

JOB-RELATED STRESS AND BURNOUT IN CHARTER SCHOOL LEADERS:  
A TRANSCENDENTAL PHENOMENOLOGICAL STUDY

by

Jamie Douglas McKay

Liberty University

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APPROVED BY:

Kenneth R. Tierce, Ed.D., Committee Chair

Lisa Foster, Ph.D., Committee Member

Martha Martin, Ed.D., Committee Member

## ABSTRACT

The purpose of this transcendental phenomenological study was to understand the impact of stress and burnout on charter school leaders in the western United States. The research questions were designed to understand how the role of charter school leadership impacts stress and burnout for charter school leaders. The theories guiding this study included the managerial stress cycle theory, and the multidimensional theory of burnout. While existing research has documented the stressors of traditional public-school administrators, little research has explored the distinctive challenges faced by charter school administrators. Data collection included individual interviews, a focus group interview, and observations. The identification of themes came from the reading and coding of the transcriptions using qualitative analysis software to discover the essence of stress and burnout as experienced by charter school leaders. The causes of stress and burnout described by participants included relationships with local school boards, maintaining student enrollment, and the broad scope of the job of charter school leader. Participants indicated job-related stress and burnout negatively impacted personal and professional relationships, job performance and satisfaction, and physical and mental health. Participants reported periods of chronic stress leading to incidents of burnout.

*Keywords:* burnout, charter schools, coping, school leadership, stress

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**LIST OF ABBREVIATIONS**

Administrator Stress Index (ASI)

Adequate Yearly Progress (AYP)

Elementary and Secondary Education Act (ESEA)

Every Student Succeeds Act (ESSA)

Free or Reduced Price Lunch (FRL)

Local Education Agency (LEA)

Maslach Burnout Inventory (MBI)

National Commission on Excellence in Education (NCEE)

National Defense Education Act of 1958 (NDEA)

No Child Left Behind Act of 2001 (NCLB)

Science, Technology, Engineering, and Mathematics (STEM)

## **CHAPTER ONE: INTRODUCTION**

### **Overview**

Chapter One offers an introduction and framework for this study. Included in the introductory chapter is a background of charter schools, in terms of historical, social, and theoretical contexts; the importance of effective leadership on student outcomes and an overview of the stress of school leadership; and the contextualizing of stress and burnout in the principalship within the differences between the roles of traditional district school principals and charter school leaders. My own situation as the researcher, in terms of how life experiences may color the personal perception of the study, are explained. The problem statement, purpose, significance of this study, the research questions, and important definitions complete this chapter.

### **Background**

The phenomena of job-related stress, the stress of serving in a leadership role, and more specifically as the leader of a traditional public district school have been the focus of numerous studies since the early 1980s (Barker, 1995; Beusaert, Froehlich, Devos, & Riley, 2016; Brimm, 1983; Carr, 1994; Friedman, 1995; Gmelch, 1982; Ripley, 1997; Sarros, 1988; Swent, 1983; Tanner & Atkins, 1990; Thornton, 1996). Numerous studies have investigated the impact of school leadership on student outcomes (Allen, Grigsby & Peters, 2015; Dutta & Sahney, 2016; Khan & Shaheen, 2016; Leithwood, Louis, Anderson, & Wahlstrom, 2004; Levine, 1993; McLeskey & Waldron, 2015; Nettles & Herrington, 2007; Soehner & Ryan, 2011; Sun & Leithwood, 2015). However, few studies have focused on the impact of stress and burnout on charter school leaders as viewed through the lens of their lived experiences. This study extends the existing research on stress and burnout in school leaders by broadening the understanding of

how the distinctive stressors facing charter school leaders impact their professional and personal lives, thus impacting the many thousands of charter school students. This study could help charter school leaders to mitigate the impact of stress. In addition, the findings could help shape the content and structure of school administrator preparation programs that prepare educators for the role of charter school leadership.

### **Historical Context**

The history of education in the United States is a story of federally initiated reforms (Finn, 2008; Kay, 2013; Wissehr, Concannon, & Barrow, 2011). Before the Second World War, education in America was varied across the population, most often dependent upon socioeconomic circumstances (Finn, 2008). Upper class families sent children, mostly boys, to private schools, pipelines to higher education at preeminent universities (Finn, 2008). Middle class students attended the public primary schools in neighborhoods where they lived, and families who could afford for children to remain outside the work force allowed students to advance to high school (Finn, 2008). The working-class families of factory workers and farmers attended primary school, but did not often advance further (Finn, 2008).

After the post-war population boom, most families assumed their children would complete a high school education, and college attendance became more commonplace (Finn, 2008). In response to this social expectation, a presidential commission encouraged the increased creation of community colleges and state university programs, which was an early instance of federal influence in local public education (Finn, 2008). Impacting American education as a system were two momentous events in the 1950's that brought the federal government further into local public education: the 1954 *Brown v. The Board of Education*

decision, which ended *de jure* racial segregation in the nation's public schools, and the launch of the Soviet satellite *Sputnik* in 1957 (Finn, 2008; Kay, 2013; Wissehr et al., 2011).

The Soviet launch of Sputnik before any U.S. satellite fostered wide-spread concern that as a world leader, the United States was inadequately educating students in mathematical and scientific knowledge and ingenuity (Finn, 2008; Kay, 2013; Wissehr et al., 2011). The Soviet launch was a national emergency, prompting congress to pass the National Defense Education Act of 1958 [NDEA] (Flynn, 1995). Legislators believed it was imperative to the security of the nation to improve the educational outcomes of America's youth (Flynn, 1995). Large sums of federal money went into the educational system to improve equipment, facilities, and teacher training, and with these newly appropriated funds came new federal mandates (Kay, 2013; Wissehr et al., 2011). Schools assigned students to tracks based upon their apparent aptitudes, sending them through an educational path which led to college, vocational school, or into the workforce (Finn, 2008). Though public education ran smoothly in this system, Finn (2008) noted that critics during the middle of the 20<sup>th</sup> century initiated the discontent that resulted in the school choice movement.

### **Social Context**

In the 1950's, Harvard University professor Milton Friedman called for federally issued education coupons for low-income families to fund their children's education at any school they selected (Friedman, 1955). The Economic Opportunity Act of 1964 was an integral part of Lyndon B. Johnson's war on poverty strategy, and instituted educational programs such as Head Start, Job Corps, Upward Bound, and Volunteers in Service to America (Finn, 2008). The United States Congress passed the Elementary and Secondary Education Act of 1965 (ESEA) and the Higher Education Act of 1965 (HEA), authorizing vast sums of federal aid for public education,

ushering in 40 years of complex regulations, intricate funding plans and confusion (Finn, 2008). Reauthorization of the ESEA has occurred several times and it remains the framework for federal influence in public education, with its most recent iterations being the No Child Left Behind Act (2001), and the Every Student Succeeds Act (ESSA) of 2015.

In 1983, Ronald Reagan commissioned an investigatory body, the National Commission on Excellence in Education (NCEE), which published *A Nation at Risk* in 1983. This highly publicized report described a perceived failure of American public schools. Since then, concerted efforts at the federal level to revive American schools have intensified (Junge, 2014).

Legislators have called for alternatives to traditional public schools based on parental choice, school and teacher autonomy, and school accountability (Barr, Sadovnik, & Visconti, 2006; Junge, 2014; Witte, Shober & Schlomer, 2007). First authorized in Minnesota in 1991, charter schools became popular as alternative schools, and were specifically included in the reauthorization of the ESEA, the No Child Left Behind Act of 2001 (NCLB) as an option for failing schools (Bulkley, 2011; DeLuca & Wood, 2016; Hill, 2016; Junge, 2014).

According to the McFarland et al., for the Center for Education Reform [CER] (2015), since the initial charter school authorizations in Minnesota in 1991, legislation in 43 states and in the District of Columbia has allowed for the creation of charter schools. Initially intended to be the testing grounds for innovative teaching models, charter schools receive a contract (a charter) from an authorizing agency to function as a public school, and to some extent are released from certain regulations governing traditional public schools (Bulkley, 2011; Junge, 2014). In return for this limited autonomy and flexibility, charter schools are held accountable for student outcomes and charter agreement goals set in cooperation with the authorizing organization, often

state boards of education, school districts, or sponsoring universities (Goff, Mavrogordato & Goldring, 2012; Junge, 2014).

Charter schools receive authorization to operate as public schools, and to receive public funding (Junge, 2014; Karanovich, 2010). Authorizers bestow charters for periods that most commonly range between three and five years; if charter schools do not achieve the goals agreed upon with the authorizer, schools can be, and have been, shut down (Karanovich, 2010). Junge (2014) described the underlying rationale for awarding charters for short periods, noting that closing failing charter schools quickly is a key component of the school improvement initiative.

In return for this increased accountability, charter schools are free to implement innovative or non-traditional curricula or instructional methods (Bulkley, 2011; De Luca & Wood, 2016; Hill, 2016; Junge 2014). As such, there is a wide variety of charter schools, with a broad range of concentrations, including STEM/STEAM, the arts, Core Knowledge, EL Education (formerly Expeditionary Learning), online learning/flipped classroom, American history, and minority heritages (De Luca & Wood, 2016). As Bulkley (2011) succinctly explained, charter schools are not one type of school, but rather an empty structure within which founding members can create whatever kind of school they believe is best.

### **Theoretical Context**

The theories guiding this study were the managerial stress cycle theory (Gmelch, 1983), and the multidimensional theory of burnout (Maslach, 1998). The managerial stress cycle theory was designed specifically with educational leaders in mind. The cycle is comprised of four stages. In stage one, a stressor is manifested in the work environment. In stage, two the school administrator appraises the stressor. This appraisal compares the demands of the stressor with the

available resources at hand to address the stressor. In the third stage, a plan is devised and attempted. Stage four considers the long-term consequences of exposure to stress over time.

The Maslach (1998) multidimensional theory of burnout is well established in the literature concerning burnout among traditional public-school leadership, as burnout occurs most often in professionals, like principals, whose jobs requires working intensely with and for people (Maslach & Jackson, 1981). The multidimensional theory of burnout (Maslach, 1998) ties to the managerial stress cycle theory (Gmelch, 1981) in stage four of the cycle, consequences. If the stress coping resources consistently prove deficient to meet a string of stressors over time, burnout is the consequence. Burnout is most common in the helping professions such as healthcare and education (Maslach, 1998). Burnout manifest in three categories: physical and emotional exhaustion, resentment and cynicism toward people (clients), and a greatly decreased sense of achievement and self-efficacy.

These two studies have specifically described traditional public-school principals' experiences with stress and burnout (Boyland, 2011; Combs, Edmonson & Jackson, 2009; Federici & Skaalvik, 2012). As Gmelch and Torelli (1994) noted, research shows that self-efficacy and stress are closely related. To underpin the managerial stress cycle theory, Gmelch (1983) draws significantly from self-efficacy theory (Bandura, 1977) as it ties into the study of stress and leadership. Bandura (1977) described self-efficacy as an individual's beliefs concerning their ability to impact events that affect their lives. When self-efficacy is high, individuals feel that situations are less stressful, whereas when confronted with obstacles in times of low self-efficacy, situations appear more stressful (Gmelch, 1994).



### **Situation to Self**

I have spent eight years as the director of public charter schools in Utah. I have worked in private schools, international schools, and traditional public schools. I have worked in four different charter schools, as both a teacher and as an administrator, experiences that leave me with the bias that charter school leadership is a difficult, stressful profession. I have experienced the strain of running charter schools (schools of parental choice) in the current climate of high stakes testing and increased school accountability. Not being part of a district, I have felt isolated, with few opportunities to connect with other school administrators. I was curious to discover what stressors other charter school leaders experience in their jobs, and what coping strategies they may have found to be helpful in meeting the challenges of the profession, avoiding burnout. Being aware of the biases I hold concerning charter school leadership, I kept a reflective journal to monitor my thoughts and feelings concerning my own experience with stress and burnout as a charter school leader. I revisited this journal while analyzing the data and mindfully bracketed my experiences aside to understand the experiences of participants without bias. I used the journal and reflection to bolster my intentionality, my explicit effort to bracket my own preconceptions and distill the pure description of participants perceived experiences.

Ontologically, this study exhibits a social constructivist viewpoint, reflecting my belief that multiple realities surrounding the phenomenon exist as perceived and explained by the various participants, along with the epistemological assumption that participants' subjective experiences form the basis of their perceived reality (Creswell, 2007; Moustakas, 1994).

Axiologically, I anticipated my own experiences would be like those of the participants. I hoped that considering their perceptions would offer a broader understanding of the experiences of charter school leaders, including my own experience.

## **Problem Statement**

The problem of this study was the job-related stress and burnout of charter school leaders in the western United States, a phenomenon with the capacity to degrade educational outcomes for charter school students across the county. Prevalent researchers in the study of school leadership have noted a gap in the literature regarding the phenomenon of stress and burnout in charter school leaders (Anderson, 2011; DeSimone, 2013; Smith & Kovacs, 2011, Sun & Ni, 2016). Research has offered an understanding of the stressors and coping strategies of traditional public-school principals (Boyland, 2011; Combs, Edmonson & Jackson, 2009; Federici & Skaalvik, 2012). A review of the current literature, however, showed that scant research has focused on understanding the unique challenges which create stress and burnout for leaders of charter schools, or how they meet those challenges. This gap in the literature is revealed in extant research as needing future study (Bickmore & Dowell, 2014; Blitz, 2011; Cravens et al., 2012; Goff et al., 2012).

The responsibilities of a charter school leader can differ significantly from their traditional district school counterparts. Charter school leaders often face challenges with facility management, fundraising, and negotiating with a central office, all within the boundaries of a district they are not part of (Goff et al., 2012). Charter schools function without the district supports that traditional public schools routinely receive (Bickmore & Dowell, 2014). This study sought to collect the stories of charter school leaders and to understand their experiences with job related stress and burnout.

The impact of successful school leadership on student achievement is significant (Drysdale, 2011, Leithwood, Patten & Jantzi, 2010; Nettles & Herrington, 2007; Sun & Ni, 2016). Drysdale (2011) described the traits of a successful school leader as passion, optimism,

enthusiasm, persistence, determination, assertiveness, openness, candor, and self-efficacy. The mental effects of stress and burnout make maintaining these productive behaviors and attitudes increasingly difficult (Leithwood et al., 2004; Leithwood et al., 2010; Maslach, 1998). A failing in leadership can produce disruptions in culture and climate across an entire building, impacting teacher performance and student achievement in disastrous ways (Phillips & Sen, 2011; Witziers, Bosker, & Kruger, 2003).

### **Purpose Statement**

The purpose of this transcendental phenomenological study was to understand the impact of stress and burnout on charter school leaders in the western United States. This study was undertaken to comprehend the aspects of charter school leadership that charter school leaders identify as causes of job-related stress and burnout. This study was also designed to gain understanding of the coping strategies charter school leaders identified as helpful in dealing with the impact of stress and burnout. For the purposes of this research, charter school leader stress and burnout were generally defined as the negative physical and emotional effects of job-related stress and burnout described by charter school leaders. For the purpose of this research, charter school leaders were identified as educators who had served as the head administrative officer of a public, not-for-profit charter school, a role for which titles vary, including chief administrator, chief executive, dean, director, and head-of-school (Blitz, 2011).

### **Significance of the Study**

The impact a school leader has on student success is significant (Leithwood et al., 2004; Leithwood et al., 2010; Nettles & Herrington, 2007; Sun & Ni, 2016). Furthermore, school leadership is an increasingly complex, difficult, and stressful job (Andreyko, 2010; Boyland, 2011; Drago-Severson, 2012). The school leader is accountable to many constituencies,

including students, families, teachers and staff, board members, and state and federal officials. In theory, each of these factions may understand that a work-life balance is necessary for school leaders, yet in practice, each group often considers its own needs as unique and privileged, expecting the administrator to be constantly available at any time (Holmes, 2016). In this era of constant access, high stakes testing, standards-based reform, school accountability and widespread financial difficulties, the documented stressful nature of the position is making it hard to find and keep good school principals. (Coelli & Green, 2012).

In a theoretical sense, understanding the stress of charter school leadership could help administrators identify strategies to mitigate the negative impacts of stress and burnout. This is necessary for charter school leaders to avoid the performance-degrading effects of burnout, improving leader success, thus increasing student success. While existing research explored the principalship of traditional public schools, there is little research concerning public charter school leaders. With more public charter schools opening across the nation annually, it becomes more important to understand how to support the leaders of these alternatives to traditional public schools, as their performance impacts a population of students which is growing every year. The practical significance of this study rests in the attempt to increase the understanding concerning charter school leader's experiences with stress, burnout, and their coping strategies.

Examining the practical significance of this study, it is key to note that despite similarities between the two positions, the duties and responsibilities of traditional public-school principals and public charter school leaders differ meaningfully (Bickmore & Dowell, 2011; Bickmore & Dowell, 2014; Campbell & Gross, 2008; Cravens et al., 2012; Goff et al., 2012). Blitz (2011) noted that without a central office, charter school leaders are responsible for duties that in traditional district would be taken care of by district personnel outside the school. Charter

school leaders are part building principal and part superintendent, giving them more autonomy and more responsibility. (Blitz, 2011). As schools of choice, charter schools must be more attuned to the demands of the market and the needs and desires of consumers, who in this case are parents and students (Blitz, 2011). Mindful of market forces, charter leaders must also find funding and other resources, garner support from the community, and market to families to grow enrollment, tasks which traditional district principals may not deal with (Portin, 2003).

Given these differences in roles, this research concerning charter school leaders' experiences, challenges and strategies for success can hopefully further the body of knowledge. Practically, this may help leaders of charter schools to manage stress, avoid burnout, and be effective in their jobs in a sustainable way. Effective leadership is important for school and student success, and a leader who suffers poor physical or mental health could have a tremendously negative impact on the whole school community (Phillips & Sen, 2011). Empirically, the connection between effective leadership and successful students is clear (Leithwood et al., 2010; Nettles & Herrington, 2007; Sun & Ni, 2016). Numerous studies have investigated the importance of effective school leadership for positive student outcomes (Allen et al., 2015; Dutta & Sahney, 2016; Khan & Shaheen, 2016; Leithwood et al., 2004; Leithwood et al., 2010; Levine, 1993; McLeskey & Waldron, 2015; Nettles & Herrington, 2007; Soehner & Ryan, 2011; Sun & Leithwood, 2012). While measuring the effects of charter leader stress on student outcomes is outside the scope of this study, helping charter leaders manage stress and avoid burnout to remain effective may improve outcomes for a broadening population of students, and may inform the improvement of administrator preparation programs, which to date ignore many of the unique challenges of charter school leadership (Blitz, 2011). The present study will expand the understanding of administrative stress to include a quickly growing

subgroup of that population, namely charter school leaders. This will increase understanding across the studies of stress and burnout in complicated administrative occupations, to include both the physiological and psychological effects of stress and burnout as individually described by the participants.

