Informal instructional teacher leaders: How principals can support them and their effect on instructional reform:

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INTRODUCTION

The current trend in elementary education is to improve and differentiate instruction through various reform efforts initiated to meet the demands of the No Child Left Behind Act (NCLB) of 2001. Particular emphasis is given to increasing student achievement by ensuring that scientifically research-based methods are used. Along with this task, instruction must be differentiated to meet the needs of all the diverse learners within the classroom, and their needs must be monitored with current data to support progress. This is a lot to accomplish as teachers are juggling with increasing number of English language learner (ELL) students, more demanding administrative tasks, and pressure from state exam results. In short, today’s elementary principals and teachers are drowning in a sea of outside pressures that often leave them feeling inadequate and overwhelmed. As a result of the increasing demands, many districts are instituting numerous change initiatives concomitantly to meet the challenges.

Nascent research (Crowther, Kaagan, Ferguson, & Hann, 2002; Harris & Muijs, 2005; Katzenmeyer & Moller, 2001; Liebermen & Miller, 1999) informs us that teacher leadership, and more specifically instructional teacher leaders, can have a significant impact on school improvement efforts. Informal instructional teacher leaders are not assigned positions; they earn leadership by working to improve instruction, sharing their knowledge with the staff and the community to build the instructional capacity of the school. In order to achieve success, teacher leaders rely on their principals to support and promote their work (Zepeda, 2003).

This case study involved three elementary schools of a regional district where teacher leaders are typically informal and often bound to a particular reform initiative. Due to the increasing need for instructional teacher leaders at the elementary level (Mangin, 2008), the study examined how elementary principals can encourage and support teacher leaders. The study also examined how the administrators and the teacher leaders are holding the remainder of the staff accountable for the new learning. Finally, the study attempts to determine if the transfer of knowledge is evidenced in the classroom to improve instruction. The research follows an instructional reform initiative of Response to Intervention (RTI) as it manifested from the principal leader to the staff via the teacher leader.

Federal laws have expectations for schools to attend to educating diverse groups of students successfully. This includes NCLB and the Individuals with Disabilities Education Improvement Act of 2004 (IDEA). NCLB aims to ensure the academic growth of all students. IDEA is the federal mandate for schools to provide all children with disabilities a free and appropriate public education in the least restrictive environment. IDEA also includes revisions with implications for general as well as special education students. These revisions encourage the implementation of research-based interventions that facilitate success in the general education setting for a broad range of students. School districts are encouraged to use the process of Response to Intervention (RTI) as part of their identification procedures for learning disabilities. RTI involves providing scientific research-based instruction and intervention matched to student needs, with important educational decisions based on students’ level of
performance and learning rates over time.

The school district participating in this study had their RTI plan in place as of June 2009, and began to implement SRBI in the three elementary schools during the 2008-2009 school year. The goals for the 2009-2010 school year were to continue the initiative of employing RTI strategies to meet the needs of individual students by linking the implementation data with specific instructional interventions, as well as tracking student progress in an efficient and timely manner, so that when analyzing the results over time there will be a clear assumption of the fidelity of instruction. The district expectation was that regular education teachers will meet with their RTI grade level data teams and support staff on a consistent basis to discuss common issues and concerns as they move forward to integrate the program successfully. The principals of the three schools identified one primary grade teacher leader and one peer teacher for the teacher leader to support towards the RTI reform efforts.

Principal’s Role

The research of Crowther, Ferguson, and Hann (2009) noted that development and sustainability of teacher leadership is inseparable from strong principalship and that supportive systemic frameworks need to be established for this model to work. The paradox of teacher leadership is that it requires administrative leadership to be effective (Smylie, Conley, & Marks, 2002). Elmore (2000) describes the cultivation of knowledge and enhancement of skills for the staff as the most significant role of the administrator. The misconception that the principal leader needs to retain all the leadership “power” within a school is, at present, a dangerous one, and at odds with moving an organization forward in its efforts towards school improvement.

It is widely accepted that strong administrative leadership is critical to a school’s growth and success (Waters, Marzano, & Mcnulty, 2003). It is now equally understood that principal use of teacher leaders is also crucial to the success of school reform (Buckner, 2000; Childs-Bowen, 2000). Elmore (2000) describes the principal’s role as predominantly about enhancing the skills and knowledge of people in the organization, and creating a common culture around the use of those skills and knowledge. Principals are the formal leaders of the school, but they recognize that they cannot institute school improvement plans on their own, they need the help of teacher leaders.

