given that advocacy desires influenced HTLs to serve in these roles, these individuals also reported meeting such responsibilities in ways that fill the needs of students, teachers, and school or district administration. Such descriptions are consistent with Curtis’ (2013) definition of teacher leadership which accounts for “specific” or formal roles in which teachers utilize their skills at multiple levels of the system in the “service of student learning, adult learning and collaboration, and school and system improvement” (p. iii). While HTLs’ responsibilities aligned them in practice with their building leadership communities, the data suggest that HTLs in these settings are without the positional authority of administrators, a finding consistent with studies reviewed by York-Barr and Duke (2004) that showed principals as the individuals with power in teacher-principal relationships. Hence, HTLs have peripheral membership in school leadership by nature of their hybrid or middle positioning. Consequently, HTLs in this study described their leadership as gaining influence in various ways: (a) working from the periphery of their leadership communities to enact change within the boundaries of their teacher communities, and (b) working from within the boundaries of their teacher communities to permeate the leadership periphery and gain greater access to decision-making. These descriptions are consistent with boundary spanning or brokering. Wenger (1998) explains such practices require the “legitimacy to influence” in order for brokers to be able to facilitate connections between communities of practice (p. 109). This conceptualization of teacher leadership as boundary crossing also is consistent with definitions of teacher leadership in the
literature that identify it as influence and gaining access to decision-making (Barth, 2001; Camburn, 2009; IEL, 2008; Katzenmeyer & Moller, 2009; Muijs & Harris, 2007; York-Barr & Duke, 2004).

However, while current definitions account for the what of teacher leadership as influence, they do not extend to how teacher leaders influence. For example, Katzenmeyer and Moller (2009) provide the following definition:

Teachers lead within and beyond the classroom; identify with and contribute to communities of teachers, learners, and leaders; influence others toward improved educational practice; accept responsibility for achieving outcomes of their leadership.

This definition, when combined with a conceptualization of teacher leaders as brokers, provides a potential explanation for the source of teacher leadership influence as their identification with teacher and leader communities, what Wenger (1998) calls membership. It is this identification that Wenger argues legitimizes a broker, enabling an influential participative connection. And while Katzenmeyer and Moller’s definition does not extend to include the processes used to enact such influence, study data revealed that as boundary crossers, HTLs described their leadership as employing processes Wenger attributes to brokering, such as translation and negotiation, suggesting a way to interpret or potentially operationalize HTLs’ practice.

As the HTL participants described their practice, the data suggest that HTLs are enabled and constrained in these brokering processes by continuities and discontinuities or opening and closings within and between communities of practice boundaries (Wenger, 1998). These data informed the following sub-question: How do secondary public school teachers negotiate their dual roles as teachers and leaders?

**Negotiating dual roles as teachers and leaders.** First, the data showed that openings for further participation in the leadership periphery provided HTLs possibilities for mobilizing administrative attention to opportunities that would improve instruction or fill student and teacher needs. HTLs reported flexibility or autonomy to initiate programmatic or departmental
change. HTLs also described building leadership allowing for communication and flexibility where possible in administrative or reform initiatives. They adapted administrative mandates to meet department needs or aligned faculty and administrative perspectives on an initiative’s value. This negotiability (Wenger, 1998) allowed for greater department and program relevance, and thereby teacher buy-in.

Second, it seems that closings in this periphery removed HTLs from decision-making or flexibility. When confronted with these discontinuities in connection with administrative or state mandates, for example, some HTLs became protective of their teacher communities. They described acting as policy buffers or shields, negotiating compliance, rather than shared meaning of reforms. These findings are consistent with what research by Coburn and Stein (2006) suggest: a lack of local policy variability within school communities constrains the promise of reforms as drivers of change in practice. As a result, these findings have implications for the role of teacher leadership in policy implementation.

HTLs in these settings also described negotiating openings and closings within their teacher communities. While HTLs may initiate change independently, they also potentially serve as either initiators of collective agency or as proxy agents for teacher-initiated change (Bandura, 1997, 2000, as cited in Weibell, 2011). HTLs spoke of needing to build unity and collaboration within their programs or departments, especially around initiatives aimed at improved instruction. These processes were connected in the data to reports of relationships or relationship building and trust. As Bryk (2010) argues, relational trust is a key ingredient in instructional change as an influence on teacher buy-in. However, when HTL roles are interpreted as boundary crossing, HTLs’ collaborative and trusting adult relationships take on a new level of importance as enabling factors in fulfilling hybrid leadership responsibilities.

To explain, the data reveal that HTLs serve as a form of representative leader in teacher communities where they identified as “equals.” Each of the HTL participants reported that advancing instructional improvements as part of their responsibilities cannot include violating the rule of union or association membership which stipulates teacher-to-teacher non-interference.
However, fulfilling leadership responsibilities may require them to act in opposition with collective desires, thereby potentially damaging the trust and legitimacy boundary spanners need to enact change. They described brokering processes to indirectly, rather than directly handle the situation. They mobilized administrative attention through private consultation or provided more informal suggestions or direction to the teacher. HTLs described part of their leadership as advocacy for teachers, both in the face of reforms, but also more immediately in terms of filling their needs. Such descriptions in the data suggest that HTLs see teacher advocacy both as a function of the role and as an enabling relationship-building practice, just as relationships with administration were described in the data as enabling administrative trust and flexibility. These brokering processes seem to be central to HTLs’ advocacy in these settings, no matter the other roles they may fulfill.

In this way, the role of HTLs as Advocates seemed to stretch across all of the other role descriptions in both settings. It was a term used often to describe not just what HTLs do, but who they are in these settings. This intersection in the data could represent the ways in which the HTLs are positioned between and among the memberships of multiple, within school communities of practice. These relationships are influenced by local and institutional contexts locating HTLs as separate from and equal to teacher communities, and amid school leadership community peripheries. To enact leadership in these dual roles is to advocate as boundary agent for the school, students, and teachers by facilitating, negotiating, and mediating change and the implementation of reforms.