### **Research Questions**

The following research questions guided this transcendental phenomenological study of the impact of stress and burnout on charter school leaders in the western United States:

#### **Research Question One**

What aspects of their employment, if any, do charter leaders in the western United States perceive as causing stress and burnout?

Boyland (2011) noted that the principalship has long been described as an extremely difficult job, one that gets increasingly stressful over time. Another study concluded that being a principal is consistently and relentlessly stressful (Combs et al., 2009). Understanding what charter leaders believe are the most stressful facets of their jobs, and why, should be useful and enlightening. Identifying themes in terms of recurring challenges and stressors may help to develop strategies which alleviate or avoid the consequences of job-related stress and burnout for charter school leaders.

#### **Research Question Two**

How do charter school leaders in the western United States perceive that job-related stress and burnout impact their professional lives?

In a study of district school principals Combs et al. (2009) described burnout as “emotional exhaustion, depersonalization, decreased personal accomplishment” and 8.8% of participants reported high levels of burnout, with 26.8% claiming moderate burnout levels (p.

12). Burnout leads to less effective work performance, low faculty morale and can cause disruption of the learning environment (Boyland, 2011; Combs et al., 2009; Gmelch & Torelli, 1994). Effective school leaders are critical to student success (Boyland, 2011; Lunenburg & Irby, 2014).

### **Research Question Three**

How do charter school leaders in the western United States perceive that job-related stress and burnout impact their personal lives and relationships?

Faced with job related stress, charter school leaders may develop unhealthy habits, such lack of sleep, lack of exercise, and increased alcohol consumption (Holmes, 2016). These habits intensify the already significant impacts of stress, and decrease a leader's capacity for thoughtfulness, empathy, rationality, and compassion (Holmes, 2016). Stress and burnout can lead to serious interpersonal concerns that could impact charter school leaders' personal lives and relationships (Boyland, 2011; Combs et al., 2009; Gmelch & Torelli, 1994).

### **Research Question Four**

How do charter leaders describe their strategies for dealing with stress to avoid burnout?

Boyland (2011) reported that extant research consistently shows that effective school leadership has a direct, positive influence on student outcomes, teacher performance, parental satisfaction and overall educational achievement. Considering how crucial principal performance is to school and student success, it is important to understand what strategies successful charter leaders believe help them manage stress and avoid burnout.

### **Definitions**

1. *Authorizers* - Authorizers are entities such as state boards of education or universities that have the authority to issue charters to public charter schools (Boyland, 2011).

2. *Burnout* - Burnout describes a state of emotional exhaustion, cynicism, depersonalization, and deteriorating performance due to long-term unresolved job stress (Maslach & Jackson, 1981)
3. *Charter Schools* - Charter schools are organizations granted a contract, or charter, to operate as a public school, funded by public capital (Bulkley, 2011; Junge, 2014).
4. *Coping* - Coping is using strategies and both internal and external resources to help manage the effects of stress (Lazarus & Folkman, 1984).
5. *Distress* - Distress is the negative response to stressors (Simmons & Nelson, 2001)
6. *Eustress* - The opposite of distress, eustress is the positive response to stress (Simmons & Nelson, 2001).
7. *Stress* - Stress is the process by which individuals react to demands or stressors in the environment (Lazarus & Folkman, 1984).
8. *Stressor* - A stressor is an event, object, or threat which causes stress (Simmons & Nelson, 2001).

### **Summary**

Effective school leadership is critical to student success (Boyland, 2011). Increasing pressure and demands can lead to stress and burnout, reducing the effectiveness of school leaders, threatening student outcomes (Boyland, 2011; Campbell & Gross, 2008). Existing research concerning the phenomenon of stress and burnout for principals of traditional district schools describes their perceived stressors and coping strategies. Charter school leaders, however, have not been the focus of many studies, and their roles and responsibilities can vary widely from those of traditional district principals. Therefore, to address this gap in the literature identified by prominent researchers, the purpose of this transcendental phenomenological study



was to understand the impact of stress and burnout on charter school leaders in the western United States (Bickmore & Dowell, 2011; Bickmore & Dowell, 2014; Campbell & Gross, 2008; Cravens et al., 2012; Goff et al., 2012; Ndoye, 2010).

## **CHAPTER TWO: LITERATURE REVIEW**

### **Overview**

Chapter Two of this study explores the theoretical framework of stress and burnout theories and establishes the importance of effective school leadership in promoting positive student outcomes. An outline of self-efficacy's role in stress follows with an exploration of its relationship to leadership style and stress levels. The pertinent research describing burnout syndrome and its impacts on health and performance is presented and placed within the context of educational and organizational leadership. The relationship between stress and health is presented, and the dangers of stress and burnout to school leaders and therefore their students is established. I examine the literature from research on the experience of stress of traditional public-school principals and highlight the documented differences in roles, demands and stressors between traditional public-school principals and charter school leaders, who face different challenges.

### **Theoretical Framework**

A great deal of the literature concerning stress in school administrators has its basis in the managerial stress cycle theory (Gmelch, 1983). Multidimensional theory of burnout is foundational in the study of stress and burnout among professionals who work serving other people, including educators (Maslach, 1998). There have been numerous studies which apply these two theoretical frameworks specifically to job-related stress and burnout in traditional public-school leadership (Barker, 1995; Beusaert et al., 2016; Brimm, 1983; Carr, 1994; Friedman, 1995; Gmelch, 1982; Ripley, 1997; Sarros, 1988; Swent, 1983; Tanner & Atkins, 1990; Thornton, 1996, Torelli & Gmelch, 1993; Washington, 1982). These extant studies looked to explore the causes of stress and burnout among traditional public-school principals, and to

identify ways to mitigate the impact that administrator stress and burnout have on many aspects of the school environment including: principals' health and well-being; the attitude, motivation, and job performance of teachers; and student outcomes. The current study expands the understanding of the causes and impact of job-related stress and burnout to include the growing population of charter school leaders in the western United States.

### **Managerial Stress Cycle Theory (Gmelch, 1981)**

Stress is a part of everyday life, and not all stress is harmful (Brimm, 2001). Selye (1976) differentiated between three related phenomena: stress, eustress, and distress. Selye (1976) described stress as the “non-specific response of the body to any demand placed on it” (p. 17). Distress occurs when the body becomes unable to cope with persistent demands, while eustress describes a level of stress that is ideal, in that it elicits optimal engagement and motivation (Beusaert et al., 2016). Simmons and Nelson (2001) described eustress, or good stress, as a psychologically positive reaction to a stressor. Research suggested that eustress improves performance and may provide various beneficial impacts on health and well-being, sparking biological response that increase motivation and maximize performance (Simmons & Nelson, 2001). Many studies have examined the phenomenon of work-related stress in many environments, including in the field of education (Blitz, 2011; Cravens et al., 2012; Goff et al., 2012).

Gmelch (1981) described a managerial stress cycle specifically for school administrators. Stressors are demands placed upon the administrator. Stage one begins with one or more demands being presented to the administrator. The demand could be a phone call from an angry parent or a change in board policy. In stage two, the administrator assesses the nature of the stressor against the resources available to address the demand. If physical or emotional resources

are deemed insufficient to meet the demand, stage three, the stress response, begins. As Gmelch (1981) explained, in stage three of the cycle, the body increases adrenaline production and the heart rate quickens, preparing the individual to ignore, flee, fight or mitigate the stressor. The fourth stage of the managerial stress cycle is consequences. Consequences are defined as the long-term effects of stress based on duration, frequency, and intensity of the stress response. Considering the long-term consequences of stress, Gmelch (1981) wrote that the effects of stress are cumulative over time and the consequences of accumulated stress synergistically worsen the negative impact on health and performance.

Gmelch (1981) classified probable stressors for school administrators into five categories (administrative constraints, administrative responsibility, interpersonal relations, interpersonal conflicts and role expectations). If new overlapping demands are presented constantly (stage one), each is appraised against available resources (stage two), triggering a new and concurrent stress response (stage three), and if administrators cannot learn to alleviate some of their job-related stress with coping strategies, the consequences (stage four) of chronic stress can include serious mental and physical health issues, to include burnout (Gmelch, 1981).

**Coping skills.** Coping skills can be learned, through techniques like modeling and role-play, and are worth the time and effort to develop, as success coping experience increase an individual's self-efficacy (Bandura, 1977, p. 196). Lazarus and Folkman (1984) describe coping as constantly assessing our available mental and physical resources against various environmental stressors as they present themselves. Two models of coping emerged in the early research concerning stress, adaptation, and emotion: the animal model of coping and the ego-psychology model (Lazarus & Folkman, 1987). The animal model described the most basic responses to a stressor, the behavioral responses of escape and avoidance, which Gmelch (1981)

listed as ignore, flee, combat, and alleviate. While these responses over time can lead to physical illness, Gmelch (1981) also added that a thinking response to stressors leads to “positive learning and productivity” (p. 11).

As opposed to the base animalistic response to stressors, the ego-psychology model of stress response centers on the thinking process involved in assessing the environment, managing base impulses, and dealing effectively with perceived stressors (Lazarus & Folkman, 1987). In this model, the function of coping becomes twofold: to address the discrepancy between the environmental stressor and the available resources, and to address and mitigate any negative emotional reaction (Lazarus & Folkman, 1987). Coping choices within the negative response framework, such as denial, are unhealthy, pathological, and neurotic; thinking, ego-psychological methods like flexibility, adaptation and humor are healthy, mature, and realistic (Lazarus & Folkman, 1987). Successful coping necessitates effort and planning, takes place over time, and without the guarantee of a positive outcome (Sogunro, 2012). The process, which determines healthy or unhealthy coping mechanisms comes in the Gmelch (1981) stress-cycle in the third stage, after triggering the stress response when an individual must choose how to respond (i.e. decide on a coping strategy).

Stress is a relational transaction between a person and the environment (Lazarus and Folkman, 1984). In this interaction, the environment presents a stressor (stage one), which the individual will have to appraise on a continuum (stage two), deciding whether the stressor is imminently harmful, potentially threatening or merely demanding (Gmelch, 1994; Somech & Miassy-Maljak, 2003). The determination of this stage two cognitive appraisal has its basis on the context created by the reciprocal relationship between the defining environmental elements,

which exist at the presentation of the stressor, and the particular values, traits, self-efficacy, desired outcomes and worldview of the person (Somech & Miassy-Maljak, 2003).

Whether a stressor is interpreted as harmful or demanding can vary based on environmental conditions and the concurrent mindset of the person. Individuals need to be able to establish the nature of a stressor accurately and quickly interpret nuances and subtle indicators that are abstract and complex by relying on cues learned in past experiences (Lazarus & Folkman, 1984). In the appraisal, if a stressor is perceived as benign, no further consideration is necessary, and no further reaction occurs (Lazarus & Folkman, 1984). Lazarus and Folkman (1984) also reported that the nature of the cognitive appraisal of stressors can be vastly different for different people with differing response patterns, or for the same person faced with similar stressors at different times. They also noted that cognitive appraisal can result in both a positive and negative response to the same stressor, simultaneously. Simmons and Nelson (2001) explained this phenomenon, saying that different organizational, personal, or professional factors, such as current state of the environment at work or at home, and current expectations in professional and personal roles can shape the stress response. The creation of conflict in the stress response occurs when resources are deemed insufficient to meet the demands of a stressor (Gmelch, 1981; Lazarus & Folkman, 1984).

In the Gmelch (1981) managerial stress cycle theory, the second stage (appraisal) determines the coping strategy best suited to the situation. Individuals either choose a direct, problem-focused coping response, or an indirect, emotion-focused response. A direct, problem-focused response has the intent to remove or alter a stressor to resolve a stressful situation. An indirect, emotion-focused response attempts to address the emotions caused by the stressor (Parker, Martin, Colmar, & Liem, 2012). Examples of direct, problem-based strategies include

seeing a challenge as a growth opportunity and acting to improve the situation by changing the stressor. Indirect, emotion-based coping strategies are best suited in dealing with unchangeable stressors, and include seeking emotional support from friends, prayer and religion, and keeping busy as a distraction (Parker et al., 2012).

Individuals who have developed a strong understanding of which coping strategies work for them in different situations are able to construct a more directed coping response. An understanding of coping skills allows the individual to match an appropriate coping strategy to a particular stressor with less effort and greater success, which uses fewer resources. The conservation of resources, the efficient use of cognitive, emotional, and social assets, leads to more long-term coping success (Wright, Mohr, Sinclair & Yang, 2015). Long-term success increases an individual's sense of efficacy in stress mediation. This increased self-efficacy increases probable future success in dealing with stress (Lazarus & Folkman, 1987).

**Self-efficacy.** As Gmelch (1994) pointed out, there is a strong correlation between self-efficacy and stress. Self-efficacy, as described by Bandura (1977), refers to an individual's beliefs concerning their ability to influence events that affect their lives. In instances where self-efficacy is high, individuals feel that situations are less stressful, whereas when facing challenges in times of low self-efficacy, situations appear more stressful (Gmelch, 1994). Lazarus and Folkman (1987) also link self-efficacy to greater success in coping, in that individuals who are confident in their ability to overcome challenges more often utilize effective coping strategies.

Bandura (2006) clarified that self-efficacy is different than the phenomena of self-esteem, locus of control, and outcome expectancies. Self-efficacy is a measure of perceived capacity, while self-esteem is a measure of self-worth. Locus of control refers to one's beliefs whether individuals determine their own outcomes, or if they are influenced by uncontrollable outside

factors (Bandura, 2006). Outcome expectancies refer to the anticipated results of an action, and can be either positive expectations or negative expectations, in each of three categories: physical, social, and self-evaluative. Positive outcome expectancies are motivational while negative expectancies function as disincentives (Bandura, 2006).

Self-efficacy is not a global trait but rather a compartmentalized concept of self in different roles, in that a professional may have a high sense of administrative efficacy, but low self-efficacy as a father (Bandura, 2006). Gmelch (1993) broadened the concept of self-efficacy in professional life to encompass three domains of role performance. These domains are task, interpersonal, and organizational. The task domain involves the technical aspects of a role, while the interpersonal domain pertains to the capacity to work in groups, and the organizational domain concerns feeling influential in the political and social workings of an organization. When any one domain of professional self-efficacy acknowledges a threat, professional identity deteriorates, and stress and burnout appear (Gmelch, 1994).

Self-efficacy influences a broad range of daily and long-term life factors. High or low self-efficacy in great part determines the type of goals people set for themselves, their aspirations, courses of action, level of commitment, amount of effort, level of emotional stability, outcome expectancies and other life-choices (Bandura, 2006). Individuals are apt to avoid situations that they perceive as beyond their ability to manage but will commit to endeavors in which they perceive themselves as capable (Bandura, 1977). Higher self-efficacy will also increase the amount of effort one expends, and the amount of persistence in overcoming challenges. This leads to greater success, which, in turn, creates increased self-efficacy, a process wherein great personal accomplishment can be transformative (Bandura, 2006).



An individual's efficacy expectations, estimates of how successful actions or behaviors will be in accomplishing a desired outcome, are derived from four sources of information: performance accomplishments, vicarious experience, verbal persuasion, and physiological states. The basis of performance accomplishment is experiences of personal mastery, or past accomplishments, which increase future mastery expectations (Bandura, 1977). Successes increase self-efficacy, and over time inoculate an individual against the negative impacts of occasional failures (Bandura, 1977). Increased efficacy can also transfer across contexts, from one life domain into another, such as success in a public speaking engagement leading to increased self-efficacy in social situations (Bandura, 1977).

Efficacy expectations may also develop through vicarious experiences. Witnessing others successfully tackle stressful situations can increase perceived capacity and motivation in the self (Bandura, 1977). Since the influence of these vicarious experiences is a secondary input based in empathy and comparing the self to others, it is less effective in increasing efficacy than direct experience with one's own accomplishments (Bandura, 1977). While drawing inspiration from seeing others genuinely overcome actual challenges has a moderate tendency to influence increased self-efficacy, modeling can also help people to realize that if they persevere, they can be successful.

The third source of information in the forming of efficacy expectations is verbal persuasion. Through planned suggestions, people can learn to believe that they are capable of meeting demands that they previously believed they were unable to manage (Bandura, 1977). The ease and availability of verbal persuasion techniques make them a very common treatment in intervention plans seeking to increase someone's self-efficacy, but any impact garnered from

verbal persuasion lacks grounding in authentic personal experience, and therefore may not prove successful in the long-term when faced with persistent stressors (Bandura, 1977).

The final source of input for the formation of efficacy expectations is physiological states, or emotional arousal. Stressful experiences stimulate emotional arousal, which can be informative as to one's perceived competency (Bandura, 1977). Strong emotional arousal often impedes performance, and self-efficacy tends to decrease as arousal increases. Anticipatory self-arousal, fearing that one will be afraid, can magnify anxiety to levels that are not appropriate to the actual stressors (Bandura, 1977). Fear reactions keep individuals from attempting action, and these avoidance behaviors impede the development of coping strategies and competence, which then feeds the fear reaction in a self-perpetuating cycle of low-efficacy and low performance (Bandura, 1977). Failure avoidance as a coping strategy creates a negative environment, but interruption of this cycle is possible by actively seeking to develop a mastery orientation.