Changing Times/Changing Leadership

Leaders are often described as those people who walk ahead, people who are genuinely committed to deep change in themselves and in the organizations they work for. They lead through development of new skills and understandings. We now know that they also come from many places within the organization (Senge, 1996).

Today’s principal leaders need to activate the potential instructional teacher leaders on their staff to help them lead the remainder of the staff to effect reform. Zepeda (2003) informs us that through teacher leadership teachers learn how to nurture fellow teachers in teacher leadership roles, support the educational programs, and undertake shared decision making with the administration. Katzenmeyer and Moller (2001) write about the impetus of giving potential teacher leaders the opportunity to lead. They further suggest that the teacher leaders within an organization have the unique potential to improve not only the range of change, but also the pace.
Instructional Reform

In order to build a culture of improved instruction the leadership must be cognitive of the existing culture of the organization and use the long-term established ethos to institute change, and when change is proposed, justify the ends and procedures towards those goals using an aligned educative philosophy. Educative leadership implies a responsible understanding of the politics of an organization (Macpherson, 1992). In an egalitarian culture the opinions of peers are important to teachers and negative comments may work to stop their initiatives (Moller & Katzenmeyer, 1996). Teacher leaders as peers with the other teachers in the organization have the advantage of being on equal footing, as well as understanding the prevailing culture of the school. This advantage cannot be underestimated in value when thinking in terms of potential impact or perceived credibility.

Crowther et al. (2009) informs us that “the construct of teacher leadership has not yet been subjected to research interrogation where ‘contingencies’ associated with task, relationships, and context are the focus” (p. 17). Determining what relational factors can support emerging teacher leaders and help facilitate the transfer of knowledge from these instructional leaders to the remaining faculty is critical to transformational reform efforts. Perhaps more informative, is the notion that the teacher leaders themselves may have a particular time of need, and then later be replaced by other teacher leaders in possession of a new expertise or talent. Teacher leadership, particularly in the role of instructional leader, may best be implemented with a revolving door of leaders and potential leaders in the school, or the school district. Adopting a collective responsibility to a school wide pedagogy is at the heart of instructional transformation (Senge, 1996). Teacher leaders can be instrumental in identifying and instructing the preferred pedagogical methods. Teacher leaders can ensure that the pedagogical priorities are in sync with the reform models.

Teacher Leaders as Change Agents for School Reform

Currently school reform has become less narrow in scope and more nebulous in content (Mangin & Stoelinga, 2008). Improving higher-order thinking abilities, or including 21st century skills in curricula design are some common reform guidelines of today’s schools. These concepts may be unclear to certain members of the school community, and as a result long-term planning has become challenging to define and disseminate (Cohen, McLaughlin, & Talbert, 1993). School improvement plans are often multi-faceted and combine several instructional practices concurrently. As a result, teachers may be left feeling inadequate and under-trained to meet the new demands. Hargreaves and Goodson (1999) inform, the different directions of change can seem conflicting and are often contested. While schools’ management has become more decentralized, curriculum and assessments have become more centralized. This contrast may lead to confusion, have negative effects on the reform initiatives, and could possibly hamper teacher and student learning (Harrison & Lembeck, 1996). York-Barr and Duke (2004) learned that teachers who become directly involved in the reform process at the ground level, and then follow through with the initiatives to remain invested in the change, are less likely to feel like passive victims. It stands to reason that involving employees in a process that purports to change their job requirements is just good business sense, particularly when we know that teachers are often the sole proprietors of their classroom, and the desired change will ultimately need to manifest itself in that setting.

METHODOLOGY
The single case explanatory study of the three elementary schools of a regional school district examined the relationship between the principal, a designated teacher leader, and a peer teacher in three elementary schools, in attempt to learn more about the relational factors that may work to inhibit or support instructional reform efforts. Qualitative analysis procedures were used to analyze data from the interview transcripts, the observational field notes, and documents related to the implementation of the SRBI reform. Two sets of interview transcripts from the nine participants were used along with two sets of observational field notes of the school’s RTI meetings, the grade level team meetings, and classroom observations of the three participating schools. The multiple sources of varied data worked to establish a chain of evidence that helped to construct the validity of the study. All of the data were reduced using a process of coding, memo writing, categorizing, and thematic identification (Anfara, Brown & Mangione, 2002).