Therefore, a revision of the study’s conceptual framework now locates HTLs not in a distinct space between teachers and leaders. Rather, the study findings suggest that HTLs remain equal within their teacher communities of practice while perforating the boundaries of their school leadership communities. They fulfill their dual roles and responsibilities through brokering processes and advocacy that helps them to gain and preserve the legitimacy to influence.
Hybrid Teacher Leader as Boundary Crosser: A Conceptual Framework

**Figure 5.** Hybrid teacher leaders as boundary crossers between and within school communities of practice.

The circles in Figure 5 illustrate the overlapping or intersecting relationships between these HTLs’ memberships inside within school communities of practice. As boundary crossers or brokers they are first positioned as teacher members of their instructional practice communities, a relationship represented by the circle on the left in the diagram. These HTLs are mutually engaged in practices that tie them to the issues and needs of colleagues, students, and classrooms, as listed within the *Teacher* circle of Figure 5. The local school and larger institutional contexts represent a combined influence on these memberships, as represented by the dotted and solid lines surrounding the circles in Figure 5. HTLs work in classrooms where they too are bound to administrative directives and state accountability measures. HTLs also are bound by rules of membership in this community that are further informed by their institutional reform contexts. Study data showed that as part of unionized public school systems, HTLs...
explicitly stated or marked a clear boundary of inclusion in an equal relationship with fellow union members. Thus, this boundary is indicated in Figure 5 with a dark or closed line around the teacher community of practice.

While remaining included in these teacher communities, HTLs are also separated by nature of their formal positions. As teachers turned teacher leaders, they participate peripherally in administrative or building leadership communities. While they have responsibilities within these communities, they are not at the core of administrative practice—a positioning that would compromise their inclusion in the teacher community. Hence, the dotted line circumscribing the leadership community in Figure 5 indicates opportunities for participation, but not full inclusion. As listed within the Leader circle in Figure 5, HTLs have knowledge of and access to school or district responses to state or administrative reforms, access to program or department-wide student performance data, responsibilities for the management of overall academic climate, and the ability to influence or initiate changes that affect teachers. To the extent HTLs are able to push into or pull against these boundaries, they identify themselves and describe their leadership in different ways as each action requires different practices within their leadership.

From this boundary space, represented by the shaded, overlapped circle in the center of Figure 5, HTLs gain legitimacy in part because of the knowledge and experience they have of and within both communities. But, they also must work to preserve that legitimacy through practices left unidentified in the study’s original conceptual framework (Figure 1) that are now listed within the center circle under Teacher Leadership in Figure 5. HTLs maintain legitimacy by advocating for both groups in ways that help them to fulfill their responsibilities and advance change while building unity and maintaining member relationships and trust. Thus, HTLs influence by employing brokering practices to connect both groups, such as those listed above Teacher Leadership in the center circle: translating, coordinating, and aligning perspectives; mobilizing attention; and addressing conflicting interests of both communities (Wenger, 1998). HTLs become advocates on behalf of both teacher and administrative leader constituencies.

It could be that the degree to which these circles of membership overlap and the school
leadership periphery is permeated, less tension and more opportunities for continuities open within and between these boundaries. The data provided examples of HTLs who gained access to decision-making and leadership autonomy or flexibility in order to initiate programmatic change or relevant adaptions to local and state reform initiatives. These circumstances evoke conceptions of Spillane’s (2005) theories of leadership as distributed or “stretched over” leaders, followers, and situation, rooted in social relationships or interactions within these systems. Where HTLs in the data found discontinuities, boundaries became more rigid and served as a form of separation, thus protection, especially in response to accountability reforms. From within these teacher boundaries, HTLs become boundary agents, and therefore a form of representative teacher influence. In consequence, whether initiating change or implementing external directives, HTL must build unity and collaboration within this teacher boundary, as well as provide alignment, and thereby greater overlap with administrative visions for change.

Re-conceptualizing formal hybrid leadership roles as boundary crossing or brokering has implications for the way in which teachers serving in these roles see themselves and their practice, but also helps to inform the ways schools and systems might design, implement, and support these roles. The last chapter explores these and other implications of the study’s findings as they may inform HTL practice and support, as well as future research.
CHAPTER 6: Conclusion and Implications

This qualitative case study explored how eight secondary public school teachers experience formal leadership positions while maintaining classroom responsibilities. The study’s questions examined how these hybrid teacher leader (HTL) positions influenced participants’ descriptions of themselves as leaders and their leadership practice, as well as how they negotiated these dual roles as teachers and leaders. The study also investigated participants’ reported influences on their decisions to both serve and remain in hybrid leadership roles.

Participants were recruited from two large unionized public schools in the northeastern United States: one urban, one suburban. Data included: individual and group interviews with HTLs and their administrator and teacher role partners in these settings, work-shadowing observations of participants, and documents related to each school context. Documents related to HTL participants’ leadership responsibilities were also collected, including job descriptions, meeting agendas, and faculty and administrator communications.

Study data revealed HTLs in these settings came to their positions influenced by agency development gained through school-based leadership modeling influences or pedagogical mastery and activist motivations, findings consistent with Wenger’s (1998) boundary identity trajectory and Huberman’s (1993) diversification career stage. Furthermore, HTLs described themselves as leaders and their leadership practice in these roles in ways consistent with boundary spanning or brokering (Wenger, 1998). HTL participants’ formal positions located them both within and between teacher and school leadership communities of practice influenced by local, as well as institutional union and school reform contexts. Accordingly, data showed that HTLs in these settings serve as boundary crossers or brokers. They work on behalf of and fill the needs of both constituencies. Their experience of multi-membership in both groups helps them to gain the legitimacy to influence in multi-faceted roles of initiation, implementation, and advocacy.