Mastery orientation is a growth mindset, associated with the belief that task-directed effort is effective in overcoming obstacles, and that challenges are malleable and resolvable (Parker et al., 2012). Withholding effort to avoid failure is indicative of a fixed mindset, a belief that ability is a fixed quality that effort and perseverance cannot improve. Those with a fixed-mindset avoid challenges, quit easily, feel effort is pointless, ignore useful feedback, and are threatened by other people's success; a growth mindset considers effort the path to mastery, allowing individuals to embrace challenges, persevere through difficulties, and to accept and use feedback (Yeager & Dweck, 2012). In terms of generating positive outcomes, it depends on whether individuals feel that their capabilities are a product of their nature and immovable (fixed mindset) or whether they believe that effort and intention can change these core capabilities (growth mindset (Dweck, 2012)).

### **Multidimensional Theory of Burnout (Maslach, 1998)**

Maslach's multidimensional theory of burnout (1998) is also paramount to this study and is the more recent iteration of a theory resulting from over four decades of research into the phenomenon of burnout. If coping strategies are not used or fail, if self-efficacy is low, and the continuous presentation of novel stressors persists, extended periods of work-related stress can lead to poor health, physically and mentally, including burnout. Maslach and Jackson (1981) explained that burnout is the consequence of an extended exposure to job-related stress over time. Burnout can provoke three main consequences: physical and emotional exhaustion, cynicism and detachment from one's work, and a decreased sense of self-efficacy.

The term *burnout*, first described by psychiatrist Herbert Freudenberger (1974), stemmed from his work alongside volunteer mental health workers rehabilitating drug addicts. The addicts suffered an extreme loss of energy and motivation from their addictions, which was colloquially called burnout, a term he then applied to himself and other caregivers, who exhibited similar symptoms (Maslach, 1998; Schaufeli, 1999). Maslach became aware of this term as a clinician in California working with health care professionals who were emotionally drained by their work, a state she then labeled burnout (Schaufeli, 1999).

It is helpful to explicitly differentiate between stress and burnout. If stress is the process of adapting to meet environmental demands, burnout is the consequence of a break-down in coping strategies from extended exposure to job-related stress (Schaufeli, 1999, p. 22). Maslach and Jackson (1981) wrote that burnout occurred most often in professionals whose jobs require working closely with and for other people (p. 99). For school leaders, the other people (the clients) are children, families, and teachers.

Interactions often centered on the physical and emotional needs of clients, in circumstances that can induce fear, anger, shame, embarrassment, or despair (Maslach & Jackson, 1981). The complex nature of these situations often leaves no clear-cut solution, creating frustration and ambiguity for the human service professional, such as the school leader. Maslach and Jackson (1986) later classified these three consequences of burnout syndrome as emotional exhaustion, depersonalization, and a reduced sense of accomplishment.

Depersonalization is feelings of negativity towards the client, cynical thoughts that somehow the clients' problems are deserved and are their own fault (Schaufeli, Enzmann & Girault, 1993). Physical and emotional exhaustion are the most commonly reported impacts of burnout syndrome, conditions that often prompt the sufferers to distance themselves from their work and other people, perhaps in an attempt to better cope with the chronically stressful circumstance (Maslach et al., 2001). This self-imposed distancing leads, in an almost immediate reaction, to depersonalization, which is developing a callous disregard for clients by mentally dehumanizing them, viewing them as impersonal objects (Maslach et al., 2001). Exhaustion and depersonalization contribute greatly to the third aspect of burnout syndrome, a reduced sense of personal accomplishment. This inefficacy develops alongside the other aspects, as it is hard to feel a sense of accomplishment when physical and emotional exhaustion has set in, and when working to help people who have been mentally dehumanized (Maslach et al., 2001). As Lazarus and Folkman (1987) noted, a decrease in self-efficacy reduces the chance of future success, which further decreases feelings of self-efficacy. It is this downward spiral that characterizes burnout as opposed to isolated feelings of stress (Maslach, 1981).

## **Related Literature**

As described in the theoretical framework, the two undergirding theories for the study are managerial stress cycle theory (Gmelch, 1981) and the multi-dimensional theory of burnout (Maslach, 1993). The overlay of these interrelated theories will apply to the experiences of charter school leaders with job-related stress or burnout. Understanding what causes stress and how to cope with stress could help charter school leaders to avoid burnout and its negative effects.

This section will explore the effects that stress has been shown to have on physical and mental health. Extant research investigating stress and public-school principals is reviewed. The focus in the literature has been strongly concerned with traditional district school leaders. Tied to the strain of the principalship, the idea of executive isolation is discussed as a well-documented stressor. The influence of leadership style as relates to stress is also considered. Developing context to the work life and challenges of charter school leaders, the history of charter schools in the United States is briefly outlined, as are some of the distinctive roles and obligations charter leaders may be tasked to meet, in contrast to traditional district-school principals.

### **Stress and Health**

The origin of the term stress—in relation to its modern medical connotation to health and well-being—can most reliably be attributed to Hans Selye (1936 as cited in Lazarus & Folkman, 1984). Selye later published the six volumes of the Annual Report of Stress in the early to mid-1950s, which he synthesized into a book, *The Stress of Life* (1956). Selye's (1956) findings explored the concept of stress as a combination of biological defenses against any physical or psychological threat. Over the following two decades, the study of stress broadened and evolved

from a focus on the physiological processes of stress in organisms into burgeoning fields in psychology and the behavioral and medical sciences (Lazarus & Folkman, 1984).

According to Ventura, Salanova and Llorens (2015), job-related stress is a primary health complaint reported by people in the workforce. Maslach (2001) reported that the correlation between stress and poor health outcomes has been clearly established in the literature and has inspired the creation of wellness programs in school and offices around the country. Phillips and Sen (2011) reported that for teachers and school leaders alike, job-related stress was found to be nearly 50% higher in the field of education than in any other profession. The literature established that strokes, cancers, ulcers, arthritis, diabetes, tension, migraines, back pain, and high-blood pressure are caused or exacerbated by stress (Simmons & Nelson, 2001). Atkinson (2004) reported that 80% of injuries at work, one third of all workers' compensation claims, and 40% of employee turnover are stress related.

Stress can increase cortisol levels in the bloodstream, as the body adapts to the environment by increasing blood sugar and fatty acids to fuel the stress response (Simmons & Nelson, 2001). Raised cortisol levels over an extended period can harm digestion, the immune system, and the skeletal-muscular system. Elevated cortisol can also lead to weight gain, even in people who maintain otherwise healthy habits (Atkinson, 2004). Additionally, stress causes elevated cholesterol levels, and increases the risk of cardiovascular diseases through excess homocysteine, a damaging amino acid that deteriorates the walls of the arteries (Atkinson, 2004).

Goff (2012) noted that though roles and responsibilities of charter school leaders differ significantly from those of traditional district principals, there is a gap in the literature on charter school leadership. Considering that charter school leaders face different or additional challenges compared to traditional public-school leaders, the stressors they experience may be different than

those described by traditional public-school principals. Little or no research exists on the experiences of charter school leaders, which underpins the significance of this study.

### **Stress and the Principalship**

There exists in the literature a decades-long thread of research that examined the stress experienced by school administrators, and consequentially, the stressful nature of school leadership is well documented (Klocko & Wells, 2015). A 2011 survey of principals found that 70% of principals described their work as moderately to highly stressful (Ginsberg & Multon, 2011). Sogunro (2012) found that 96 % of all principals who participated in the study reported that the levels of job-related stress associated with their work affected their personal and professional relationships, and their physical and mental health. DiPaola and Tschannen-Moran (2003) claim that over the last 30 years, the demands of the principalship have greatly increased. The complex and stressful nature of school leadership has led to concerns about attracting and retaining qualified, competent, successful administrators (Boyland, 2011; Coelli & Green, 2012). Ozer (2013) pointed out that the complex nature of the job which requires both technical and social acuity in dealing with a wide array of tasks, challenges and personal interactions leads very often to burnout. Gillman and Lanman-Givens (2001) noted that finding new principals is difficult, as teachers witness the stress inherent in the principalship. Considering the modest increase in salary versus the heavy increase in workload, teachers report that the financial rewards are outweighed the overwhelming scope of responsibilities (Gillman & Lanman-Givens, 2001).

There are various crises that loom constantly, either to be worried about, anticipated, planned for, prevented, or actively managed once they occur, such as suicides, accidents, accusations of sexual assault or harassment, losing electricity or internet, or a widespread illness (Holmes, 2016). To these could be added disruptive students, faculty in-fighting, budgetary

concerns, instructional leadership, and underlying everything, the desire and responsibility for positive student outcomes. While some responsibilities may be delegated, and experts can be engaged to assist with certain tasks, the school leader is still expected to be fully informed about everything, always (Holmes, 2016). As a result of job-related stress, school leaders may have the increased propensity to suffer from health-inhibiting behaviors, such as poor sleep habits, lack of exercise, and increased alcohol intake (Holmes, 2016). These behaviors exacerbate the already significant consequences of stress, and decrease a leader's ability to act with thoughtfulness, empathy, rationality, and compassion (Holmes, 2016).

Furthermore, the pressures and demands on school principals are changing, and "job stress for principals is increasing over time" (Boyland, 2011, p. 5). Changes in the political and educational landscape in the past decade have greatly altered the nature of the principalship, leading to less time, more conflict and greater levels of stress and burnout (Boyland, 2011). With increased calls for more school accountability, the heightened importance of student achievement as measured by standardized testing, and rising budget constraints, the workload for school leaders is constantly growing (Klocko & Wells, 2015). Additionally, in the modern educational climate the role of the principal is broadening beyond the more traditional managerial role to also encompass instructional coaching and transformational leadership components (Wells, 2013). As such, expectations now demand that school leaders operate less from an authoritative position of power and more through diplomacy and consensus building (Wells, 2013). Consensus building requires managing many types of relationships.

The large number of people in a school community and the numerous types of social interactions make the emotional climate of the school complex; with many varying types of interpersonal relationships, from student to student, student to teacher, teacher to teacher, teacher



to parents, parent to student, principal to parents, etc. Schools are increasingly difficult environments to work in, and the principal must face the majority of all conflict (Sogunro, 2012). The emotional health, and emotional quotient of the school leader directly impacts the culture and character of the learning environment (Sogunro, 2012). Meeting the expectations from a wide range of constituents can lead to stress, stemming from both role ambiguity and role conflict (Gmelch, 1994). Dealing with intrusive, overbearing boards, the concerns of anxious parents, and the strain that a complex and demanding job can have on home life, can create elevated levels of job-related stress (Holmes, 2016).

Role conflict occurs when a school leader must act in a role that conflicts with his or her core values, or if he or she is required to act in two separate roles that contradict each other: if he or she is presented with requirements from the state that conflict with personal values as an educator, for instance, or if resolving the demands of a parent conflict with the needs of a teacher. One role of an administrator is as an instructional leader who supports and trains teachers. This can conflict with the concurrent role of faculty evaluator who must make personnel decisions. Different situations require different roles and different leadership styles between which an administrator must shift quickly and often, a necessity that can increase feelings of stress (Gmelch, 1994). The stress of the school leader can transfer to the teachers, then to students, and back again to the leader, compounding the stressful nature of the learning environment (Darmody, 2014). Leaders in distress, then, can negatively affect outcomes across the whole school.

### **Executive Isolation**

Another difficulty for school leaders explored in the literature on managerial stress is executive isolation, the fact that leadership can be a lonely, isolating job (Boyland, 2011; Drago-

Severson, 2012; Holmes, 2016). School leaders feel the expectation to be strong and knowledgeable, confident in their abilities to create a shared vision for the betterment of the school, and to lead stakeholders in a concerted effort to meet that vision. The principal's assumed traits include demonstrable grace, empathy and expectations that they are infallible, leaving leaders unable to vent, express self-doubt, or show emotion, a constant source of managerial stress (Holmes, 2016). Many researchers conclude that the principalship is among the most complex, difficult, and demanding jobs in the country (Battle & U.S. Department of Education 2010; City, Elmore, Fiarman, & Teitel, 2009). As the demands of the principalship evolve over time, moving away from solely bureaucratic duties to take responsibility for all of the administrative and instructional goals of the school, stress increases (Bauer & Annenson, 2010).

Bauer and Annenson (2010) contend that feelings of executive isolation in school leaders is a strong predictor of burnout, particularly physical and emotional burnout manifestations. This propensity for burnout was especially true for leaders who had come from the classroom, working as a teacher, to move into a leadership roles, who no longer felt a deep sense of belonging at the building level (Nichols & McBride, 2017). The effects of increased social distance and decreased social interaction are amplified for those in a position of power, further exacerbating stressful feelings of isolation and loneliness (Waytz, Chou, Magee & Galinsky, 2015). The necessity to often make decisions alone that effect a broad population can increase the stress of executive isolation (Sarpkaya, 2014). This isolation and loneliness can stem from not having any peers within an organization, a sense that there is no one who understands the challenges of leadership (Robinson & Marentette, 2014). This can cause leaders to feel they lack quality social relationships, as the stress of isolation causes them to doubt the sincerity of

subordinates and suspect that interactions become filtered due to power differentials. The principal may perceive subordinates are uncomfortable discussing personal matters or challenges they are facing in the work environment (Robinson & Marentette 2014, Waytz et al., 2015).

This isolation bleeds into non-work relationships, too, as leaders' work may leave little time for social interactions (Robinson & Marentette 2014). Prolonged feelings of loneliness can lead to burnout, as isolation triggers the brains pain mechanisms in ways that mimic the effect of actual physical pain (Robinson & Marentette 2014). The medical effects of loneliness predict burnout, depression, mental health issues, and cognitive ineffectiveness, decreasing self-efficacy, confidence, and self-image (Rokach, 2012).

### **Leadership Styles and Leader Stress**

School leadership has a significant, indirect impact on student outcomes, through a direct impact on teacher performance (Leithwood & Day, 2008; Leithwood & Jantzi, 2005; Nash, 2010; Pepper, 2010; Sun & Ni, 2016). To maximize their positive impact on student outcomes, leaders must move along a leadership continuum, which spans from transactional leadership to a transformational leadership style. James MacGregor Burns (1979) introduced the theory of transformational leadership in his publication, *Leadership*, with a description of transformational leadership not as a set of specific behaviors, but instead as an ongoing process in which leaders and followers work together to increase the general capacity of the team. Burns' theory drew heavily from Maslow's hierarchy of human needs, in which Maslow outlined basic human needs (such as food, water, and shelter) as the base of a pyramid, upon which were then built the higher-order growth needs, such as achievement, responsibility and, finally, self-actualization (Freitas & Leonard, 2011; Juliano & Sofield, 2011; Lester, 2013).

Whereas the transactional leader offers an exchange with followers, meeting their immediate economic or physical needs in exchange for contracted services, the transformational leader's goal is to inspire followers by engaging their sense of a greater purpose and motivating them to strive toward a shared, higher goal, one consistent with the objectives of the organization. From this standpoint, once their immediate (basic) needs are satisfied, followers are free to focus on higher level needs, growth needs according to Maslow, becoming active and efficient agents of positive change [self-actualization] (Leonard, 2013).

Therefore, the impact of school leadership on student outcomes is significant, but indirect; it comes through a direct influence on teacher efficacy, with the goal of increasing teachers' moral capacities and making them, in turn, leaders. Transformational leadership increases teacher engagement, strengthens their commitment to the school and its mission, and builds a sense of competence and of value, as part of a collaborative team (Demir, 2008; Pepper 2010). Transactional leadership fosters interactions that create shared leadership structures that allow all team members to build leadership potential (Leithwood & Jantzi, 2005). The transformational leader, therefore, seeks to inspire capacity development and higher personal commitment to organizational goals on the part of all stakeholders. Transformative leadership creates an organizational vision and makes that vision a shared collaborative goal. This increase in capacities and commitment has the intent to produce greater effort and more productivity (Bass, 1999; Burns, 1979). An environment emerges where teachers have the self-efficacy to lead their students in a transformational way, increasing student self-efficacy and academic outcomes. Teachers' intellectual stimulation increases, and they become involved in their own professional and moral development.

This environment of development fosters innovation, risk-taking and positive organizational change (Jingping & Leithwood, 2012; Leithwood & Day, 2008). Conversely, where transactional leadership is more authoritarian and less concerned with developing collaborative organizational goals, only meeting the basic needs of followers through a transactional relationship, and there is little innovation or less risk-taking. In schools, this may create an initially solid and stable educational environment for the present, but teachers receive no opportunity to learn, develop or grow, and will soon come to feel overwhelmed, detached and ineffective: in short, burnt out (Arif & Sohail, 2009). Pepper (2010) added that promoting shared leadership and encouraging others to take on leadership tasks based on their knowledge and interests fosters engagement and productivity.

For a school leader who is unfamiliar with transformational approaches or finds these practices outside her natural leadership style, adopting a transformational approach is stressful (Arif & Sohail, 2009). This creates a role-conflict cycle as described in adaptive cost theory where continually adapting to stressful circumstances leads to reduced cognitive resources and forces a leader to focus more closely on their own needs and to be less aware of the needs of others (Leonard et al., 2016). Leadership then becomes more transactional and authoritarian. Strained leaders consider less information and fewer, less-creative options (Leonard et al., 2016).

Leaders, when faced with challenges, may experience eustress: greater engagement, more job satisfaction, and higher performance (Courtright, Colbert & Choi, 2014). The same challenges, however, may cause emotional exhaustion or burnout, a deterioration of effective leadership, and a more abusive transactional leadership style. This can manifest as absent, laissez-faire leadership practices that are destructive to the organization (Courtright et al., 2014).

It could be that there is a tremendous psychological cost in constantly maintaining the physical and emotional effort necessary for effective leadership (Courtright et al., 2014).

School leaders can learn to become more transformational in their leadership style, increasing their emotional intelligence, and this helps in transactions with school staff and organizational outcomes (Leonard et al., 2016; Parry & Sinha, 2005). Such training would focus on five determined Transformational Leadership Behaviors (TLBs), broadly accepted and taken from Bass (1999). The five specific leadership qualities associated with transformational leadership are charisma, idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration. Parry and Sinha (2005) evaluated the before and after performance of fifty voluntary participants who underwent a full range leadership development program, focusing on their perceived frequency of application of the five transformational leadership behaviors. The authors found development of the five factors of transformational leadership can occur through training (Parry & Sinha, 2005). Leaders already struggling with stress or burnout, however, may find the demands of learning a completely alien leadership style unmanageable and unbearable (Leonard et al., 2016).