Research Questions

1. How can elementary principals effectively recruit, encourage, and support instructional teacher leaders?

2. How are teacher leaders sharing their instructional expertise with the staff?

3. How are administrators holding teacher leaders accountable for the new learning?

4. How are teacher leaders holding their peers accountable for the new learning?

5. Is the transfer of learning evidenced in the classroom?

The purpose of the research questions was to learn more about the conditions that will ultimately support teacher leaders in these demanding roles, as well as defining the characteristics of supportive relationships between teacher leaders and their principals in the elementary school setting. The research was also designed to learn more about the transfer of knowledge element of instructional teacher leaders, which has been difficult to ascertain through previous studies (York-Barr & Duke, 2004).

Results of this Inquiry

The results of coding these data are presented in three iterations of analysis. The first iteration allows for initial codes and surface content to be identified from the three categories of data: observations, documentation, and interviews. During the second iteration the major themes from the data were identified. Table 1 is a matrix to support that each of the findings was supported by more than one data source. The third iteration provides a synthesis of those themes in direct response to the research questions of the study.

Third Iteration: Application to Data Set

Teacher leaders can be effective agents to institute and support instructional reform efforts when there is a shared understanding of goals between the principal and the teacher leader and when accountability measures are employed by the principal to hold the staff responsible for the new learning.
Discussion of the Findings

The research regarding the use of teacher leaders to help implement instructional reform is twofold. In regard to teacher leaders’ ability to act as agents of change in parallel leadership with their principal, the research appears clear. Principals that establish focused goals to meet the immediate needs of the reform, and clearly communicate those goals to the teacher leaders, enable the teacher leaders to effectively implement the goals to the remainder of the staff. Teacher leaders are able to hold their peers accountable for the new learning only if the accountability measures are first established by the principal, and included as a component of the initial reform goals. The research also supported that schools with established professional oriented cultures and established meeting protocols were more successful implementing the organizational aspects of the reform. This management system allowed for the teacher leaders to lead their peers independent of the principal, and hold their peers accountable towards the reform efforts.

This study implies that administrators may need to address the quality of the Professional Learning Communities (PLCs) in their

<table>
<thead>
<tr>
<th>1A Shared Mission</th>
<th>2A Established Learning Community</th>
<th>3A Knowledgeable Instructional Leadership</th>
<th>4A Principal in Parallel Mission With the Teacher Leader</th>
<th>5A Clear Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1B Principal Confirmation</td>
<td>2B Autonomy vs. Professional Learning Community</td>
<td>3B Team Meetings Valued</td>
<td>4B Accountability Measures Established</td>
<td>5B Data Driven Instruction</td>
</tr>
<tr>
<td>1C Established Group Norms</td>
<td>2C Professional Dialogue Valued</td>
<td>3C Internal Responsibility</td>
<td>4C Professional Dialogue</td>
<td>5C Student Achievement</td>
</tr>
</tbody>
</table>

FIRST ITERATION: INITIAL CODES/SURFACE CONTENT ANALYSIS

1A Administrator/TL shared mission
1B Teachers feel supported by the principal
1C Principals establish meeting protocol
1C Principal kept meeting focused
1C Principal sets clear expectation for grade level and support teachers

2A Autonomy vs. PLC
2B Forums to share established before new initiative
2C Professional dialogue valued
2C Informal and formal opportunities for professional dialogue

3A Goal setting is aligned with district/school/team
3A Principal is an active participant in the learning process
3B Accountability measures are in place to track progress of goals
3C Principal has expectation for follow up

4A Mutual professional respect
4B Peer teacher values the TL support/knowledge
4B Data is valued as a resource for planning
4C Established culture of sharing methods

5A Peer teacher understands what is expected
5A There is a learning objective in place
5B Methods of the reform are instituted and practiced
5B Evidence of reflection/refinement of goals
5C Peer teacher shares examples of student success

Table 1

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<th>Theme: Shared Mission</th>
<th>Source of data</th>
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<td>Major finding</td>
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**Theme I: Shared Mission**

1. The principal’s ability to communicate specific SRBI implementation goals resulted in a just translation of goals from the principal to the teacher leader. X X
2. Evidence of the translation of the reform goals was observable in the teacher’s classroom. X