The data indicated that in order to fulfill both their expectations for their roles as Initiators of change, as well as their responsibilities as Implementers of administrative or state mandates,
HTLs had to work within their teacher community boundaries using the following processes: building unity, translating external perspectives, and negotiating compliance or teacher buy-in. Enabled by trusting relationships that membership in these unionized teacher communities may imply but not guarantee, HTLs in these settings described filling the needs of their fellow teachers as another way to engender trust. Moreover, where openings occurred in the peripheries of their school leadership communities, HTLs worked to garner resources, flexibility or autonomy, and authority to enact change on behalf of teachers and students. They mobilized administrative attention to opportunities and needs for change, coordinated appropriate policy adoptions, and took on an overflow of managerial duties. Their knowledge and experience as teachers, as well as their perspectives of program- or school-wide needs potentially enabled trust and participation within their school leadership community peripheries.

The data suggest that no matter the reasons these HTLs came to their leadership roles, what the scope of their responsibilities are, or what they desire them to be, all of the HTLs described a difficult “balancing act” of addressing needs and building or preserving relationships within and between both teacher and school leader communities. HTLs must serve fellow teachers and meet the expectations of administration in doing what is in the best interests of students. Furthermore, HTLs must do so in ways that help them to “manage carefully the coexistence of membership and non-membership” in these groups by “yielding enough distance to bring a different perspective, but also enough legitimacy to be listened to” (Wenger, 1998, p. 110). As a result, advocacy is how they lead, and it enables them to lead. As one participant explained it: “A teacher leader is—I want to say advocate... that nexus between the teacher and the administrator. In all senses of the word.” This is the job of the broker: one the data reveal is complex.

To the extent that they acquired agency and self-efficacy in these complex jobs, HTLs in these settings were either considering additional opportunities for leadership that would remove them from the classroom entirely, or contemplating a full-time return to the classroom, as a result of difficulties in initiating change or balancing classroom and leadership responsibilities.
Implications

While this small scale, qualitative research study lacks generalizability, the study’s findings are not without implications for how schools and districts might design, implement, and support formal leadership roles for teachers, as well as recruit, develop, and retain teachers as leaders. The last section of this chapter outlines these implications.

Hybrid teacher leader recruitment. Study findings related to what influenced these teachers to desire hybrid leadership roles have implications for how schools and districts may “[awaken] this sleeping giant of teacher leadership” (Katzenmeyer & Moller, 2009, p. 3). Two of these findings suggest that, when implementing hybrid positions, schools or Districts could benefit from the creation of multiple opportunities for both formal and informal leadership by teachers and the employment of purposeful recruitment of would-be teacher leaders.

First, the study data suggest that for some of these HTLs, desires to serve in hybrid roles emerged as the agency to advocate for teachers, students, and the school as a result of acquired confidence in or mastery of pedagogical skills. In fact, some participants actively sought avenues for leadership, looking for ways to diversify their roles and share their expertise while remaining in their own classrooms.

In both of the study’s research settings, hybrid positions for teachers exist, offering the possibility for classroom practitioners to teach and to lead concomitantly, thus moving beyond the limits of teaching. For the HTL participants, these roles became the outlet for leadership. Yet, in many settings, the number of positions available are few, and openings are not always available at the time particular teachers may be ready for additional responsibilities. These circumstances then beg the question: How many more teachers in these and other schools are ready and waiting for opportunities to lead? So in environments where these kinds of formal leadership positions are rare, or few, or do not yet exist, teachers who desire to diversify through leadership are left without school or district applications for the agency they have developed.

As Lambert (2003) argues, in absence of within school outlets for these desires, teachers
look elsewhere, applying their expertise, passions, and energies outside the local school system. The result: a valuable resource for instructional and school improvement is potentially squandered. Schools and districts that offer multiple opportunities to lead beyond the classroom, both formally and informally, may provide a pathway for further individual development of experienced teachers, ensuring teacher expertise is shared and cultivated within the local system. Additionally, in settings where formal HTL roles do exist, these positions could be used to cultivate, rather than limit leadership opportunities for all teachers.

Second, in addition to increased pedagogical confidence, study data proved consistent with the literature highlighting the importance of school-based contextual factors in cultivating teacher leadership. Some HTLs in this study did not consider themselves capable or ready for a shift toward more varied responsibilities, while others were even reluctant to acknowledge they had classroom expertise worthy of sharing in more than informal ways. Influential school-based individuals, including colleagues and administrators who served as leadership role models, proved persuasive in motivating teachers toward leadership, or provided early opportunities for leadership mastery that cultivated teachers’ development and desires for leadership in their local settings. This finding suggests that the principal and other individuals, such as experienced fellow teachers can be critical in cultivating teacher leadership in two ways: (a) the purposeful validation and identification of teachers with the potential for leadership, and (b) the appropriate matching of these individuals with opportunities to make change as budding leaders. In fact, study findings place a new level of emphasis on the effect formal and informal colleague mentors could have in leadership, not just pedagogical development of less experienced faculty.

In contexts where teachers are already leading in formal ways, school or district leaders could leverage these positions to extend teacher leadership to more than the few teachers who occupy these positions by making part of HTLs’ responsibilities connecting other teachers with informal opportunities for leadership. In other words, HTLs themselves could become conduits for the empowerment of other teachers through the provision of informal leadership opportunities, making these formal positions a way for school systems to spread teacher leadership to more
Hybrid teacher leadership: challenges and opportunities. Study findings related to the experience of HTLs, in particular the challenges and opportunities inherent in their formal positions, resulted in a revised conceptualization that could inform the ways in which these kinds of positions are designed and supported. In addition, the study’s revised conceptual framework suggests areas for further teacher leadership research.