While it may be desirable and effective to increase the use of transformational leadership habits, there exists a further complication. Several studies agree that that a hybrid of transformational and transactional approaches is often necessary, requiring an astute deftness from school leaders (Arif & Sohail, 2009, Bass, 1999, Leithwood & Day, 2008). Sun and Leithwood (2012) noted that leaders act along a continuum that runs from transactional to transformational, and that in the course of their work, while most leaders tend to move along a transactional-transformational spectrum, those who use mainly transformational strategies are more successful. Since it is only when basic needs are met (transactional) that followers are in a

sustainable place and can focus on growth needs beyond the level of the own self-interest (transformational), a combination of transactional and transformational behaviors is sometimes appropriate and effective (Leithwood & Day, 2008).

Transactional leadership is effective and useful in clarifying goals and expectations, and in offering recognition of work well done. Contingent reward, for example, is a style of transactional leadership that is constructive rather than destructive, wherein administrators positively express concrete expectations, and then recognize and reward task accomplishment (Arnold, Connelly, Walsh, Ginis & Ginis, 2015). Blending the transactional role and transformative role can foster role-conflict and stress (Gmelch, 1994). Pepper (2010), though, concluded that a hybrid mix of transformational and transactional leadership fosters the sharing of experience and expertise between faculty and administration. The shared vision enriches the instructional implementation by ensuring that stringent expectations for teachers and students by explicitly stating them (Pepper, 2010). Consistently leading with the necessary sensitivity and nuance is stressful, but can improve a school's climate, culture, and student outcomes (Pepper, 2010).

### **History of Charter Schools**

In 1983, the establishment of the National Commission on Excellence in Education (NCEE) to investigate the state of the American public-school system. The commission's findings came out in a report entitled *A Nation at Risk: The Imperative for Educational Reform*. The report argued that our public schools were not preparing students for success in the modern workplace. Findings suggested that while more people were graduating high school than in previous generations, they were still not prepared for further education or to enter the workforce

(NCEE, 1983). It is striking how timely and germane these 34-year-old claims would seem in conversations about education today.

The report led to heightened concerns in the educational, political, and business realms as to whether our failing schools were set to erode America's competitiveness in an increasingly global marketplace (Karanovich, 2010). As schools of choice, charter schools were conceptualized, in part, to foster greater innovation in our public-school system, and to create schools driven by, and subject to, market forces like those that determine commercial success for companies. The schools must contend with consumer satisfaction and public demand, with the belief that free market competition in the education field would create better schools for less money (Karanovich, 2010).

Minnesota was the first state to pass charter school legislation in 1991 (Bulkley, 2011; Junge, 2014). Leaders from multiple industries came together to create the first charter school legislation in the country (Junge, 2014). Once the legislation passed, although nine charter applications were filed, only two charters were granted, and those went to schools with very specific foci: a school for students who were deaf and blind, and an alternative, last-chance high school. The innovation and cutting-edge education the laws were created to foster were being stifled by the only bodies authorized to grant charters, the local school boards, a situation which was seen by many as a conflict of interest (Junge, 2014). It was this frustration that led to a 1993 amendment to the legislation, which allowed other bodies to award charters, including universities and non-profit organizations.

After establishing Minnesota's charter laws, the national conversation concerning charter schools and parental choice began receiving increased attention. One early proponent was the Chair of the Democratic Leadership Council, Governor Bill Clinton. As president, he continued



to support the charter movement, as did George W. Bush and Barack Obama after him (Bulkley, 2011; Junge, 2014). Prominent philanthropies, including the Gates Foundation, the Walton Foundation and the Broad Foundation have also strongly supported charter schools (Bulkley, 2011).

### **Perceptions of Charter School Performance**

As schools of choice, charter schools face increased scrutiny concerning their performance from parents, school boards, and the media, both in education circles and in the broader public discourse (Blitz, 2011; Flaker, 2014). The conversation as to the effectiveness of charter schools is a complicated one. As the emphasis of charter schools varies from school to school, so too does their reported results, a discrepancy which leaves questions as to the actual value and performance of charter schools. Student groups compared to one another often should not have been considering varying methods of sample selection, and preexisting differences including disparity in rates of attrition, motivation, and student ability (Barr et al., 2006; Witte, Schlomer & Shober, 2007). Results from many studies cannot be replicated, therefore, and it is prohibitive towards determining whether charter school enrollment or some other factor or factors may have caused any differences in student outcomes (Barr et al., 2006; Betts & Tang, 2011; Witte, Shober & Schlomer, 2007).

Charter schools, their goals and their students also differ greatly: a student at a charter school centered on English as a Second Language (ESL) immersion is taught differently from a student in a charter school focused on STEM/STEAM, yet many studies amass the achievement rates for all students in all schools, although failure to allow for differences in curricula, instructional models, and school design can skew findings (Barr et al., 2006). Researchers have, however, identified several key factors for increasing charter school success rates, including

individual state charter school laws; sufficient provisions for autonomy and accountability; equitable financing for operations and facilities; encouraging a mix of both start-up and conversion charter schools; and facilitating access to similar resources and skill-building opportunities as provided to district schools (Bancroft, 2009).

Questions as to what defines success also determine perceived levels of success. Standardized test scores may often show that there is little difference between schools in math and reading scores, but in terms of value added, parental approval and student contentment, charter schools often out-rank traditional public schools (McDermott, Rothenberg & Baker, 2006; Buckley & Schneider, 2003). The definition of success is different in different circles. That definition is a question at the core of deciding which schools or students are successful. For example, Bifulco and Ladd (2007) argued that charter schools in North Carolina are increasing the Black-White test score gap, while Harvard economists Hoxby and Rockoff (2005) contrarily reported that minority students particularly benefit from school choice and charter school enrollment.

The diverse findings may also be indicative of a great divide between advocates of school choice and those who feel the reallocation of public funds to charter schools hurts traditional public schools, especially in urban districts. Judy Jackson May (2006) summarized this debate, writing “school choice has deeply polarized the United States as millions of dollars are attached to students choosing to exit the traditional public school to attend alternative school settings” (p. 20). As Buddin and Zimmer (2005) theorized, the degree of difference in charter school laws from state to state make it hard to judge what school success might look like. The different perceptions of charter schools from across the political and educational landscape can cause stress for charter school leaders (Blitz, 2011).

## **Different Roles and Responsibilities for Charter School Leaders**

The leaders of traditional public schools are principals. Blitz (2011) observed that charter school leaders have many titles, such as director, headmaster, executive director, and principal. Blitz (2011) further noted that duties as well as titles differ between charter school leaders and the traditional school principal. Though there are certainly duties in common between charter school leaders and traditional public-school principals, charter school leaders face a range of challenges rarely encountered by their district school counterparts (Bickmore & Dowell, 2014; Blitz, 2011; Campbell & Gross, 2008; Cravens, 2012; Goff, 2012).

Differences stem partly from the autonomy offered to chartered schools, in that there is no central office, and charter leaders take on roles similar to those of a superintendent on a small scale, maintaining enrollment (entrepreneurial role, customer service role), and meeting state standards, while also remaining true to the unique mission and methods which justify the existence of the school (Bickmore & Dowell, 2014; Blitz, 2011; Ndoye, 2010). Recruiting and training, and then retaining quality teachers is a struggle for charter school leaders (Blitz 2011; Bloomberg, Nathan, & Berman, 2008). Charter school leaders must negotiate the often-contentious relationship with the district in which they reside, but are not a part of, and meet state obligations while remaining true to the alternative model outlined in their charter (Anderson, 2005; Bulkley & Wohlstetter, 2004; Finn, Manno & Vanourek, 2000). As Hill, Lake and Celio (2002) noted, in addition to traditional public school principal roles, charter leaders are further burdened with numerous other tasks, such as maintaining facilities, managing interactions with the local school board, and working with parents who threaten to withdraw their children from the school.

Roles traditionally performed by central office personnel fall to the charter school leader (Sun & Ni, 2016). Unlike their traditional public-school counterparts, charter leaders engage in fundraising, curriculum development, budget creation and management, facilities management, student recruitment, policy writing, and struggle more with attracting and retaining quality teachers (Sun & Ni, 2016). Charter school leaders work intensely with families to educate them about the vision, mission, and methodology of the charter school. Even after a student enrolls, it remains necessary to monitor parent and student satisfaction. Charter school leaders frequently need to reassure and re-educate stakeholders about the aspects of the school which led them to enroll in the first place. (Blitz, 2011; Wohlstetter, Smith, & Farrell, 2015).

As schools of choice, expected to be innovative and competitive, charter schools and charter leaders find themselves subject to market mechanisms such as customer satisfaction (families and students), increased accountability, the necessity of advertising, and branding (Blitz, 2011; Sun & Ni, 2016). Charter schools have their own school board, to which the charter leader answers to, while also being accountable to the state, the authorizing agency and families and students (Blitz, 2011). These various constituencies present varying and sometimes contentious accountability demands; charter leaders must navigate these conflicting demands, trying to stay true to the non-traditional methods the school offers in its charter while meeting the expectations of state requirements designed to measure traditional schools (Blitz, 2011). Sullins and Miron (2005) concluded that the biggest challenge facing charter schools was fulfilling their distinct vision while meeting state and federal requirements for student achievement. Necessary compromises may end up changing or diluting the innovative programs and curricula in order to adhere to state standards, which can cause disillusioned families to leave for other schools,

decreasing enrollment and thereby funding, making innovative schools of choice schools less viable (Blitz, 2011; Sullins & Miron, 2005; Sun & Ni, 2016).

Leithwood, Harris and Hopkins (2008) argued that after teacher effectiveness, strong school leadership impacts student achievement more than any other factor. Kaplan, Owings, and Nunnery (2005) stated that effective school leadership affects the success of the whole school. Categorizing leadership practices often fall into different domains. Speaking to leadership across industries, Kouzes and Posner (2010) use numerous research study results, interviews, and anecdotes to list and describe what they have identified, over many years, as the Five Principles of Exemplary Leadership. These are: (a) model the way, (b) inspire a shared vision, (c) challenge the process, (d) enable others to act, and (e) encourage the heart. Using a similar classification scheme specific to education, Leithwood et al. (2008) divided practices used by successful school leaders to improve student outcomes into four categories: building vision and setting directions, understanding and developing people, redesigning the organization, and managing the teaching and learning program.

Building vision as a category encompasses the motivation of faculty and staff and creating a shared vision that team members can collaboratively strive for. Group goals become the fuel for organizational drive, and define collectively accepted high-performance expectations (Leithwood et al., 2008). Practices in this category are imperative in school-turn-around situations but are also useful in most schools; long-term goals should be broken up into short-term priorities to maintain a shared vision and shared sense of responsibility (Leithwood et al., 2008).

Understanding and developing people entails building both the capacity (skills and knowledge) of teachers to implement best practices and the disposition (commitment and

persistence) to apply them consistently. Redesigning the organization refers to efforts to creating a work environment that supports and sustains teachers, allowing them to thrive in their profession. This is accomplished by creating a culture of collaboration, collegiality, positive relationship with parents and the outside community. Managing the teaching and learning environments refers to maintaining the organizational stability and school infrastructure (Leithwood et al., 2008). Specific practices include staffing choices, instructional leadership and support, and serving as a buffer between teachers and outside distractions (Leithwood et al., 2008).

The impact of leadership on student outcomes does not only pertain to instructional practices or budgetary concerns. Also important is the modeling and molding of the school core values. Kouzes and Posner (2010) determined that to be a leader, a person must be honest, inspiring, forward-thinking, and competent. Soehner and Ryan (2011) wrote that good school leaders are actively monitoring the culture and character of school, including among teachers and students. In setting the tone, and leading as the moral example, leaders can create safe, nurturing environments that support not only learning, but healthy whole-child development (Allen et al., 2015).

### **Summary**

Chapter Two presented a review of the current literature concerning the demands of school leadership, the stressors and coping strategies of the principalship, and the differences between the roles and responsibilities of traditional school principals and those of charter school leaders. A gap in the literature identified as concerning the experiences of charter school leaders, and a theoretical framework were explained. School leadership is complex and difficult (Boyland 2011; Combs et al., 2009; Klocko & Wells, 2015). Charter schools are serving a

rapidly expanding population of students. Therefore, it is important to understand the impact of stress and burnout on charter school leaders

## **CHAPTER THREE: METHODS**

### **Overview**

The purpose of this transcendental phenomenological study was to understand the impact of stress and burnout on charter school leaders in the western United States. The theories that guided this study included the managerial stress cycle theory (Gmelch, 1981) and the multidimensional theory of burnout (Maslach, 1998). According to Maslach (1998), the multidimensional theory conceptualizes burnout as a state of emotional exhaustion, cynicism and depersonalization, and deteriorating performance due to long-term unresolved job stress. This chapter outlines the design of this study and restates the research questions. In addition, the chapter includes a description of the setting and the participants, the procedures for conducting the study explained, a description of my own role as the researcher, a detailed explanation of the data collection and analysis, an explanation of the measures used to ensure trustworthiness, and the ethical issues to be addressed. Chapter Three culminates with a succinct summary of the chapter.

### **Design**

This transcendental phenomenological study explored stress and burnout through the perceptions of charter school leaders in the western United States. Phenomenology seeks to understand a phenomenon as experienced by individuals, considering the experience in its entirety, not only in its discernable pieces (Moustakas, 1994). Phenomenology also seeks to understand the world as understood by individuals, a reality constructed through the lens of individuals' lived experiences (Moustakas, 1994). The phenomenological structures allowed the subjects of the study to describe their own individual experiences with the phenomenon of stress and burnout in their work as charter school leaders. As the interpreter of the experiences



recorded in this study, my own lived experiences had the potential to impact the collection and analysis of the data (Tufford & Newman, 2010). Therefore, strategies such as phenomenological reduction, epoché, and bracketing were useful to focus on the essence of the lived experience of the participants, and to see beyond my personal preconceptions (Tufford & Newman). Van Manen (2016) also explained that when phenomenological reduction “suspends or removes what obstructs access to the phenomenon—this move is called the epoché or bracketing” (p. 215).

Mindful of epoché, I made every effort to sequester my personal experience and to focus purely on the textual description of the perceptions of charter school leaders who described their own experience with stress and burnout. I then built a structural description of the context of their experiences (Creswell, 2007; Moran, 2000; Moustakas, 1994). As Tufford and Newman (2010) explained, epoché requires that researchers are mindfully self-reflective, working to compartmentalize existing understandings and experiences to allow investigation into the phenomenon with a fresh and open perspective. Through these concepts and practices particular to transcendental phenomenology methodologies, including epoché, bracketing, and phenomenological reduction, I attempted to elucidate the essence of job-related stress and burnout by building an amalgamated description based on meaning units pulled from the individually described experiences of charter school leaders (Creswell, 2007; Moustakas, 1994).

### **Research Questions**

The following research questions guided this transcendental phenomenological study of the impact of stress and burnout on charter school leaders in the western United States:

#### **Research Question One**

What aspects of their employment, if any, do charter leaders in the western United States perceive as causing stress and burnout?

**Research Question Two**

How do charter school leaders in the western United States perceive that job-related stress and burnout impact their professional lives?

**Research Question Three**

How do charter school leaders in the western United States perceive that job-related stress and burnout impact their personal lives and relationships?

**Research Question Four**

How do charter leaders describe their strategies for dealing with stress to avoid burnout?

**Setting**

The setting for this study was 10 charter schools throughout the western United States. A recruitment email (see Appendix A) went out to possible participants. Participants were charter school leaders identified as having experienced job-related stress through completion of the Gmelch (1982) Administrator Stress Index (see Appendix B). Dr. Gmelch granted permission to use the ASI via email (see Appendix C). This large geographical region provided enough variety in school settings to offer a broad investigation and maximum variation in descriptions of the phenomenon of the study, namely job-related stress and burnout in charter school leaders in the western United States. The charter schools that were the setting for the study were schools of choice, and as such, offered specialized curricula or instructional methods (Blitz, 2011; Ndoye et al., 2010). The autonomy granted to charter school leaders means that the roles and responsibilities of charter school leaders differ from traditional district school principals (Bickmore & Dowell, 2011; Bickmore & Dowell, 2014; Campbell & Gross, 2008; Cravens et al., 2012).

The foundational underpinning of charter schools allows them to adopt a unique form of instruction or curriculum and often to serve an extremely specific population. In addition, charter schools can differ from each other, using diverse curricula, pedagogies, and instructional models, such as those in Core Knowledge schools, Knowledge is Power Program (KIPP) schools, and EL Education (formerly Expeditionary Learning) schools. Charter school as a term does not describe a kind of school, or a shared methodology. A charter is a blank template, which legislation allows to be filled by school founders to meet their own unique vision and goals, such as college preparation, ethnic heritage-based education, technology schools, entrepreneurial schools, and schools for students with dyslexia, or students with autism (Bulkley, 2011). The participants in this study served in schools that are distinct from one another, in terms of an urban, suburban, or rural settings, as well as differing percentages of students who are economically disadvantaged, have disabilities, or who are English Language Learners (ELLs). Schools in this study ranged from 24% to 78% of students who qualified for free or reduced-price lunches (FRL). The grade structures for the schools varied also. For example, one school was configured to teach K-5, two for K-6, four for K-8, two for K-9, and one K-12. These demographic details are presented in Table 1, below.