**Theme II: Principal Confirmation**

3. Teachers that feel supported and encouraged by their principal are more likely to continue the reform efforts independently. X X
4. Teachers want to receive recognition for their efforts from the principal. X
schools before attempting to institute new instructional reform initiatives. Without a prescribed meeting protocol and agenda, the reform may lack consistency across the district. Each school could potentially be in different stages of the reform, and the district sharing would be limited because of this discrepancy. It was also apparent from this study that overall the team meetings led by the teacher leaders were more focused on the intent of servicing student learning goals by identifying RTI strategies and methods to achieve this important aspect of the reform. Principal-led meetings served more as a method of keeping track of student progress and to ensure that the student’s individual learning needs were being met, as well as encouraging the teachers and the support staff to work together to serve the needs of the at-risk students. Principals should be mindful of affirming their teacher leaders, to let them know they are valued, and that their mission is in sync. This affirmation works to build trust between the two leaders, which will be essential for working together on future school improvement goals. Teacher leaders were more comfortable sharing instructional strategies with their peers in informal settings. Without more established leadership roles such as lead teacher or team leader, teacher leaders may have difficulty actualizing the full potential of their teacher leadership role. This study suggests that teacher leaders were less comfortable sharing their

**Theme III: Group Norms**

5. When principals established group norms and valued the protocols, the meetings were focused on the reform efforts. X X
6. Principals that set clear meeting expectations for the group members were able to keep the meetings moving in the direction of the focus on achievement. X X
7. Schools that establish meeting protocols and adhere to them are more successful at staying on task during meetings. X X

**Theme IV: Established Learning Community**

8. Schools that have established PLCs and cultures built on sharing appear to be more successful in their initial reform efforts. X X
9. Schools that are more accustomed to having professional dialogue to improve student learning appear to be more successful instituting SRBI. X

**Theme V: Knowledgeable Instructional Leadership**

10. Principals who help to establish learning goals for the school in a collaborative process are more successful in their reform mission. X X
11. Principals that actively participate in discussions about student learning and provide specific guidance appear to have more success with the reform. X X

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**Theme VI: Team Meetings Valued**

12. Principals that keep track of the student progress data are more active participants in the meeting process. X X X
13. The example set by the principal is followed when the principal is absent (grade level meetings). X X

**Theme VII: Internal vs. External Responsibility**

14. Principals that hold teachers and staff members accountable for the reform efforts are more successful with instituting the reform. X X X
15. Principals that set expectations for follow up are more successful with the reform efforts. X X X

**Theme VIII: Principal in Parallel Mission With the Teacher Leader**

16. Teacher leaders that have a strong supportive professional relationship with their principal feel more successful with the leadership role in the reform efforts. X X
17. Teacher leaders that trust that the principal mission is aligned with theirs are more confident that they will be successful implementing the reform. X

**Theme IX: Accountability Measures Established**

18. Peer teachers that acknowledge professional respect for the teacher lead value their suggestions/guidance. X X
19. When data sources are used to validate instructional decisions, peer teachers are more likely to implement the prescribed interventions. X X

**Theme X: Opportunities for Professional Dialogue**

20. Schools that practice frequent formal and informal professional sharing are more likely to be successful instituting instructional reform. X X

**Theme XI: Clear Reform Expectation**

21. Peer teachers that have a clear understanding of the reform goals are more likely to be successful implementing SRBI. X
22. When systems are in place to track student progress there is a more
expertise vertically throughout the school. Principals will need to encourage more school-wide sharing so that it can become more of a mainstay to the existing professional culture.

In regard to the teacher leader transfer of knowledge being actualized in the classroom, there appears to be a possible disconnect between strong leadership practice and the results in the classroom as a product of that leadership. This research suggests that it may be wise to add an evaluation component to the RTI reform initiative to ensure a just translation of the instructional goals. Explicit teaching models will help to avoid misinterpretation of the intent of the initiative. Figure 1 highlights the necessary components of this leadership model working together to improve the instructional practice in the classroom.

Figure 1. Framework for teacher leadership: Factors of instructional capacity building. This instructional teacher leader model requires the principal and the teacher leader to be equally effective, independent of each other, in their combined mission. Without the investment of both parties the model will break down, and ultimately fail. But if learning, individual and collective, is the central responsibility of leaders then they must be able to model the learning they expect of others. Leaders should be doing, and should be seen to be doing, that which they expect or require others to do. Likewise, leaders should expect to have their own practice subjected to the same scrutiny as they exercise toward others. If the principal lacks a strong understanding of how to support and encourage instructional teacher leaders, their school may not be achieving its full learning capacity.

References


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