Hybrid teacher leadership as teacher advocacy. The conceptualization of HTLs as boundary crossers places trust and relationship building through teacher advocacy and adult collaboration at the center of the teacher leader enterprise. While definitions present in the literature already emphasize adult collaboration as an end of teacher leadership (Curtis, 2013; Katzenmeyer & Moller, 2009; LeBlanc & Shelton, 1997; York-Barr & Duke, 2004), this conceptualization emphasizes teacher-to-teacher relationships as means necessary for enabling teacher leadership in formal hybrid roles. Study findings suggest that as teachers in these settings became hybrid leaders, their positioning remained equal to practitioner colleagues within the borders of their teacher communities of practice while also separate from them. From this location, HTLs gained the legitimacy to influence fellow practitioners, in part, because of the knowledge and experience they have of these teacher communities. But in order to maintain this legitimacy, the HTLs had to fulfill their multi-faceted responsibilities of initiation, implementation, and advocacy in ways that continued to engender the trust of teachers, as well as administrators.

HTLs reported that teacher trust was granted to them initially through union association; however, this same trust was potentially threatened by responsibilities HTLs had that could affect fellow teachers, in particular advancing instructional improvements in ways that might undermine non-interference rules of membership in these unionized contexts. And yet, the HTLs had to advance administratively driven instructional changes or risk damaging administrative trust that allowed these teacher leaders to influence school leadership to advance changes desired by their teacher communities. Therefore, HTLs described teacher and administrator advocacy as both a
means and an end. HTLs advocated with administration on behalf of other teachers in order to preserve faculty relationships necessary for them to implement reforms on behalf of school leadership. At the same time, HTLs advocated for administrative reforms in order to build the school leader relationships necessary to influence change on behalf of their instructional communities of practice.

Consistent with the teacher leadership literature, the HTLs in these settings reported that these leadership functions (leveraging relationships with both fellow teachers and administrative leaders) were the most challenging and complex. While teachers are usually trained in developing appropriate student-to-teacher relationships, the HTL participants in this study reported receiving no leadership training for their formal roles. They expressed desires for more support in these more “human relations” elements of their roles. In fact, some HTLs tried to acquire it externally on their own or even sought other HTLs in their buildings for such support. Study findings suggest teacher advocacy may be critical in developing the social relationships necessary for HTLs to enact leadership, and thus provide a potential focus for professional development for HTLs already serving in or preparing for such positions. These findings also have implications for further investigations into teacher leadership.

This study focused on formal pathways of leadership for teachers. But, newer conceptions of teacher leadership in the literature reveal a move away from classifying teacher leadership solely as formal appointed positions (Smylie et al., 2003) toward the inclusion of more informal or spontaneous teacher leadership (Danielson, 2007; IEL, 2008; Muijs & Harris, 2007) as a form of shared influence by groups of teachers. Therefore, these newer conceptions evoke an image of teacher leadership that is enacted in ways more consistent with collective action: teacher leadership by all rather than some.

To what extent informal teacher leadership emerges organically by way of collective influence or agency in these settings was outside the scope of this study. However, the study data suggest that HTLs in these settings are seen as the conduits through which teachers gain localized influence with administration, potentially precluding the necessity for, or compromising
the conditions which cultivate collective action by teachers more informally. In fact, as boundary agents, HTLs become delegates for their communities, and thereby symbolic of the need to unite leader and follower groups that are separated by powerful social norms, especially in institutional contexts where the boundary between teacher and administrator comes with deep historical roots. Thus, this very function of the HTLs’ roles and the means they use to fulfill these responsibilities potentially could be reinforcing the teacher-administrator hierarchy, rather than flattening it. There may be a relationship between the degrees to which formal teacher leadership positions as forms of representative influence prohibit or discourage teacher collective action or influence.

Furthermore, definitions of teacher leadership in the literature, such as York-Barr and Duke’s (2004), tend to focus on teacher leadership as individual or collective influence. While HTLs who hold formal positions in these school sites fit within the scope of these definitions, a conceptualization of HTLs as boundary crossers suggests a lacuna in these former definitions: the process by which an individual teacher leader in a specific role influences on behalf of, or as representative of the collective teacher community of practice. This process of representative influence would account for how the HTL as delegate must first bring teachers together around shared visions. It would also account for circumstances when this boundary agent’s perspectives both converge and diverge from those of the collective. Thus, the addition of representative influence or brokered influence to York-Barr and Duke’s (2004) definition becomes important in future operationalization of investigations into teacher leadership practice through formal hybrid roles.

**Hybrid teacher leadership as brokering.** As boundary crossers, HTLs had to work within the teacher community boundaries and navigate between teacher and leader borders filling the needs of both constituencies in ways that enabled them to maintain the critical social relationships necessary to enact leadership in this boundary space. In these settings, HTLs employed practices that evoke conceptions of Wenger’s (1998) brokering, such as mobilizing administrative attention, translating and aligning teacher and administrative perspectives on
change initiatives, and negotiating flexibility in implementation of reforms. These findings have several implications for future research into teacher leadership practice.

First, while the teacher leadership literature asserts a what and who of teacher leadership as: knowledgeable and collaborative teachers who influence adults within their school communities, research has yet to explore deeply the how of teacher leadership (Curtis, 2013; IEL, 2008; Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004). Conceptualizations of HTL leadership as brokering may provide a framework for operationalizing investigations into how HTLs navigate within school communities in order to drive change. This could lead to better understanding of the types of negotiations around practice Wenger (1998) finds at the core of community memberships. It could also lead to a conceptualization of a potential source of teacher leadership influence—membership or inclusion in local, within school teacher communities of practice.