Table 1

*School Demographics*

School	Grades	Setting	Enrollment	Economically Disadvantaged	Students with Disabilities	English Language Learners
Alpha Academy	K-8	Suburban UT	613	24%	22%	2%
Bravo Academy	K-8	Urban AZ	1058	67%	14%	17%
Charlie Academy	K-12	Rural UT	767	33%	16%	2%
Delta Academy	K-9	Urban UT	574	52%	13%	17%
Echo Academy	K-9	Urban UT	462	48%	17%	22%
Fox Academy	K-8	Rural ID	345	39%	15%	< 2%
Gulf Academy	K-6	Urban UT	364	53%	24%	6%
Hope Academy	K-5	Suburban CO	523	24%	13%	< 1%
India Academy	K-6	Suburban UT	527	32%	13%	< 1%
Jules Academy	K-8	Urban UT	395	78%	15%	33%

**Participants**

The 10 charter school leaders identified as participants for this study, were selected using purposeful, criterion-based sampling, and vetted through the completion of the Administrator Stress Index (ASI) to ensure that all participants had experienced the phenomenon of job-related stress or burnout (Creswell, 2007; Moran, 2000; Moustakas, 1994). These data are reported only and not analyzed in any manner. I contacted 28 charter school leaders through the contact information on their school's website, of whom six responded. These charter school leaders also assisted a snowballing technique by providing the names and email addresses for other charter school leaders who they believed would be interested in participating in the study. Through this snowballing technique I contacted eight potential participants, of whom seven responded. Thirteen potential participants then received an emailed Google survey link to the Administrator Stress Index. Twelve responses were scored by me with the sole intent of determining whether a

respondent had, in fact, experienced the phenomenon of job-related stress in their work as a charter school leader. The ASI is a 35-question survey scored on a Likert-type scale ranging from Zero/Not-applicable to Five/Frequently Bothers Me. The criteria I set for participants were answering a three or above on 20 or more of the 35 questions. Based upon ASI results, I selected 11 participants. Participants are individuals who are serving, or who have served in the past five years, as charter school leaders. One participant withdrew consent by phone the morning of the scheduled individual interview.

Some of these charter school leaders held administrative credentials, while some did not. Some of the targeted participants had moved to school administration from a teaching career, while others had transitioned to education from business or other non-education backgrounds, and all had come from a wide variety of experience and knowledge in terms of management, leadership, finances, and pedagogy (Barr et al., 2006; Betts & Tang, 2011; Witte, Shober & Schlomer, 2007).

Table 2

*Charter School Leader Demographics*

Name	Gender	Age	Ethnicity	Education
Ann	Female	41	Caucasian	Doctorate
Beth	Female	46	Hispanic	Master's
Colby	Male	58	Caucasian	Doctorate
Donna	Female	42	Caucasian	Master's
Evan	Male	39	Caucasian	Bachelor's
Frank	Male	45	Hispanic	Specialist
Grave	Female	40	Caucasian	Bachelor's
Hal	Male	37	Caucasian	Master's
Iris	Female	37	Caucasian	Bachelor's
John	Male	42	Caucasian	Bachelor's

## **Procedures**

Following a successful proposal defense, Institutional Review Board (see Appendix D) approval was acquired. Data collection for this transcendental phenomenological study included individual interviews (see Appendix E), a focus group interview (Appendices F & G) and observations (see Appendix H) involving 10 charter school leaders in the western United States. Through purposeful sampling, participants were contacted by email (see Appendix A) and vetted via an online version of the Gmelch (1982) Administrator Stress Index (see Appendix B), ensuring that each potential participant had experienced the phenomenon, namely the stress associated with charter school leadership (Moustakas, 1994). Dr. Gmelch granted permission to use the ASI via email (see Appendix C). Four participants then also took part in a focus group interview (see Appendices F & G). I then transcribed the recordings of the interviews and focus group interview and analyzed them using MAXQDA, a qualitative analysis and transcription software. I also conducted six site observations (see Appendix H) of participants in their school buildings. These varied data collection methods culminated in a deep and triangulated understanding of the essence of the experiences of charter school leaders with job-related stress and burnout.

## **The Researcher's Role**

I spent eight years as the director of public charter schools in Utah. I have worked as a teacher and as an administrator in four different charter schools, and as the managing director of a private international school in Bangkok, Thailand. As a charter school leader, I have struggled with the stressors and challenges of the job. As the director of a single, stand-alone school not attached to a district, I have felt isolated, and have learned the intricacies of my profession alone, through self-study, and trial-and-error. I anticipated that my experiences would be like those of

the charter school leaders who participated in this study. I have discussed with colleagues feeling the need to find some way to perform the job of charter school leader without experiencing burnout. Some of the participants were known to me through conferences or professional development experiences. According to Moustakas (1994) to mentally bracket out my biases, through epoché, my own understanding of the phenomenon was sequestered, and the phenomenon was then mindfully viewed only through the experiences of the participants. I made every effort to bracket out my own experiences to fully discover and describe the experiences of the participants (Creswell, 2007, Moran, 2000; Moustakas, 1994).

### **Data Collection**

As the researcher for this study, I initially contacted the targeted group of charter school leaders in the western United States through email. The charter school leaders completed the Administrator Stress Index (Gmelch, 1982, see Appendix B) that identified participants who have experienced the phenomenon of job-related stress as a charter school leader (Creswell, 2007; Yin, 2015). Dr. Gmelch granted permission for use of his Administrator Stress Index via email (see Appendix C). The participants completed the survey online which was scored by me. From those respondents who completed the survey, demonstrated the experience of job-related stress, and indicated a willingness to participate, I selected 11 charter school leaders. The criteria I set for participants were answering with a three or above on 20 or more of the 35 questions. I maximized confirmability and transferability by selecting participants that represented the broadest demographic profiles, considering gender, race, years of experience and site school student demographics (Creswell, 2007). Once identified by the Administrator Stress Index, the researcher collected data using individual interviews, a focus group interview, and site

observations. These data were used for screening and descriptive purposes only and have not been analyzed qualitatively.

### **Individual Interviews**

Ten face-to-face, semi-structured interviews, using open-ended questions, occurred from September 2018 through February 2019. The interviews were scheduled via email, and all lasted between 70 and 90 minutes. In phenomenological methodology, an interview uses open-ended questions and an informal structure allowing interaction between the researcher and the participant (Moustakas, 1994). Though I had an interview protocol and a list of prepared questions, I realized I might need to be flexible, and add to this list of questions, modify questions, or omit questions altogether during the course of the interview, as participants shared their insights about aspects of job-related stress and burnout. This flexibility helped ensure that participants were given the opportunity to fully describe their personal experiences, unhindered by strict adherence to a prescribed set of questions. I recorded and transcribed the interviews. Participants had the opportunity to review transcriptions to clarify their statements or correct any misconceptions.

#### **Standardized Open-Ended Interview Questions:**

1. How did you decide to become an educator? (RQ1)
2. What was your professional experience before becoming a charter school leader? (RQ1)
3. How did you decide to become a charter school leader? (RQ1)
4. What do you believe to be the most rewarding aspects of being a charter school leader?  
(RQ1)
5. How would you describe the stress levels associated with your work as a charter school leader? (RQ1)



6. What do you believe to be the most stressful internal aspects of being a charter school leader? (RQ1)
7. What do you believe to be the most stressful external aspects of being a charter school leader? (RQ1)
8. What aspects of charter school leadership did you find surprising when you first came to the profession? (RQ2)
9. How does stress stemming from your work as a charter school leader impact your personal life? (RQ3)
10. How does stress stemming from your work as a charter school leader impact your professional life? (RQ2)
11. How do you try to manage the day-to-day stress of being a charter school leader? (RQ4)
12. How does stress stemming from your work as a charter school leader impact your physical health? (RQ3)
13. How does stress stemming from your work as a charter school leader impact your mental health? (RQ3)
14. How successful do you feel you are in managing the stress associated with your work? (RQ4)
15. Describe any periods of prolonged stress that you struggled to manage effectively, that may be perceived as experiencing some degree of burnout. (RQ2, RQ3)
16. How does burnout from your work as a charter school leader impact your personal life? (RQ3)
17. How does burnout from your work as a charter school leader impact your professional life? (RQ2)

18. What else would you like to discuss regarding stress and burnout related to your work as a charter school leader? (RQ1)

Questions one, two, and three were ice-breakers, questions that most educators have answered before, and established which charter school leaders had been teachers or administrators before (in charter or traditional schools) or who came to education as a second career (Ndoye et al., 2010). Question four asked participants to consider what aspects of the job of charter school leader are rewarding. Questions five through eight asked participants to relate the challenges in charter school leadership, both from within the school community and from without (Blitz, 2011). Question eight was intended to elicit reflections on what participants wish they would have known, and what they were surprised to face, upon first becoming charter school leaders, indicating what they believed they had been unprepared for (Goff, 2012). Questions nine through eleven asked participants how the experience of job-related stress and burnout affected their lives in roles both professional and personal. Questions 12 and 13 inquired about the effects of stress burnout on participants' physical and mental health. Question 14 inquired about their self-efficacy in coping with stress and burnout. Question 15 asked the participants about periods of unmanageable stress which could lead to burnout. Questions 16 and 17 asked participants to relate the perceived effects of burnout in their personal and professional lives. Question 18 gave participants a chance to bring up any other facet of their work and job-related stress that we may not have covered during the interview. Overall, the interview questions were meant to inspire deep reflection and description of the experiences of charter school leaders, their perceived stressors, and how they manage job-related stress.

## **Focus Group Interview**

A single focus group interview occurred with four participants in a face-to-face setting in January of 2019. The focus group interview lasted for 97 minutes. Guidelines for engagement were outlined according to the Focus Group Interview Protocol (see Appendix F). Interaction between participants allowed them to further their observations and shared insights from the individual interviews. The opportunity for focus group participants to build off one another's perceptions produced thick, rich descriptions of their experiences with stress and burnout (Creswell, 2007, Yin, 2015). I looked to delve into the shared experiences of the group and explore differences or discrepancies uncovered during individual interviews. Participants had the opportunity to review transcriptions to clarify their statements or correct any misconceptions. The focus group interview allowed me to develop a broader sense of what causes stress to charter school leaders, and how charter leaders try to manage the effects of that stress. I began the focus group interview by asking the participants to introduce themselves, state their present position, and provide a brief description of their career path to the present day. Out of concern for privacy, the focus group interview questions did not ask explicit questions about the effects of stress on health or personal lives; however, these issues came up frequently in very candid discussion.

### **Open-Ended Focus Group Interview Questions**

1. Describe your first year as a charter school leader in terms of job-related stress.  
(RQ1)
2. How has the level of job-related stress and burnout increased, decreased, or remained the same over time, and why? (RQ1, RQ2)

3. Describe what you consider to be the most stressful time during your career as a charter school leader. (RQ1)
4. What strategies do you use to cope with stress, and burnout, and how successful do you feel the strategies are? (RQ4)
5. What other topics concerning job-related stress and burnout in your work as charter school leaders do you wish to discuss? (RQ1)

Question one was intended to prompt reflections on what participants were surprised to face, upon first becoming charter school leaders, discussing what they believed they were unprepared for and what aspects of the job caused stress (Goff, 2012). With question two, participants were encouraged to consider whether the stress and burnout levels associated with the job changed over time, as they became more experienced, or as education environments changed. Question three elicited thoughts on the most stressful situations these participants had experienced over their tenure as charter school leaders. Question four sought to discover strategies or activities participants use to try to decrease stress or the effects of stress on feelings of burnout. Question five opened the discussion for participants to discuss any aspects of their work stress and burnout that they felt had not been addressed in questions one through four.

### **Observations**

According to Patton (2015), qualitative observation allows the researcher to understand and explain more fully the context of a social environment in such a way, that when combined with interviews and focus group interviews, offers a more holistic perspective of a phenomenon. I conducted observations (see Appendix H) of six participants at their schools, with each observation lasting 1.5 to 3 hours. Observations were scheduled in advance. I performed observations as a non-participant. Following all six observations I was able to debrief with the

participant before leaving their school on the day of the observation. Observations occurred at Alpha Academy, Bravo Academy, Charlie Academy, Echo Academy, Fox Academy and Jules Academy.

I looked for instances of stressors and took notes on what I noticed and what I wondered as I observed the school leader work through their day. On-site observations allowed me to experience snapshots of the workday of a charter school leader, and to validate the findings from the interviews and focus group interview (Patton, 2015). I was mindful to look for aspects of the environment that may have been unmentioned in interviews and aspects participants may have been unaware of or desensitized to (Patton, 2015). Using the observation protocol adapted from Creswell (2007), I collected descriptive field notes, while observing as a non-participant. I collected further, reflective field notes during debriefs with each participant, and expounded later on the reflective notes as I analyzed the data more thoroughly (Creswell, 2007). Each data collection method had separate strengths and weaknesses. Triangulation, using observations alongside individual interviews and a focus group interview strengthened the understanding of the phenomenon (Patton, 2015).

### **Data Analysis**

Data analysis strategies used in this study were aligned with the phenomenological analysis in the modified Stevick-Colaizzi-Keen method (Moustakas, 1994). As I prepared to begin data collection, and again when I began to analyze the data, I used the process of epoché, “setting aside predilections, prejudices, predispositions, and allowing things, events, and people to enter anew into consciousness, and to look and see them again, as if for the first time” (Moustakas, 1994, p. 85). Using epoché allowed me to look at and analyze the data with a mindfully naïve and fresh view, with an openness to seeing the described experiences for what

they are, without overlays manufactured from my past thoughts and experiences (Moustakas, 1994). I wrote in a reflective journal all my thoughts and feelings concerning my own experience with stress and burnout as a charter school director. I reviewed this journal as I analyzed the data and bracketed my experiences aside to investigate the experiences of participants without bias.

The transcripts were read multiple times, and MAXQDA, a qualitative analysis program, helped identify prominent themes and similarities in experiences, in a process of horizontalization (Creswell, 2007; Moustakas, 1994). As Creswell (2007) noted, during analysis, researchers describe, classify and interpret data to identify codes and themes in the research. Moustakas (1994) outlined the modified Stevick-Colaizzi-Keen method:

- a. Consider each statement with respect to significance for description of the experience.
- b. Record all relevant statements.
- c. List each non repetitive, nonoverlapping statement. These are the invariant horizons or meaning units of the experience.
- d. Relate and cluster the invariant meaning units into themes.
- e. Synthesize the invariant meaning units and themes into *a description of the textures of the experience*. Include verbatim examples.
- f. Reflect on your own textural description period through imaginative variation, construct *a description of the structures of your experience*.
- g. Construct *a textual-structural* description of the meanings an essence is of your experience. (p. 121)

I considered each statement in the transcripts, determining its significance as descriptive of the phenomenon of stress and burnout in charter school leaders, recording each relevant statement. From each participant's described experience from the individual interviews and the focus group interview, I then identified and listed each nonrepetitive and non-overlapping statement to create a narrative of phenomenon (Moustakas, 1994). MAXQDA helped to cluster those meaning units into themes and subthemes, which were synthesized into a textual-structural description of the phenomenon of job-related stress and burnout in charter school leadership. From all the textual-structural descriptions of each participant's experience, I built a composite description of the universal essence of the experience (Creswell, 2007; Moustakas, 1994).

### **Trustworthiness**

Participant data created rich, thick descriptions of their experiences, which are accessible and transferable to the reader, and multiple kinds of data collection provided structural corroboration (Creswell, 2007; Moustakas, 1994; Yin, 2015). Member checks offered participants the chance to clarify or restate details of their experiences, to ensure the accurate communication of the essence of their experiences. As Moustakas (1994) noted, research is valid when the data is collected through rich descriptions that make identifying the essence of an experience possible.

### **Credibility**

Like internal validity in positivist quantitative research, credibility in qualitative research deals with how closely findings reflect reality (Shenton, 2004). Methods for increasing credibility included triangulation of data sources, negative case analysis, and peer/expert review of my design and execution [i.e. external audits] (Creswell, 2007; Moustakas, 1994, Yin, 2015). Triangulation involves the use of multiple methods to collect data, helping to round out a

multifaceted view of the phenomenon. Negative (or deviant) cases analysis entails looking for and considering data that seem to contradict an emerging theory in a study (Schwandt, 2015). I reviewed my reflection journal as I analyzed the data and bracketed my experiences aside to investigate the experiences of participants without bias, focusing on the described experiences of the participants. Finally, I increased the credibility of this study through reflective journaling, triangulation, member checking, and peer review.

### **Dependability and Confirmability**

Shenton (2004) noted that there is a close relationship between credibility and dependability in that strong credibility underpins the perception of dependability. In this study, triangulation, outside scrutiny, and the keeping of a reflective journal assisted in establishing dependability (Anney, 2014; Shenton, 2004). Triangulation is the use of multiple methods of data collection, such as individual interviews, focus group interviews, and observations. Using these methods together synergistically heightens the strengths of each collection method while compensating for each method's shortcoming (Shenton, 2004). Outside scrutiny of this study by committee members and by peers offered feedback to challenge any false assumptions this researcher developed.

Similar to objectivity in quantitative studies, confirmability in qualitative research concerns the steps taken to confirm that results reflect the true essence of participants' experiences, as unadulterated as possible by the researcher's bias or expectations (Patton, 2015). Tobin and Begley (2004) noted that confirmability is showing that the conclusions are drawn from the data, and not simply the mind of the researcher. The epoché process helped me to avoid researcher bias. The epoché calls on a researcher to acknowledge and then set aside preconceived ideas, experiences, and prejudices to mindfully discover the pure lived experience



of a subject within the phenomenon. As van Manen (2014) explained, being mindful of the epoché is to “be aware of one’s own constant inclination to be led by preunderstandings, frameworks, and theories regarding the (psychological, political, and ideological) motivation” (p. 224).

### **Transferability**

Bitsch (2005) suggested that purposeful sampling and rich description form the basis of transferability. Rich description of a phenomenon provides enough detail to allow a reader to determine the transferability of conclusions from a study to other people, places, or situations (Holloway, 1997). The use of purposeful sampling will help strengthen the transferability of the findings of this study. Purposeful sampling as a process was meant to support maximum variation by identifying participants with varied experiences and demographic backgrounds, increasing the diversity of my sample group. Qualitative research examines a specific phenomenon within a small group of particular people, and does not, therefore, seek results that are broadly generalizable (Shenton 2004). Qualitative studies aim to discover findings which other researchers can adjust to use with similar settings or populations (Shenton, 2004).

### **Ethical Considerations**

Before the collection of any data could begin, approval from the IRB (see Appendix D) was necessary. For the protection of participants, all digital content had password protection, and all printed materials will be stored in a combination-locked cabinet in my home office for five years after the completion of the study and my dissertation. Each participant received a pseudonym as did the research locations (Creswell, 2007; Moustakas, 1994, Yin, 2015). Although completion of the survey was indicative that participants agree to participate, participants also signed an informed consent at the time of the interview or focus group

interview, which stated that their consent may be withdrawn, without penalty, at any time. Member checking allowed participants to review the transcript of their interview to clarify or redact any statements, and participants were able to read my interpretation of the data to voice any concerns over my conclusions or any possible omissions. The focus group protocol (see Appendix F) included guidelines to protect confidentiality.