**Hybrid teacher leadership as navigation of openings and closings.** The opportunities and challenges HTLs in this study experienced when initiating and implementing change efforts highlight the ways in which particular organizational structures can be leveraged to enable and support hybrid teacher leadership. Where their desires to become initiators of instructional and programmatic change were fulfilled, structures existed that allowed for communication and coordination between the teachers and the HTLs, as well as between administrators and HTLs. In-person meetings and electronic communications pathways provided opportunities to coordinate perspectives, share and negotiate visions for change and its implementation. Where these structures were either compromised by temporal contextual factors of reduced time, or were not seen as adequate enough to support sustained collaboration, the HTLs were unsuccessful. When granted flexibility or authority by administrators to negotiate adaptations based on programmatic contexts, HTLs can influence changes in practice while maintaining the integrity of state and District or school level policies (Coburn & Stein, 2006). However, the study findings also suggest that these structures alone are not enough.

As Fullan (1996) posits, superficial "restructuring" without "reculturing" will not advance a
learning agenda in schools. As he emphasizes: “creating collaborative work cultures is incredibly complex” (p. 247). Conceptualizing hybrid teacher leadership as boundary crossing certainly places an important emphasis on within community membership of teachers as a source of that complexity. However, this conceptualization also expands the critical focus to between community memberships and collaboration. School-based administrators must work to provide the openings in their leadership community peripheries to allow for greater alignment between teacher and administrator visions for change. One way to do so is by engaging HTLs in meaningful work closer to the core of the administrative leadership community (i.e., formulation of school and district visions, access to and influence in administrative decision-making).

**Hybrid teacher leader retention.** Study findings suggest that self-efficacy and agency are factors that may influence HTLs’ decisions to potentially remain in their formal leadership roles. First, where these HTLs reported feeling successful, they also reported desires to continue in these roles. These findings suggest that HTL roles could be a way for schools or systems to prepare and promote future principals or other school leaders from within. HTL positions could be avenues through which teachers cultivate desires to invest in their schools in even deeper ways. Second, where these HTLs experienced difficulties, HTLs cited a lack of agency in their leadership roles, or an inability to make change, as a potential motive to leave. In particular, HTLs in the study cited among the factors limiting their agency as leaders a lack of flexibility and autonomy in implementing visions for change, as well as a lack of participation or influence in administrative decision-making concerning issues affecting teachers. Such findings should encourage building leaders who work with HTLs in their settings to let these teachers lead.

Principals are critical in creating “the conditions in which teacher leadership can emerge” (IEL, 2008, p.1). And yet, the teacher leadership literature suggests that school-based administrators are often a constraining influence on leadership by teachers due to powerful social norms connected to historical hierarchical relationships between teachers and school leaders (Barth, 2001; Danielson, 2013; IEL, 2008; York-Barr & Duke, 2004). Study findings further reinforce the need for districts considering implementation of teacher leadership roles to gauge
the degree to which their principals, not just their teachers, may be ready for shared leadership models.

HTLs in these settings also reported feelings of inadequacy in the classroom and desires for more leadership support in this difficult work. Some described the struggles they face in balancing their classroom and leadership responsibilities. Insufficient time for planning, difficulty balancing classroom and leadership responsibilities, feelings of isolation, and a lack of agency in their leadership: HTLs cited these challenges as potential reasons to leave their leadership positions. While eliminating some of these challenges may be easy (such as reducing an overall HTL course load), these kinds of changes alone may not help HTLs moving into these new roles reconcile and renegotiate what it means to be a leader in these pseudo-administrative positions, or what it means to be an effective teacher while balancing the increased demands of hybrid roles.

Wenger (1998) stipulates that “uprootedness is an occupational hazard of brokering” because boundaries do not have the same kind of shared understanding of competence in practice as the core of membership. Wenger further suggests: “reinterpreting [a broker’s] experience in terms of the occupational hazards of brokering is useful for both the broker and for the communities involved.” Accordingly, this reinterpretation can allow brokers to find and use each other for support, perhaps even develop shared practices “around the enterprise of brokering” (p. 110). These study findings could inform ways individuals who currently serve in these roles interpret their experiences and their leadership practices, providing important personal reflection in the reconciliation processes necessary in this boundary space. These findings may also encourage schools currently utilizing HTL positions to create structures for the teachers serving in leadership to engage in shared reflection and professional learning connected to their experiences both as teachers and as leaders.
Conclusion

In recent years, teacher leadership and teacher leader roles have become prominent in reform agendas where teacher leadership is viewed as “a catalyst for school improvement” (Hallinger & Heck, 2010, p.106). In consequence, teacher leadership has been recognized as a “sleeping giant” (Katzenmeyer & Moller, 2009) that, if awakened, could help education systems “do more with less.” Research suggests that schools must re-organize to support a faculty's capacity to work together in “inclusive-facilitative leadership” models (Bryk, 2010, p. 25). In fact, Bryk (2010) argues that these models are “essential to advancing student achievement” (p. 25). Both the federal government and states are initiating programs to support these expanded roles for teachers. It seems the “sleeping giant” of teacher leadership is now stirring. And as the giant stirs, schools and systems will need ways to inform both the design and support of leadership roles for teachers. Teachers, as part of this new professional niche, also will need ways to understand themselves and the consequences of stepping between the boundaries as both teachers and leaders.

Existing state public school models and recent federal initiatives call for the expansion of leadership roles for teachers (DCPS, 2013; Portin et al., 2009; USED, 2013). Curtis (2013) argues that if teacher leadership roles, formal or informal, are to be both sustainable and effective in reaching the goals for which they are instituted and envisioned, then “form must follow function” (p. 2). She posits that structuring these roles in ways that advance the visions they were meant to realize is important in attaining and sustaining their effectiveness. To the extent that study findings revealed the experiences of teachers serving in formal hybrid leadership roles and the challenges and opportunities inherent in their positions, school systems may utilize these insights to examine existing structures and conditions for support of current HTL roles, as well as to inform design and creation of such roles. This research may provide data to consider in setting policy for developing and supporting teachers in these roles, and to help advance teacher leadership as a fundamental—and not ancillary—part of school structures.
APPENDIX A
Hybrid Teacher Leader Interview Guide One

Researcher:
Participant Name:
Participant Title:
District:
School/ Building:
Department/Content Area/PLC:
Date of Interview:
Meeting Time and Duration:

Opening:

Thank you for agreeing to speak with me today. I appreciate your time and your assistance in this study of teachers who serve in dual roles as teachers and leaders in their schools. As I have mentioned before, through this study, I hope to learn about the experiences of individuals who serve in these kinds of roles, what influences them to serve and/or remain in these roles, and how they describe and fulfill these roles. I am also interested in how individuals who hold these kinds of positions are influenced by them. I would like to use the information I gain from the study to inform how teachers in positions of leadership are supported and developed, as well as provide school leaders looking to implement such roles information about what they look like and how they are utilized and experienced by districts. As these kinds of positions are becoming more common, I hope to add the experiences of teachers who have served in these roles to the dialogue around teacher leadership as a catalyst for school improvement.

Before we begin, I would like to remind you that as outlined on the informed consent document, you may stop your participation at any time during the interview process or later. If you choose not to participate, any data collected will be destroyed. In addition, should you choose to continue your participation, your responses will be audio recorded (with your permission) and then transcribed. I will provide you with a copy of the transcribed interview for your review and approval prior to utilizing any of your responses to inform the study. Your interview and the information it contains will remain confidential and anonymous. (If informed consent has not yet been secured from the participant, read, review, and ask if there are questions, before inviting the participant to sign the form.) Do you have any questions?

Part I. Interview Questions

Background:

1. How many years have you been with the District and in what capacities?

2. How long have you served as a (HTL), and how you came to be a Teacher Leader in your building?

Prompt:
   • What was the process for applying to the position?
Leadership Practices and Experiences of HTL:

3. Describe your current role and responsibilities as a (HTL).

Prompts:
- What does a typical day/week look like when fulfilling your responsibilities?
- Tell me about how you came to understand your role and responsibilities as a Teacher Leader.
- Who do you work with in your role as (HTL)?
- Compare and contrast your position to other (HTL) roles in the school?
- Has the role changed at all in your tenure in the position?

Dual Role/Brokering Practices

4. Describe the leadership structure in your school and/or district?

Prompts:
- What do you see as your role or purpose in this structure?
- Tell me about the ways leadership is shared, if at all, between (HTLs), teachers, and administrators?
- Describe a situation in which you felt you were sharing leadership with others?

5. Tell me about how this position fits the needs of the district, building, your department (may include, grade level, content area, or PLC)?

Prompts:
- Can you tell me more about how you came to understand those needs?
- Can you give me an example?

6. How does this position relate to, or interact with your classroom responsibilities, if at all?

7. Tell me about what it is like to be both a classroom teacher and a (HTL)?

Prompts:
- Does your (HTL) role influence your teaching? (How so? Probe for examples)
- Does your role as a classroom teacher influence your fulfillment of the (HTL) positions? (How so? Probe for examples)

School/Institutional/Social Context:

8. What is the nature of your interactions (as a HTL) with: (Ask about each identified group: administrators, other teachers, and other [HTLs].)?

Prompts:
- What is your role in working with each of these groups?
- Could you describe a typical meeting, interaction, or day with teachers, administrators, or other Teacher Leaders?
- How would you characterize or describe these interactions?
9. What factors influence your position? (Probe for contextual factors: faculty/department, school, building, district, community issues, reform initiatives)

Boundary Identity/Desires/Experience of HTL

10. How would you describe yourself as (HTL)?

11. How would you describe your leadership?

Prompts:

- What do you hope to accomplish within your role as (HTL)?
- Describe a moment in your current position when you felt effective and/or successful. (After description) What was it that helped you to be successful in this situation?
- Describe a moment in your current position when you felt challenged. (After description) What was it that you think influenced your feelings in this situation?

12. How do you see yourself evolving in your role as (HTL)?

Prompts:

- How has this position influenced you? (Probe for examples.)
- Do you plan on continuing in your current (HTL) position?
- Why? Or, why not?
- Will you seek other positions of leadership? (Probe for examples and explanation.)

Part II. Narrative of Path to HTL Role

I would like to use the last part of our time together to explore the path that you followed to your current position and what might have influenced you along the way. To help you remember and to capture as much detail as possible for later, I’d like to start by asking you to draw a timeline that starts from the present and moves toward the past to your first teaching position. Then, as we talk, I’d like for you to mark what you see as the most important or significant moments, events, or incidences that led to your current leadership position, providing a brief label to each.

13. Could you start by telling me about how you came to be a (HTL)?

(Probe during the interview for information related to study’s conceptual framework: teacher desires, beliefs, professional development experiences, feelings of agency/self-efficacy, details about when in the career stage certain positions or changes occur. Probe for further explanations and interpretations of these influences as they are mentioned.)

Possible Prompts/Probes:

- Why did you want that position?
- Why did you believe this moment was so influential?
- Was there a particular person or group of people who influenced you during that
time?
- In what way were he/she/they influential?
- What happened at (note segment) that influenced your interest in taking on responsibilities outside your own classroom?
- Did you receive special training at that time?
- Were their particular educational experiences that were influential?
- What was happening in your classroom or with your teaching during that time?
- What caused you to change positions at that time?
- What changes have taken place since then?
- Where might this timeline lead to next?
- What is happening right now that is influencing your thinking about your (HTL) position?