### **Summary**

The purpose of this transcendental phenomenological study was to understand the impact of stress and burnout on charter school leaders in the western United States. The theories guiding this study were the Gmelch (1981) managerial stress cycle theory and the Maslach (1998) multidimensional theory of burnout. This chapter outlined the rationale for the transcendental phenomenology research design of this study. The four research questions guiding the study were presented. Descriptive data about the participants were presented. In addition, the details of the sites were explored and described. My own experience with the phenomenon of stress and burnout in charter school leaders was included.

Also outlined in this chapter were the data collection methods for the study that included a screening survey, one-on-one interviews, a focus group interview, and site observations. An explanation of the data analysis procedures followed along with the measures used to address issues of trustworthiness. Finally, a description of the ethical considerations was presented, mindful of the physical and emotional safety of participants.

## **CHAPTER 4: FINDINGS**

### **Overview**

The purpose of this transcendental phenomenological study was to understand the impact of stress and burnout on charter school leaders in the western United States. This chapter presents the findings of the study. The transcription and coding of the individual interviews from 10 different charter school leaders and a focus group interview with four charter school leaders, along with descriptive and reflective field notes from onsite observations were analyzed to identify themes. This chapter includes a description each of the participants, a discussion of six identified major themes, subthemes, and the findings as they relate to the four research questions of this study.

### **Participants**

The 10 participants in this study included seven educators who were working as charter school leaders and three participants who had been charter school leaders in the past five years. The sampling for participants in this study was purposeful, criterion-based, and snowball. All participants were vetted through screening, using the Administrator Stress Index (see Appendix B), to ensure that all participants had experienced the phenomenon of job-related stress or burnout in their work as a charter school leader. All names used in this study are pseudonyms.

Table 3

*Charter School Leader Overview*

<b>Name</b>	<b>Gender</b>	<b>Years as a Charter School Leader</b>	<b>Title</b>	<b>Teaching Experience</b>	<b>Administrative Endorsement</b>	<b>Highest Degree</b>
Ann	Female	7	Director	8 years	Yes	Ph.D.
Beth	Female	6	Principal	3 years	Yes	MS
Colby	Male	21	Executive Director	2 years	No	Ph.D.
Donna	Female	4	Director	4 years	No	MA
Evan	Male	6	Director	12 years	No	BA
Frank	Male	6	Principal	3 years	Yes	Ed.S.
Grace	Female	5	Director	8 years	No	BS
Hal	Male	7	Headmaster	6 years	Yes	MS
Iris	Female	6	Principal	12 years	No	BA
John	Male	9	Executive Director	none	No	BA

**Ann**

Ann grew up with parents who were educators. Her father was a school principal and her mother a teacher. In college she studied anthropology. Midway through her Sophomore year, feeling a lack of direction and inspired by her parents, she decided to change her major to education, and minored in anthropology. After college she got a job teaching physical and cultural anthropology at a high school in northern Virginia. Since then she has worked in many settings, including public and private schools, alternative education, at-risk youth, Job Corps, Outward Bound, and others. She went back to school to obtain her master's degree, with an interest in curriculum design and she thought she would like to teach new teachers in a teacher

preparation program. She changed her focus and obtained a degree in Educational Leadership after a professor asked her to collaborate on creating an outdoor education initiative. Her husband was offered a career opportunity teaching at a university in Utah, and after moving west, Ann was hired as the director of a Utah charter school. She was the director of two charter schools over six years. She left charter school administration for a university position in 2018. She said, “My mom was worried about the 50% pay cut, and I say ‘No chest pains!’. My husband said ‘Stop this. You cry every night, you complain all the time: find a new job, we’ll make it work.’”

### **Beth**

Beth is the child of a father who was a military officer and a stay at home mother. While growing up she moved around the country frequently. She attended college in Florida, where she completed a BS in nutritional chemistry, and an MS in chemistry. After working in research, she and her husband moved, for his job, to a small town in Arizona where she was hired as a high school science teacher.

Three years later, she began a program in her district, training to become a district instructional coach. She enjoyed collaborating with teachers in that role, and it allowed her to spend time in different classrooms. After six years of instructional coaching, she became an assistant principal at a district school. Three years later, she became the director of a charter school in Arizona, a position she has held for 5 years. There are things she likes about charter schools, and others she misses from her district experience. She said in a district,

You have all those teams that take care of facilities, that take care of athletics, all things that now I have to manage. You have those teams in a district and you get to be the educational leader. Now, I get to be that person maybe for 10% of my week.

## Colby

After completing an undergraduate in American Studies, Colby planned to get an MBA. When his wife was accepted to Arizona State University for a master's degree program, they moved to Arizona. When they had their first child in the first month of her program, Colby became "Mr. Mom", as he termed his position as primary care giver. He found a job as a teaching assistant in Special Education that fit the family schedule. He worked with a group of students in a life-skills program for high-needs children with disabilities. The curriculum was strictly scripted. Although he saw the deft structure of the curriculum and began to see and respect "the why" behind the scripted material, he also noticed it was not working, and began to tweak his delivery. Despite some signs of success, he got in a little trouble for making changes, but his interest in curriculum persisted. "What was interesting was that this highly scientific, research-based thing, that is smart and thoughtful, why isn't that working?" Without an intention to work in K-12 education, he enrolled in a doctorate program in instructional design and human-learning theory. The curriculum was not an educator preparation program, fully, but a cross curricular exploration of human learning, housed in a department of education in conjunction with the psychology department. With his Ph.D. completed, he became a professor at a Catholic university in New England.

In this position he began an ethnographic research project looking at a group of five third through fifth grade teachers developing and implementing a new experiential learning model. After 14 months of the project, one of those teachers left the school, and they asked Colby, half-jokingly, if he would come and teach with them. He accepted. This group of innovative educators began looking at the process of opening a private school, and came across what was, in 1995, a new concept: the charter school. The group founded a new charter school in Michigan,

authorized by a university. After two tumultuous years, Colby became the school director. After 11 years at the school he helped begin, Colby moved to Utah to create another charter school, which he has led for 12 years.

### **Donna**

During Donna's last year of college, she began to think education sounded interesting to her, but she could not change her degree in time. She started a home-school cooperative for about a dozen of families in her area, with some noticeable success. She became a para-professional educator, then moved to Utah to accept a position teaching middle school Social Studies at a charter school. She was very successful as a teacher and she loved her students and her work.

She said:

Teaching was incredibly fulfilling and energizing. I did not get drained by student issues; I was energized by the opportunity to help. It was fun and it was play time, and I loved it so very much, and I was good at it.

Parents of her students began persuading her to move into administration to have a broader influence on the lives of students. As a single mom, she was also attracted to the increase in pay.

### **Evan**

Evan began his career with a degree in social work. After working in family counseling and with at-risk youth, he moved into school counseling. While assigned to a school, he felt he might like to teach, and moved into a position teaching middle school math. After a dozen years in the classroom, Evan accepted the role of assistant director. In hindsight he feels that move may have been mainly inspired by ego. His school expanded, opening another campus. When his school director was promoted to executive director to oversee both schools, he was driven to move into the vacant building director role. "I didn't want someone else to come in and mess up

what we had accomplished, so I decided to go for it.” Evan became the charter director in his building. He has been a school leader for eight years.

### **Frank**

Frank began his career as a child-psychologist. He found the work emotionally difficult, and after some investigation into engineering and law, decided to begin teaching. He said, “Making a whole lot of money wasn’t the most important thing in the whole wide world, and teaching had some of the same attraction as the social work with less of the heartache.”

He felt dissatisfied. Surrounded by colleagues he felt were happy just to monitor behavior and teach to the test, he decided to become an administrator to have a broader influence to create engaging educational opportunities for children. He has led a charter school in Idaho for six years. Compared to the experience of his friends leading schools in the district, he feels the charter school is more agile and flexible. According to Frank, “If it’s a good idea, and we have the budget to do it, we do it”.

### **Grace**

Grace started as a high-school social studies teacher. She taught for five years. She said, “It was really important to me to teach kids why, to give them context and background knowledge, to make good choices as citizens. I felt I had impact.” She struggled with the attitude towards grading at the district, very concerned about grades and test scores with a newly heightened focus on school accountability. Though most students had low end-of-year test scores, the district encouraged grading on a scale. Students with below grade-level test scores had A’s and B’s in their coursework, which Grace described as lacking rigor. Looking for an educational model she believed in, she moved to take a position in the administrative team at a new charter school. After several years as a teacher leader she became the school’s director. She



moved to a new charter school four years later to become the founding director. She has held that role for five years.

### **Hal**

Hal had a tough time as a teenager and was in and out of trouble for drug use, fighting and truancy. He was close to dropping out of high school. A counselor convinced Hal to take summer classes to reclaim credits. His summer-school social studies teacher made a strong connection with Hal, and he turned his academic career around. He finished college and began teaching high school history classes. After 4 years, he received encouragement to take an administrative internship during summer school. After two years as summer-school principal, on top of teaching, he finished a master's degree in educational leadership. He and his family moved to Colorado, where he became the founding director of a charter school.

### **Iris**

Iris spent 12 years teaching in the primary grades, kindergarten through third grade. For the last four years of her teaching experience, she also served as primary team lead. Some parents of her previous students approached her as someone whom they trusted and respected, and asked her to serve on the advisory board for a new charter school that was opening in Utah. Once the state awarded them a charter, Iris helped begin the search for a founding director. Several months into the process the school board members offered the position of founding director to Iris, and she ultimately accepted. She has served as director for five years.

### **John**

By trade, John is a surveyor and construction project manager. He served as a volunteer board officer for the Utah charter school his children attended. When there was a sudden administrative vacancy and a bit of chaos at the school, John stepped into an interim director role

at the board's request to provide some stability in the administration until a new director could be found. John's skills in leadership and organization proved beneficial to the school, in both faculty and student culture. He found he enjoyed the work and stayed on, serving as school leader for nine years.

## **Results**

This transcendental phenomenological study to understand the impact of stress and burnout on charter school leaders in the western United States was guided by four research questions. Analysis of the data revealed six major themes and 16 subthemes, stemming from 77 identified codes. Major themes included conflict with local school boards, enrollment issues, problems with student behaviors, physical health, mental health, and the scope of the job of charter school leader. The themes, subthemes and codes are found in Table 4. The four research questions guiding this study used the lens of the identified themes and sub-themes, as derived from a summary of participant interview responses during individual interviews, the single focus group interviews, and the on-site observations. The following section is organized thematically and according to the research questions of the study.

Table 4

*Themes, Subthemes and Codes*

<b>Major Themes</b>	<b>Subthemes</b>	<b>Codes</b>
Conflict with Local School Boards	Role Ambiguity	Tension Board Chair Unpaid Volunteers Little Background in Education Overstep Conflicts of Interest Oversight
	Board Meetings	Founding Board Governing Board Fear of Termination Vision Versus Reality
Enrollment	Parents	School of Choice Entitlement Funding
	Entrepreneurial	Marketing/Branding Customer Service Educating Parents Educating Community
	Resources	Extracurricular Activities Honors/AP Busing
Student Behaviors	Difficult Students	Last Chance Special Education Lack of Resources
	High-Performing Students	Bored at District School Differentiation Engagement

<b>Major Themes</b>	<b>Subthemes</b>	<b>Codes</b>
	Non-traditional Staff	Classroom Management ARL/APT Inexperienced Teachers
Physical Health	Health Effects	Heart Inflammation Fatigue
	Health Habits	Sleep Exercise Eating Habits Medication Self-Medication
Mental Health	Isolation and Loneliness	Island Leadership Confidant Burden Anxiety
	Burnout	Desperation Apathy Aversion to Contact Depression Work/Life Balance Personal Relationships
Job Scope	Interpersonal Relationships	Constituencies Conflicting-Interests District City County State Federal Test Stress Parents Students Faculty Staff Press

Major Themes	Subthemes	Codes
	Business Manager	Budget Investments Finance State Law Federal Law Special Education Law
	HR Manager	Salaries Benefits Hiring Firing Training
	Facilities Manager	Contractors Fire Codes Lawn Care Snow Removal Pest Management

### Major Theme One: Conflict with Local School Boards

The first major theme identified during data analysis was the stress resulting from interaction with local school boards. Seven of ten participants described the local school board as the number one cause of stress, and all participants named board relations as among the top three stressors. The first subtheme within the major theme of stress resulting from interaction with the local school board was role ambiguity. The second subtheme within the major theme of stress resulting from interaction with the local school board was the stressful nature of board meetings. Included in the discussion of this first major theme are the two subthemes: role ambiguity and board meetings.

**Role ambiguity.** The first subtheme to emerge within the major theme of stress related

to interaction with the local school board was role ambiguity. Role ambiguity between school directors and governing board members was cited as stress-inducing by 70% of the participants, in both individual interviews and in the focus group interview. During our debrief, commenting on an interaction I witnessed during an on-site observation, Colby noted, “Without a doubt, the biggest source of stress, because of the unpredictability and capriciousness of it, is our board.” Nationally, individual school districts are classified as Local Education Agencies (LEAs), each with a Board of Education. Each charter school functions as an individual LEA, with a local School Board, a governing body to oversee the LEA. Frank said:

Really, as a charter school principal you are also the superintendent of a tiny district, with your own board and I didn't understand very well, it was not in any of my master's in educational leadership classes, how that worked. The roles weren't clear between principal/superintendent and board member, and that was a big surprise.

Based on participants described experiences, almost all members of charter school boards are unpaid volunteers, and almost all are parents of children who attend the school. This dual role as parent and local school board member can lead to tensions, a point raised repeatedly in individual interviews and in a discussion during the focus group interview. Teachers are often nervous to have the children of board members in their classrooms. In individual interviews, participants described instances where board members tried to use their position to influence or intimidate teachers and staff, Hal corroborated this in the focus group interview, saying:

Our board was a big problem, the chair essentially thought she ran the school- she was telling the PTO president what to do, she wanted to do classroom observations of teachers – I mean crazy stuff. I spoke up, and she wanted me gone. This was my first year, and I was already looking for new jobs.

Board members have great power and responsibility, and when they attempt to overstep their roles in order to do what they believe is in the school's best interest, conflict can arise. Participants all agreed that volunteering on a charter school board is time-consuming, and a significant commitment. These volunteers, most with no experience in the field of education, often push for actions or solutions that do not demonstrate a full understanding of the complexity of running a school.

There were pervasive and frequent descriptions of interactions with boards having an “us-versus-them” feeling, as though there were a struggle for control of the school, and board members and administrators had inherently different and mutually exclusive goals. The school board at Hal's school had some complaints about several of the office staff, concerns that they shared with Hal. He discussed the issues with the employees in question, and developed improvement plans for them, with concrete goals and explicit timelines. The board members felt dissatisfied with the lack of immediate action, despite Hal following the employee improvement policies the board itself had developed.

Board members came into the school as a group, during the school day and in front of students, and fired the office staff, unbeknownst to Hal. He offered his resignation, potentially ending his tenure in exchange for the office employees return to work. He recalled thinking:

How can I manage a building of teachers if they believe that at any time they can be fired, in front of their students, at the whim of a board member? Who in their right mind would want to work in that situation, for those sort of people? I was a history teacher, and I have taught over and over to kids how power can corrupt. That was evident at that school. They loved trying to bully the office, bully teachers, try to bully me.

In this instance, the board relented, and the office staff returned to work. One year later, Hal was fired. After Hal shared his story in the focus group interview, Donna reiterated something she mentioned in her individual interview. Her school was mismanaged by a founding board, who insisted on using a management company that was expensive and ineffective, and run by a family member of a board trustee. Asked about the most stressful aspect of her relationship with her school board, she stated:

The top one for me was being asked to do what I considered unmoral and unethical.

Power-tripping board members were pushing. The stress had become so bad – they were asking me to do things that I would not do. The board-selected management service company, their fee was unbelievably high – they kept messing up, making the situation bad for us, and asking me to fire teachers and double up our class sizes so we could pay the service fees. That is wrong for everyone. The stress from that was unbelievable.

**Board meetings.** The second subtheme to develop within the main theme of stress resulting from interaction with the local school board was the stressful nature of actual board meetings. Though issues stemming from subtheme one, role ambiguity, are the heart of the stressful nature of board meetings, the meetings themselves are a reported cause of stress, as tensions and conflicts stemming from role ambiguity are manifested in a concentrated, intense event playing out in a very formal and public forum. Participants described board meetings as combative, tense, inefficient, contentious, frustrating, stressful, and over-long. Eight participants described board meetings that routinely went on for six hours or more, often well past midnight. The description of board members ranged from naïve, uniformed, and unrealistic, to loud, irrational, and abusive. Hal described his board meetings as resembling the inquisition, saying:



I would be sitting there at a student desk they set there for me. I'm a big guy, and I had a student desk, facing the panel of board members at their conference table, and they would shout at me, degrade me, degrade teachers and argue with each other.

Beth noted that in a traditional public school, in a district, she had gone to monthly school board meetings. The superintendent and the board members took their roles very seriously and wanted to make meetings efficient and as short as possible, while getting business completed. She said:

You could tell that for the most part, everyone there knew exactly what was on the agenda, and how they wanted to vote. All the discussion was done outside the meeting, before it even started. My charter board, they want to argue every point, over and over again, shouting and yelling. Nothing like that ever occurred in the district, not at the actual meeting. All that strife was behind the scenes. Parents come to our board meetings now, and I am so embarrassed.

Beth's stress levels increase significantly beginning the Friday evening before their Tuesday night board meetings. She reported:

I have been here at this school, doing this for six years, and still at every board meeting, I am ambushed, I am blindsided by something or someone. I continuously wonder whether or not this will be the board meeting when they fire me.

Five participants explicitly said that for years, they expected to lose their jobs at any given board meeting. In two instances, this continues to be true, and one director who participated in this study, Grace, lost her job since our interview, after five years at the school. Beth resigned on the last day of school of the 2018-2019 school year to take a central office position in a nearby district, saying she was not willing to work for her school board any longer.

Donna was helping some colleagues found a new charter school, and when they approached her to be the founding director, she refused, instead expressing interest in a curriculum development role. She said:

I declined the director role very consciously, because I had seen it over and over and over: first year charter directors, they are scapegoated by inept boards, and they don't make it past a year. There are so many ways to mess up. There is a massive list of things you can do wrong that have critical consequences. I am not going to get in there and be scapegoated and lose my job- I stepped back, I got to learn the ropes, and not to deal with "The buck stops here."

After his board fired Hal, he went back to a district school. He said:

There is no amount of money that someone could offer me to work for a charter board again. The egos, the in-fighting, the lack of competence is crazy – and there is no recourse for faculty if they [the board] choose a wrong path.

### **Major Theme Two: Maintaining Enrollment**

The second major theme to emerge from data analysis was the stress tied to maintaining student enrollment. The first subtheme identified with the major theme of the stress of maintaining student enrollment was the stress caused by dealing with students' parents or guardians. The second subtheme to emerge with the major theme of the stress of maintaining student enrollment was the stress caused by marketing and branding. The third subtheme in the major enrollment theme was stress concerning the scarcity of resources, and the effect that scarcity has on enrollment efforts.

In each of the individual interviews, and in the focus group interview, all participants mentioned maintaining enrollment as being a significant cause of job-related stress. According

to participants, the perception is that charter schools in Utah, Idaho, Arizona, and Colorado receive funding from the states at rates much below their district counterparts, which makes enrollment a constant stressor.

For participants who came to charter schools after some district-school experience, this was a surprise. During her individual interview, Beth said, “At the district, we almost never discussed enrollment. If they needed to close schools or close classrooms because demographics of the neighborhood changed, or whatever, we knew we’d be assigned jobs in other buildings inside the district.”

All ten participants work at schools where every employment agreement prominently states that salaries and benefits are contingent upon funding, which comes from maintaining enrollment, which is stressful for all staff members. Frank said, “So many aspects of enrollment are beyond my control, but ultimately I am held responsible, and not just for my job, but the jobs of everyone who works here.” Furthermore, Grace explained:

Open enrollment is a constant stress. Our numbers are way down in the middle school, and I’ve got 100 kids waiting to get into third and fourth grade, which are overfull because I have to stuff classrooms there to make up for the middle school.

Over-enrolling in some grades to make up for small numbers in other grades was a common stressful practice. It increases some class sizes, which can lead to lower student outcomes, lower parent satisfaction, and increased teacher turn-over, all of which causes families to leave, which decreases enrollment. It becomes a cycle that constantly causes stress.

**Parents.** The first subtheme to develop within the major theme of the stress of maintaining student enrollment was the stressful nature of interactions with the parents of charter school students. Parents can be difficult to deal with for many educators, according to

participants, and charter school are particularly difficult. Often families wait for months or years as their children move through a school's lottery system until a seat becomes available. There is often a perceived exclusivity to attending a charter school, especially one viewed as successful. Parent involvement is strongly encouraged at all the schools of the participants of this study. In eight of the ten schools, the recommendation for parent volunteerism is a minimum number of hours per parent. That level of involvement can lead to a sense of entitlement, especially as parents know that student retention and enrollment numbers are such important concerns for school leaders. During the focus group interview, Hal said this:

There is, I think, a strong sense that the parents are in charge. They feel – many of them feel - entitled to demand things, things that at a district school, no one would ask for or expect.

Colby agreed, saying “as schools of choice, parents can choose to enroll their kids in our school, and just as easily choose to pull them out- it happens all the time.” Feeling subject to market forces and the competition presented for customers from district school and other charter schools was stressful for participants. This concern was mirrored in each individual interview as well. Frank felt that too many parents expected that their children would never be accountable for their behavior, their non-compliance, their lack of work, or lack of respect

Evan mentioned how the difficulty in dealing with parents is worse by being the charter school leader:

On my first day as director, I had a mom come in and yell at me for half an hour. I mean, I had dealt with that before, but as a teacher, or as assistant [director] I could say, after ten minutes, ‘You should speak to the director’. The weight of final responsibility surprised me. I didn’t know how big a difference it would be.

As a teacher, Frank dealt with difficult parents, but only one or two per year. As director, he deals with one or two difficult parents from each classroom, in a school with 20 classrooms. These interactions are a constant interruption to his work and to the flow of his workday, keeping him from tasks that he feels he should be performing as the school's instructional leader.

I find that dealing with parents is really hard- even some of my teachers who are parents at the school, when they have something that happens with their kids, even they become irrational. It frustrates me that my whole gig is trying to make rational decisions based on evidence, but there is so much emotion attached to this work.

This inspires a higher level of concern when considering that parents make up either all or primarily all the charter boards as described by participants. Frank said:

Parents as board members is a terrible idea. Especially if you're needing to discipline a teacher. More than half the board have had kids in the class of that teacher- they already have a strong feeling, for or against that teacher. Same with expulsion hearings for students- how can a group of parents not be somehow biased? I feel like we can be sued for any of those expulsions, because they were judged by people who cannot help but be biased. 'My kid was bullied by that kid', or even 'my friend's kid was bullied by that kid' - you can have degrees of separation, and still be biased, especially in this small school community.

Parents come to charter schools for assorted reasons, and then often struggle with that decision, publicly with staff and other families. "When I see a group of parents congregating in the parking lot, waiting for dismissal, I get a hole in the pit of my stomach" said Donna. "Or a group at Walmart!" said Iris. Participants lamented having to educate and then constantly re-

educate families about the things that make their schools different, and why those differences are important to the school. During the focus group interview, Grace said:

I think, like a few of you, we have multiple-age classrooms, something we really talk up when we recruit new families. Then, you know, after her kids have attended for a few years, there's the mom who says 'What? My 2<sup>nd</sup> grader is in with 1<sup>st</sup> graders?', and I have to explain it to her, convince her about it all over again.

Participants comments showed that they spend a substantial portion of their day catering to or mollifying parents. "We have to listen to them, to their every whim, and talk them down, because I am always, always worried about numbers," Hal mentioned, speaking of the need to maintain student enrollment at capacity. Iris summarized the situation in this way:

Parents move their children sometimes every year, sometimes twice in one year, based on a teacher they don't like or a math program they don't like. They feel like a charter is a private school they don't have to pay for.

Participants agreed that many parents come to charter schools with unrealistic expectations. Recruiting students entails highlighting what makes a charter school different and lifting up the research supporting the practices a school uses, and how those ideas have helped some students achieve better outcomes. Hal said:

I certainly do not lie to parents, but I am trying to convince them to come to our school instead of the three others down the street. They sometimes come in expecting miracles, that whatever problems existed at the last school, with the students, with the family, with learning challenges, are somehow not going to follow them here. We do our best to help address those problems, but it's a process. A long process. They're not prepared for that, they get disillusioned, and then start looking at the next school.

**Marketing and branding.** The second subtheme to emerge within the major theme of stress related to maintaining student enrollment was the stress stemming from marketing and branding. One of the roles charter school directors have been surprised to find themselves in is advertising. Unlike traditional public schools, charter school can and must draw from a wide geographical area, pulling families from multiple traditional public-school districts. Reaching potential families in the current media environment is complex, time-intensive, and often expensive. Colby shared:

We have tried multiple media to reach out to new families. Billboards are very expensive. We've had to add a marketing line item to a budget that was already very tight. Of course, social media is a key method of publicity, but the metrics show that we need to post to all the platforms at least once a day to be in the highest tier of contact, on Facebook and Instagram and Twitter. There are some I don't even know what they are. Putting out that much content every day is a very time-intensive practice. At least an hour a day. More. I was not very savvy with social media. I had to get help from the student council. Billboards are expensive, and entrance and exit interviews with families told us they are very ineffective. It is complex.

Other participants shared accounts of similar struggles to maintain student enrollment. Beth's school hired an outside marketing firm at great expense, but with minimal increase in student enrollment. Referral incentives for current students who refer new students were collectively deemed a failure at the focus group interview. In individual interviews, five participants said they suspected the best source of new students is word of mouth from existing families.

**Resources.** The third subtheme evident with the major theme of student enrollment was

the scarcity of resources. Charter schools receiving funding below the level that traditional public schools receive. Hal explained, “Utah sends the WPU [weighted pupil unit, the per-student funding amount] to the district within which the charter resides, and then the districts send just under 70% of that to the charter.” Additionally, charter schools receive no funding for transportation. Nine participants reported having no busses, while one school had one used bus used for field trips. Parents of charter students dropped off and picked up their children each morning and afternoon. Field trips, too, rely heavily on parent drivers. John said:

If we want to take 100 kids to the museum, that is a lot of parent drivers. That is a lot of background checks, insurance cards need to be copied, driver’s licenses verified. It is timely and expensive. Then, parents burn out from driving to and from school at eight and three o’clock and it is hard for working families. Driving on field trips gets old.

They are tired. Gas is expensive.

Less funding also means more difficulty in offering teachers and other staff competitive salaries. This makes hiring and retaining employees difficult. Iris said:

Most of our aides are the moms or our students. They like working the same hours that their kids are in school. So, they don’t mind the \$8.50 per hour pay. We train them, invest in them, and they develop strong skills. Then they are offered jobs at a district school for \$14, and they leave. We start over with a new mom. That is the cycle.

### **Major Theme Three: Student Behaviors**

The third major theme to emerge was the stress caused by managing student behaviors. Dealing with behavior issues was stressful for every participant, especially ensconced within second major theme, the concern about maintaining student enrollment. According to participants, charter schoolteachers can become frustrated dealing with student behaviors that in



traditional public schools may more quickly lead to expulsion. Most leaders mentioned that charter schools, as schools of choice, often draw students who were unhappy or unsuccessful at traditional public schools. Students who felt bored and unchallenged look to charter schools for more engagement. Students with consistent behavior problems look to charter schools as a last resort. Students who qualify for special education and feel under-served look to charter schools. “We get kids that were bullies, we get kids who were bullied” said Grace. It can, according to participants, be extremely difficult to meet the needs of these very different populations of students, in a single building without the network of district resources. The interviewees also indicated that often, they must manage this with new teachers with non-traditional paths to teaching, with no formal schooling in education.

**Difficult students.** Participants reported that teachers often find that charter school administrations are willing to, or feel compelled to, work more extensively with families to try and correct behaviors to help students be successful. To a point, participants felt that working more with struggling or disruptive students and their parents was a positive aspect of charter school leadership. When administrators seemingly ignore persistent misbehavior, however, teachers can feel helpless and unsupported. Donna said, “It is a very thin line, a tight rope. I have to worry about enrollment numbers, I have to keep parents happy, and I have to support teachers and maintain order in the learning environment.”

Beth said:

We just built a padded room. Super expensive, ridiculously expensive- we are putting kids in this room where they rail and bang themselves against the floor. We don't have the capacity to provide an appropriate education to such a broad range of kids with high needs.

Despite training, and preventative measures and structures in place, behavior problems still overwhelm all the participants at some time. Grace shared, “Last week, I had one-hundred office referrals. We only have 400 kids.”

**Non-traditional staff.** The third subtheme within the major theme of student behaviors was teachers who follow non-traditional routes to teaching. With a growing teacher shortage, states have created various alternative routes to teacher licensure. Grace said:

They come and they say ‘will you just give me a chance, I have always wanted to teach’ and they are dealing with some of the most difficult classrooms around. I see it in every classroom- three or four kids that teachers have try to contain, or try to ignore, that are not engaging [in the learning] and disrupt the classroom constantly, and will continue to be a problem if we don’t “therapy” them, and we can’t do that- not well, anyways.

With a teacher shortage, and with the legislature creating more untraditional paths to licensure, Beth agreed that charter schools may be more willing to collaborate with non-traditional teachers. Similarly, non-traditional teachers are drawn, it seemed to participants, to charter schools, and yet they may struggle with classroom management.

#### **Major Theme Four: Job Scope.**

The fourth major theme that became apparent during the analysis of the collected data was the overwhelming scope of the responsibilities of the charter school leader. The scope of job responsibilities and skill sets necessary for charter school leadership are broad and varied. As Bauer and Annenson (2010) reported, the responsibilities for a school leader have grown beyond purely bureaucratic tasks to encompass both administrative and instructional tasks. In charter schools, most or all of this expanding number of duties fall on the director. Colby remembered:

I came to the school with the title of curriculum designer. I moved my family, we drove a thousand miles, and the whole way, I was thinking, like a fool, I am going to sit by that little pond on campus, like a little Thoreau, and write curriculum, listening to the loons, living life deliberately.

He soon realized what every participant at some point in our discussions mentioned, that the scope of the work requires that leaders take on many roles. Numerous studies have surmised that school leadership is one of the most demanding, difficult and complex executive roles in the country. (Battle & U.S. Department of Education, 2010; City et al., 2009).

**Multiple roles.** The first subtheme to emerge from within the major theme of the challenging job scope of being a charter school leader was the necessity to fulfill multiple roles. According to participants, in a stand-alone school everyone takes on many roles. Participants described having to learn certain skills that came as a surprise, to fill unexpected roles such as counselor, janitor, psychologist, contractor, accountant, fundraiser, HR manager, family therapist, IT support, inter-personal mediator, Medicare expert, financial manager, building and physical security officer, public relations and advertising manager, and social worker, among others. Ann said, “The charter school director is really the CEO, the principal, the CFO, the school nurse, the school psychologist, HR – you know, you’re everything rolled up into one, and you’re expected to keep your cool the entire time.”

Colby got to the campus in the woods with a pond, and found the school had no money, a lease on a property that was not a school, was not up to code, and was set to open in four months. It was the former summer house of a wealthy family that turned into a residential substance abuse clinic. He began trying to rally parents who were contractors, carpenters and plumbers to

donate time to the school, and he had to learn the intricacies of fire suppression systems, dealing with electricians, concrete contractors, painters and carpenters. He said:

I am doing all this, with no background in any of it. I am suddenly a facilities manager, who also has to write curriculum, be an HR manager to hire and train teachers, recruit students- it was four full-time jobs.

**Human resources.** The next subtheme within the major theme of the stressful job scope of being a charter school leader was the need to perform human resource duties. Without a human resources department, it falls to charter school leaders to seek, hire, train, support and sometimes fire teachers and other staff. Seven of the participants all helped start new charter schools and described similar stories. Their work as teachers, or in other fields, did not prepare them to find, interview and hire quality teachers. All participants called supporting struggling teachers a challenge, as each struggling teacher needs a differentiated form of training and different kinds of support. Colby said:

We say things like ‘That teacher is under water’. We might have several struggling teachers in the building at any time. It takes a lot of time to be in that teacher’s classroom, make observations, decide what the deficiencies are, and create a TIP [teacher improvement plan]. You’re trying to get someone to change some fundamental things about the way they work, and support them in that, and that is a process. It’s slow and methodical. And, you have parents coming in with complaints, and you see learning suffering. People need time and support to improve, but there has to be a timeline.

Firing unsuccessful teachers was a stressor for each participant and described as personally traumatic. Several participants felt having to fire someone was a personal failure causing guilt, that if they had just been able to explain things in a different way, or had spent

more time supporting this teacher, they would not have been forced to revoke this human being's livelihood, their means to support their family. Participants reported feelings of guilt that last long after the termination occurred. Grace said:

Firing teachers is the worst part of my job. You second guess yourself- did I give this teacher enough time and support to improve? Is this somehow my fault as a leader? Is it my fault this person is losing her paycheck, her livelihood?

Additionally, firing employees strained relationships in the school, damaging the school culture. As Donna noted:

You let a teacher go, and she is a lovely person, and you can't share the reasons you have for firing them. People are angry with your decision. That is so difficult, you are unable to disclose why you had that decision, all you can do is take whatever terrible things they have to say about it and absorb it. Then everyone else feels like they are going to be fired too. Parents are angry. Students ask why you fired the teacher. It is awful.

**Interpersonal relationships.** Another subtheme within the major theme of the stressful job scope of being a charter school leader was dealing with a broad spectrum of interpersonal relationships. Participants described many difficulties with diverse interpersonal relationships and in fulfilling multiple roles to keep many distinct groups of stakeholders satisfied. The stress described by all participants led in most cases to periods decreased job-performance. Daily, participants described interacting with students, teachers, parents, support staff, and community members. Interacting successfully with each group is different and takes a different set of skills. Also, members from each of these groups of stakeholders interact with each other, sometimes causing tensions that the school leader must resolve.

In dealing with these diverse groups, leaders feel torn, or pulled in many directions, as each group has different and often conflicting expectations. Participants felt that they are forced to make decisions, often time-sensitive decisions, for which they do not have enough knowledge or understanding to make, knowing that whatever decision they make will leave a portion of people dissatisfied or angry. As Frank explained:

On my performance eval – the staff and parent survey portion, on some questions, I have 85% approval and still, I need to have a plan to address that other 15%. A lot of that is unreasonable. There is the mindset of constant improving, but it can be confusing, like communication to families. Results are: 30% say too much communication, 30% say not enough communication. That’s just one example, but it’s the same across the board.

Working with these constituencies and their varying expectations places many different demands on a charter school leader each day, and the type of issue or conflict that might surface each day is unpredictable. The only given is that issues and conflicts will surely arise. As Evan explained, “I have 60 employees, 500 kids at my school, and about 1000 parents, so the chance that someone somewhere does something that ends up in my office is 100%. Every day.”

Participants shared having to deal with several significant and difficult events each year. A popular art teacher at Grace’s school was murdered. She had to deal with her own trauma and grief, while simultaneously leading the school community through its own grief and trauma. The whole time, she reported thinking, “I don’t know how to do this. I have no training for this. I have no emotional resources to do this.” Colby summarized with this:

I constantly have to troubleshoot the myriad of problems that are always going on- it could be state problems, or math program problems, or marriage problems, or whatever,

but the stream is endless, and your standing tasks for the day are repeatedly interrupted by fires to put out.

All participants shared comparable stories: Students commit suicide. Teachers commit suicide. Teachers die. School families die in car accidents. Students' families go through divorce. Teachers' marriages fail. Families become homeless. Students live with abuse. In each instance, the study participants feel responsible or feel expected to be involved in some plan for resolution.

### **Major Theme Five: Physical Health**

The fifth major theme to develop through analysis of the data was the detrimental health effects that stem from the job-related stress of being a charter school leader. Maslach, Schaufeli and Leiter (2001) have established the clear link between job-related stress and poor health, and studies such as Philips and Sen (2011) indicated that job-related stress levels are higher in education than in any other industry.