14. Is there anything else you would like to share regarding your experiences as a (HTL) in your District?

15. I would like to be able to learn more about this position, the school’s leadership structures, and/or working environment? Who do you think could provide further information on these topics? I’d also like to speak to those you work with in fulfilling your (HTL) role. Who would you recommend I speak with?

Closing:

Thank you, again, for sharing your time and responses with me today. I appreciate your willingness to participate and your thoughtfulness in responding. Before you leave, may I check to be sure I have your preferred contact information? As soon as I have transcribed the interview, I will contact you with a copy for your approval so that you may revise any inaccuracies before sending it back to me. Here is my contact information should you have any other questions or additional information you would like to share.
APPENDIX B

Hybrid Teacher Leader Focus Group Interview Guide Two

Researcher:
Participant names, titles, and departments/content/areas/PLCs:
District:
School/ Building:
Date of Interview:
Meeting Time and Duration:

Opening:

Thank you for agreeing to meet with me again today, altogether. I really appreciate your willingness to participate and your time. I am bringing you all together today to share with you my interpretations of your roles and responsibilities as I observed them while shadowing each of you. I would like to get your feedback and clear up any inconsistencies between my observations and your actual experiences within each of your positions. In addition, I hope to learn about some of the benefits and challenges of these positions as you have experienced them. This information will help me to formulate a more complete understanding of your roles and your experiences within them. I really appreciate you sharing your thoughts with me today. Before we begin, I’d like to review a few guidelines concerning the process.

- No names will be shared in my study.
- In order to be sure that everyone’s voices are heard and that I record your responses accurately, I will be recording the focus group with your permission.
- I would like everyone to participate and may call on you if I haven’t had the chance to hear your input.
- I would like to hear everyone’s honest opinions and experiences. There are no correct answers, so please don’t be afraid to speak up if you don’t agree with my observations or with others in the group.

Report on Observations:

1. Specific prompts for this section of the interview will be created after preliminary analysis of direct observation data. Some more general prompts may include:
   - Are these activities typical of your positions? How so?
   - If not, please describe more typical activities.
   - What is missing from my observations that you would like to include?
   - What about these observations resonates with you?
   - Which of these activities would you deem essential to fulfilling the position’s responsibilities?
   - What individuals would you work with that were not a part of these observations?
   - In what ways do you interact with those individuals?
   - How would those interactions be similar or different from the ones I observed?

2. Are there obstacles or challenges in filling these roles? If so, how do these obstacles and
challenges affect or influence how you fill your responsibilities and perform your role?

Prompts:
- Thinking about your activities so far this year, could you provide some examples of these challenges?
- In previous years?
- What about when you first started in this position?

3. What do you see as the benefits of these positions? (Probe for examples.)

4. What would do you feel would support you in fulfilling your roles? (Probe for examples and when possible, incorporate observed or previously reported activities to aid reflection.)

5. Does fulfilling this role influence your relationships with your teacher colleagues? (How so? Probe for examples)

6. Is there anything else you would like to share?

Closing:

Thank you, again, for sharing your time and responses with me today. I appreciate your willingness to participate and your thoughtfulness in responding. Here is my contact information should you have any other questions or additional information you would like to share.
Thank you for agreeing to speak with me today. I appreciate your time and your assistance in this study of teachers who serve in dual roles as teachers and leaders in their schools. As I have mentioned before, through this study I hope to learn about the experiences of individuals who serve in these kinds of roles, what influences them to serve and/or remain in these roles, and how they describe and fulfill these roles. I am also interested in how individuals who hold these kinds of positions are influenced by them. I would like to use the information I gain from the study to inform how teachers in positions of leadership are supported and developed, as well as provide school leaders looking to implement such roles information about what they look like and how they are utilized and experienced by districts. As these kinds of positions are becoming more common, I hope to add the experiences of teachers who have served in these roles to the dialogue around teacher leadership as a catalyst for school improvement. You have been identified as someone that HTLs work with closely. I hope you will help me to understand what the roles and responsibilities are for individuals who serve in these kinds of positions in your school. I also hope to gain information about what influences these positions, how they are used in the school or district, as well as the benefits and challenges of these positions.

Before we begin, I would like to remind you that as outlined on the informed consent document, you may stop your participation at any time during the interview process or later. If you choose not to participate, any data collected from you will be destroyed. In addition, should you choose to continue your participation, your responses will be audio recorded (with your permission) and then transcribed. I will provide you with a copy of the transcribed interview for your review and approval prior to utilizing any of your responses to inform the study. Your interview and the information it contains will remain anonymous. (If informed consent has not yet been secured from the participant, read, review, and ask if there are questions, before inviting the participant to sign the form.) Do you have any questions?

1. How long have you worked in the District and in what capacities?

Follow-up Questions:

- How long have you been a principal/teacher working with (HTLs)?
- Were you in an administrative/teaching position when the roles of (HTLs) were created?
- What do you remember about that change?

2. Describe the leadership structure in your school or district (as well as your
3. Tell me about the (HTL) position in your building/department/content area/grade level/PLC?*

Prompts:
- What do you see as the role of a (HTL)?*
- Describe the responsibilities of the (HTL) in your building/department/content area/grade/level/PLC?*
- What do you see as the purpose of (HTLs) within the leadership structure you described?
- Who do (HTLs) work with as part of their positions?
- For administrators: How are the responsibilities of (HTL) communicated?

Further Prompts:
- Could you give me an example of how a particular duty or responsibility has been communicated recently?
- Describe your expectations for (HTLs) in your building.
- Have these changed at all during your tenure in the building/district?

4. In what ways do you and other (teachers or administrators) interact with the (HTLs) you work with?*

Prompts:
- How would you characterize the purpose of these interactions?
- How frequently do you work or interact with (HTL)?
- Could you describe a typical meeting, interaction, or day?
- How does this position relate to, or interact with your (administrative or classroom) role or responsibilities, if at all? (Probe for examples.)
- Tell me about the ways (HTLs) might share leadership with administrators and/or teachers. (Probe for examples.)

5. What factors influence how the (HTLs) are utilized and fulfill their roles now and in the past? (Probe for contextual factors--district, building, department level).*

6. Tell me about how the (HTL) position addresses the needs of the district or your building.

Prompts:
- Can you tell me more about how you came to understand those needs?
- Can you give me an example?
- In what ways might the (HTL) position be considered unique in your building, and/or district?

7. What do you see as the benefits and challenges of the (HTL) position?*

8. Is there anything else you would like to share about the (HTL) role?
Closing:

Thank you, again, for sharing your time and responses with me today. I appreciate your willingness to participate and your thoughtfulness in responding. Before you leave, may I have your preferred contact information? As soon as I have transcribed the interview, I will contact you with a copy for your approval so that you may revise any inaccuracies before sending it back to me. Here is my contact information should you have any other questions or additional information you would like to share.

* These questions were used as prompts during individual conversations with teacher role partners.
## APPENDIX D

### Sample Role Ordered Data Display Matrix

<table>
<thead>
<tr>
<th>NAME</th>
<th>ROLE</th>
<th>RESPONSIBILITIES</th>
<th>ROLE DESCRIPTION</th>
<th>TL INFLU CLASSROOM</th>
<th>CLASSROOM INFLU TL</th>
<th>INFLU SERVE</th>
<th>INFLU REMAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin</td>
<td>SLCC</td>
<td>INST: Rostering students, adding courses (levels), scheduling teachers, student monitoring (i.e. grades, attendance, student discipline, PD), data analysis and interpretation (connected to recruitment), student recruitment, program promotion, monitoring overall academic program (&quot;raising overall rigor&quot;)</td>
<td>&quot;Do it.&quot; &quot;Administrative...structural of how the whole...program works.&quot; &quot;Broader&quot; or wider than DIR, &quot;Student advocacy, communication, problem solver&quot; (as &quot;critical place&quot;). &quot;Fill a lot of needs.&quot; &quot;Filter that is able to connect people or students to families to services to information.&quot; &quot;I push the envelope, I do things I'm not supposed to do.&quot; Find leadership opportunities for other teachers</td>
<td>Priorities—&quot;too much to do&quot; (everyday work spent on TL rather than lessons), &quot;sequences,&quot; &quot;teaching,&quot; &quot;planning&quot;</td>
<td>&quot;Outstanding&quot; influence — &quot;everything that they say I immediately can filter to what it means to people who have classes and an advisor. I hear it that way...I know why they're going to be mad and I know why we should be mad and I...I have not, I don't feel distant at all from any teacher and I don't think that they feel distant from me.&quot;</td>
<td>&quot;Rewarded&quot; by the &quot;experience,&quot; &quot;challenge and rigor&quot; of it all for myself</td>
<td>&quot;It is my life. I don't do much else,&quot; few other hobbies and interests. &quot;This is where I've chosen to invest.&quot; &quot;Still days where I want to be principal,&quot; &quot;don't want to be an administrator anywhere else and leave now.&quot; &quot;Don't want to start over,&quot; some days &quot;happy where I am,&quot; &quot;I love it,&quot; &quot;desires support/opportunities to grow, a mentor;&quot;</td>
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<td>Karen</td>
<td>SLCC</td>
<td>INST: Scheduling teachers, student concerns about teachers, analyzing and interpreting data, monitoring overall academic program (CTE competencies, licensure, certification), addressing admin concerns about teachers* ORIG: student discipline, locker distribution,* program recruitment, supplies, building school community, fundraising, parent communication</td>
<td>&quot;Leading the program you develop a vision.&quot; &quot;Get the right people to help you meet that goal.&quot; &quot;Extra staff I elected to do...to help us become a better program.&quot; &quot;Getting the right teachers, academic teachers in the program.&quot; &quot;Advocating&quot; for teachers and students; &quot;file that line&quot; between teachers and admin; &quot;just a coordinator&quot; not an admin. &quot;We (SLC) are teachers too.&quot; &quot;We're in the middle management,&quot; &quot;politician.&quot;</td>
<td>Doesn't think TL influences teaching, &quot;when I'm a teacher, I'm a teacher&quot; (switches hats); teaching &quot;suffers, feels &quot;guilty,&quot; &quot;spread thin,&quot; &quot;hard to do both,&quot; no consistent block of time means constantly &quot;switching hats.&quot; &quot;My time that would be spent on lessons is spent on SLC work.&quot; &quot;I'm not used to evaluations that don't have 8s.&quot;</td>
<td>Believes this direction of influence comes from his passion for CTE—&quot;sees/knows CTE teachers are &quot;dysfunctionalized&quot; so I &quot;fight for&quot; my teachers (evaluations one ex).</td>
<td>&quot;I'm in here in the trenches, and I'm working with kids...seeing what my teachers are doing...And, they are up there making those decisions that are really hurting all the programs.&quot;</td>
<td>&quot;Scared&quot;/&quot;petrified&quot; leading adults, felt others had more experience &amp; knowledge; business ownership gave &quot;confidence in leadership.&quot; &quot;Was calling the shots, thinking &quot;big picture.&quot; 1st school mentored students; built program for another school (5th year); understood the teachers and the students. (CTE), felt others managed but didn't lead the program; no one &quot;standing up to do it...somebody needed to do it.&quot;</td>
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