Health issues were a concern for all participants. Stress can cause elevated blood cortisol levels, as the body reacts to stressors by increasing fatty acids and blood sugar to support the stress response (Simmons & Nelson, 2001). Nearly all health concerns have a causal relationship to the stress caused by the work of being a charter school leader, and even health issues that can only be correlationally related to job stress reported to be exacerbated or prolonged by stress and the effects of stress.

Various participants described the stress levels as high, intense, pervasive, continuous and in two cases, debilitating. Seven participants related conversations with medical professionals about the health impacts of what doctors warned was continuing stress, including the chronic inflammation which results in many serious health risks, and impedes rest, healing,

cognitive functioning, and which promotes agitation, insomnia, irritability, and poor health habits.

**Health effects.** Another subtheme that emerged from the major theme of physical health, was health effects. Four participants described periods of having to wear heart monitors throughout the work-day due to stress-related heart palpitations or chest pains. Because of the chronic inflammation due to stress, one participant underwent two years of intensive gum-work to treat severe oral pain and prevent tooth loss, while another began losing her hair and suffered disrupted, irregular, and painful menstruation cycles. One participant, after a particularly stressful board meeting, had the retina of her left eye detach while driving home, a blood-pressure related condition that continues now, two years later. Surgery to repair the eye has failed twice, because, according to her doctor, the chronic inflammation resulting from stress prevents the eye from effectively healing.

Ninety percent of participants reported either very frequent or prolonged periods of sleep issues, the effects of which degraded job performance, and both personal and professional relationships, the pain of which increased job-related stress in a cycle of self-driven escalation. Job-related stress caused insomnia, difficulty in falling asleep, or difficulty sleeping through the night. Frank said, “A lot of nights, maybe most nights, I wake up in the middle of the night, and I do not go back to sleep.” Over time this leads, in the described experiences of participants, to increased alcohol consumption, drug use, over-eating, lack of exercise, and the overall degradation of mood, productivity, happiness, and job-satisfaction.

Evan left a school leadership role and went back to coaching teachers, accepting a 40% pay cut. The loss in income was significant for his family, but he feels it was worth the change,



and his wife agrees with him. He realized after two weeks that he had begun dreaming again. “For five years – no dreams. Stress! No deep sleep, no REM sleep. Now, I sleep all night.”

Donna was so debilitated by stress, that for three years out of the last five, around mid-March, she checked herself into the hospital at night for treatment for mental fatigue, anxiety, and physical exhaustion. Afraid to show weakness to her board or her teachers, she came to work during the day, and returned to the hospital at night. No one at her school has ever known about this. When asked about health, Grace snorted. “Prozac. Weight gain. Weight loss. Huge weight gain. Two tumors. Prozac.” Grace underwent treatment for a tumor, and after another year, a second tumor appeared. They are benign, and not caused by stress, but she reports that her doctor told her:

I know what you do, and what your life is like. It is what most people would call damaging and unsustainable, and we have to consider that stress is hindering your body’s response to the tumors and your overall health.

Grace left her job as school director mid-year, during spring break of 2019, after being asked to resign by her governing board. During our interview, five months before her forced resignation, she said, “I don’t feel like I have to prove anything. I’ve done this 13 years. Is it sustainable? I don’t know. I don’t fear losing my job. Because it’s a hard job. It might be a relief.”

**Health habits.** The final subtheme under the major theme of physical health was health habits. Five participants described unhealthy eating habits: skipped meals, fast food, highly processed foods that are convenient, and sugary drinks and snacks, often bingeing. Seven reported having little time or energy for regular physical exercise. Six participants reported taking prescription medications for anxiety, depression, or sleeplessness. Five reported increased

alcohol consumption. One participant, fearful of her fellow Mormons seeing her parked at a liquor store, began making her own beer and wine at home. Two participants admitted to regular marijuana use, one in Colorado where it is legal, and one in Utah, where it is not.

### **Major Theme Six: Mental Health**

The sixth major theme parsed out through data analysis was issues with mental health. Just as stress impacts the physical body, it creates concerns for participants' mental health. Five participants sought therapy to help manage stress. Two described severe bouts of depression. Participants reported feeling isolated. All participants discussed periods in which they felt they were experiencing levels of burnout. Most participants described feelings which Donna expressed very succinctly, saying "I was questioning myself whether I was burnt out, whether I wasn't the right person to do this, whether I hated education in general."

**Isolation and loneliness.** The first subtheme within the major theme of mental health was isolation and loneliness. According to Izgar (2009), loneliness is when an individual's detachment from the outer world affects their emotional well-being. The fact that charter school leadership can be a lonely and isolating job was a significant theme that arose during data collection and analysis. Homes (2016) called this phenomenon executive loneliness, the persistent sense that school leaders have to be knowledgeable, confident and strong while meeting the challenges of the day with empathy and grace, constantly working to meet the need to seem infallible. This can cause leaders to feel they can never display any human frailties, and that they have no one with whom to confide in, vent to, or seek help from.

Nine out of 10 participants described loneliness and isolation as a challenge causing stress. The one outlying participant who reported not feeling lonely, Evan, works at one branch of a school that has two campuses, set up like a mini district. He confers daily with the other

building director, and their executive director, who sits over both schools as the LEA executive director (superintendent). The other participants described running a single, stand-alone charter school as very lonely. Colby said, “We were an island- we weren’t part of a network. I think as much as anything, my feelings of burnout were from a combination of stress and boredom- both couched in that sense of isolation.”

With funding being a constant challenge, charter directors are often alone in an administration of one, without a peer to discuss problems with. During the focus group interview, this was a main topic of discussion. “I tell you what,” reported Colby:

That was very, very tough...I think the isolation is a big deal; being isolated, you need to find somehow to make connections. I needed to talk to someone who could know everything- that was dangerous because at first that person was a teacher, for me. It’s lonely, and no one understands how lonely, or in what way, even if they think they do.

“That’s right!” agreed Hal, adding, “You have to be so careful that in your need for a thought partner, you don’t over-burden a teacher, or a secretary, or share inappropriate information with them- that’s trouble.”

Iris had mentioned that after three very lonely years, she was finally able to hire an assistant director:

All of a sudden, I realized how truly lonely I had been, and how much I had been keeping so many things bottled up inside. I had someone to bounce ideas off of, to sort of vent to, and it was a relief.

John’s school went into state-mandated turnaround for consistently low end-of-year test scores. It was a process that he had dreaded and tried extremely hard to avoid, thinking it would be a terrible burden. He ended up surprised. He said:

So, the state sends in a “mentor”, and all our work is going to be scrutinized, and everything will depend on this stressful process. But no! I mean he’s there to evaluate, sure, but they want the school to succeed. I then, I am working with him a few times a week, and I start thinking, man! This is what it’s like to have a partner, a friend, and I realized what a lonely existence I’d had for six years.

“You are it,” agreed Frank, saying:

I told my wife I am the school’s liver. All of the negative runs through you: so angry parents run through you, if a teacher screws up, right? Or discipline at the school, child protective services actions, which are just heartbreaking, and the reason I didn’t stay in child psychology – because people aren’t kind to kids, sometimes. I filter it out and protect students and teachers and staff from it. That is lonely and isolating and unhealthy.

**Burnout.** All participants claimed periods of time during which they experienced what could be burnout, which is the next subtheme discovered within the mental health major theme. participants described periods of despair and disillusionment, resentment toward teachers, legislators, parents, and in some cases, children. Evan mentioned, “I did not manage the day-to-day stress of being a charter school leader, because it was not possible. I don’t have a mechanism to not carry stress home with me. As a principal it is pretty constant and consistent.”

Evan was not the only one to feel this way. Grace admitted:

I said to my instructional coach – let’s give up. It’s too hard. I am an educator, and I am afraid of students. I don’t like being afraid of students, but I am, because I don’t have the supports and structures in place for when you throw a chair, or for you to run screaming around a classroom every day, with a new teacher in the room.

Frank noted:

There *is* a lot of good- I try to remember that. But I'm not going to make it. I am not going to make it to retirement in this job. That's why I'm in the doctorate. So I can finish my pension years at the University – so I can bail. The stress from this job will not let me be here for 12 years. There ain't no way. I think about new jobs all the time.

Colby compared his work to pushing 20 heavy boxes up a wide, long, and endless incline. “You can only push one or two boxes up at a time, and while you do that, the other boxes are sliding back down.” The work never ends, according to this analogy, and the boxes do not really change, year to year. It can be stressful in that one has to come to terms with the fact that there is no end. Participants know that school improvement is not something that you finish, but a constant effort toward improvement, guided by constant assessment of current needs. It can feel like there is no reward for challenging work.

Donna commented, “you are giving all of yourself, and you're not getting enough back. The system is broken- burnout is inevitable if your work can't be rewarding.” She recalled listening to a conference speech by Michelle Navarre the recipient of the 2017 Silverberg Leadership Award at the EL Education National Conference in Chicago. Donna paraphrased something she remembered which greatly resonated with her, recounting:

She said ‘Every day, I sit in my car, in the school parking lot and say to myself, over and over, ‘I love my job, I belong here. I love my job, I belong here- until I convince myself to go inside’. In the audience, it was dark, and I cried.

Due to feelings of burnout, Grace admitted:

I have developed strong aversions that I have to overcome. To my phone, to emails, to coming to school. Dealing with people. How many times do I have to tell this teacher

that the button with the red man walking is the alarm's on button? I see a teacher or a parent coming at me and I think 'Good gravy. What fresh hell is this?'

Evan described tensing up at every phone call, or as a teacher or student or a parent approached him. It surprised him how much he had come to "hate people": "Instead of seeing people as people, they were potential problems, potential threats, to me, to my peace of mind." That feeling, which he reports is not his nature, caused him to take the instructional coach job, at 40% less salary.

Participants described feeling guilty that they had begun to resent the people they had set out in their careers to help. They recall instances of trying to delegate more to help manage burnout, which also led in some cases to further guilt. Several participants described pulling back during times of burnout, which left some responsibilities unmet, and pushed tasks onto other people. The unmade calls and unwritten emails cause more stress and resentment, again enfolded in guilt. Grace said, "My assistant has been up until two o'clock in the morning to do things, because I can't. I can't. I feel guilty. That is going to burn those people out."

Other participants shared similar experiences. Hal said:

I asked a lead teacher to step into a Dean of Students role, to help me with behavior.

After two-months she left that role, and then that year she retired, without any former plans to. She said "I can't do it. I can't deal with these kids, with their families" - so it's back on me and on classroom teachers.

Bauer and Annenson (2010) reported that isolation in school leaders is a strong predictor of physical and emotional burnout. This was particularly the case for leaders who had moved from the classroom into administration (Nichols & McBride, 2017). As they struggled with

burnout, they described beginning to lose a sense of themselves, and struggling with self-worth and self-efficacy. Grace said,

As a teacher, I was a rock-star. I gave that up. Now, I deal every day with feeling ‘I suck. I suck. I suck’. That’s my last thought at night. And, since I am always working to get better and to try new things, there are always new things to be sucky at.

This echoes themes in the research literature, in that the effects of loneliness and burnout can incite depression, and decreased self-efficacy, confidence and self-image (Rokach, 2012).

### **Research Question Responses: RQ1**

The first research question of the study was designed to discover what aspects of their employment, if any, charter leaders in the western United States perceived as causing stress and burnout. This research question was answered by the major theme of conflict with local school boards, identified by participants as a significant source of stress. This was true for all the participants, regardless of their background. Those who came to charter leadership from traditional public schools, and those with no background in education both cited interactions with local school boards as highly stressful. Frank said:

When I was hired, I was dealing with a board chair who basically wanted to run the school- she had no education background, no experience, and she acted like she was the one in charge. That led to tensions with me, and with teachers- it was confusing for teachers, and stressful.

In some cases, these interactions were more stressful for participants who had backgrounds in education, because the levels of stress and tension were reportedly surprising when compared to district-based interactions with superintendents and district-level school boards.

Further answering the first research question was the second major theme, concerns with maintaining enrollment. This was a reported stressor for all participants. As Grace admitted, “Open enrollment is a constant stress.” Enrollment determines the level of state funding, and as reflected in the sub-theme of funding concerns, local school boards push for full enrollment to ensure the school remains financially viable. As students leave throughout the year, charter school leaders reported pressure to replace students to maintain enrollment and funding. Frank expressed a sense of helplessness concerning maintaining student enrollment, saying “So many aspects of enrollment are beyond my control, but ultimately I am held responsible, and not just for my job, but the jobs of everyone who works here.” All participants felt the financial pressures of trying to maintain full enrollment. Colby said, “Every student I lost during the last school year was \$5000 I didn’t have to meet my budget. One unhappy family, and suddenly I am down \$20,000 for the year, if I can’t replace them.”

Further addressing research question one, participants discussed the third major theme, student behaviors. According to participants, students with behavior issues often come to charter schools as a last resort. Beth’s school had such an influx of students needing behavior interventions that they installed a padded room at great expense. She said: “We don’t have the capacity to provide an appropriate education to such a broad range of kids with high needs.” Despite a great personal desire to help children with special education or behavior intervention needs, Ann claimed this was a major source of burnout for her. She said,

We try to do everything we can for those kids. Everything! I want them to succeed. Then there is push back from classroom teachers, and from aides. From parents. I was sued twice because of special education. Twice! Damn right that burned me out!



Participants reported that often, students who accept seats mid-year find it difficult to adjust to the existing culture in the school. Also, students who accept spots mid-year are often not finding success at their current school, and often come with either academic or behavior issues that are difficult to deal with. The participants reported this phenomenon as stressful, with data consistent with the sub-theme of difficult students being drawn to charter schools.

The fourth major theme of job scope also answered the first research question. Participants felt that the range of duties, responsibilities and necessary skill sets made the job of charter school leader stressful. Ann said, “The charter school director is really the CEO, the principal, the CFO, the school nurse, the school psychologist, HR – you know, you’re everything rolled up into one, and you’re expected to keep your cool the entire time.” Colby remembered dealing with contractors, carpenters and plumbers to donate time to the school, and he had to learn about fire suppression systems, working with electricians, concrete contractors, painters and carpenters.

He said:

I am doing all this, with no background in any of it. I am suddenly a facilities manager, who also has to write curriculum, be an HR manager to hire and train teachers, recruit students- it was four full-time jobs.

Additionally, insights concerning research question one were gleaned from a subtheme under the major theme of job scope, interpersonal relationships. Participants expressed that dealing with a large number of different constituencies with different needs made the range of types of personal interactions a major stressor. Interpersonal relationships with students, with teachers, with parents, with board members and community members all require the school leader to fulfill different roles, use a different set of social norms, and communicate in different

ways. Participants also felt called upon to mediate the relationships between stakeholders. The scope and variety within interactions is vast, and the barrage of interpersonal conflicts is pervasive. Frank said:

People want me to fix their relationships, and they don't have the willingness to make necessary changes, on their own. This could be student-teacher, teacher-teacher, teacher-parent, even student-parent. I have had divorced parents in my office who want me to help them navigate joint custody. That, to me, is super frustrating.

Finally, the subtheme of executive loneliness, under the sixth major theme of mental health, further answered the first research question. Donna reported:

It is extremely isolating and lonely. That's very high on the stress factor list. You can be highly disliked, or not appreciated. When you are doing extremely difficult things, and there are no thanks, that can be very hard to live with. A lot of the work you do can't be shared, and there are very few people who can understand what you're going through as a school leader. It is very isolating. It is *very* isolating. There is not a single person in the building right now that I can share all the elements of my job with. You are the only director in the school. There is no time to connect with peers – just to commiserate with and cheer each other up, there are no mechanisms for that.

### **Research Question Responses: RQ2**

The second research question for the study focused on charter school leader perceptions of the ways job-related stress and burnout impacted their professional lives. This research question was answered by the sixth major theme that centered around the mental health of the participants. Participants all described times of burnout affecting their work. Maslach and Jackson (1981) identified the professionals most susceptible to burnout are those whose jobs

require close interaction with other people. Donna felt that sitting in her car in the morning, struggling to convince herself to go inside the school building was a common experience for charter leaders. As stress wears down emotional and physical resources, burnout manifests as physical exhaustion, depersonalization and detachment, and low self-efficacy (Maslach & Jackson, 1981). Sub-themes concerning physical health and mental health were also significant in addressing the second research question. Common threads from these sub-themes pertaining to the research question about the effects of stress on professional lives indicated a degradation of participants' capacity to effectively meet the demands of their profession. While experiencing the dehumanization component of burnout, Grace grappled with an aversion to phone calls, emails, and entering the school building without being paranoid and guarded.

This dehumanization component of burnout, within the major theme of mental health concerns, was described by participants whose levels of empathy and motivation to help became to feel diminished. This corroborates what extant literature reported. Maslach (1998) reported that burnout degrades both the motivation and capacity to serve the people one is meant to help. As Evan mentioned, when experiencing burnout, he began to feel a lot of resentment toward people, which he felt was very much out of character for him. Frank admitted that when he is experiencing burnout, his patience with parents fails. He said:

I would say that I got into education to help kids, and I don't see me ever blaming kids, but I sure as hell blame parents. You want to assume that parents, at least most parents, try to do what's best for their kids. But parents drive me nuts. If I didn't have to deal with parents, I would love my job.

Considering the effects of burnout, Colby began talking about some resentment in dealing with new faculty or with parents who helpfully try to raise 'new' concepts or ideas. He

found himself cutting them short, with the attitude he described as “we’ve tried that, it doesn’t work, and who are you to suggest this?” He was aware of the nature of these interactions after the fact and regretted them, but still finds them happening occasionally during episodes of burnout. He continued:

Sometimes, I am short with people, teachers, parents. Sometimes that is a little productive, in that I say – this discussion is not moving anything forward. But...I am not a bossy boss, but in general if I realize I am reacting in ways where the effects of stress aren’t good, I don’t like that feeling, I have to get some space from it, I have to back away. Sometimes, it’s just “I can’t talk about this right now- can we do this tomorrow?”

### **Research Question Responses: RQ3**

The third research question for this study was used to discover how charter school leaders in the western United States perceive that job-related stress and burnout impacted their personal lives and relationships. This research questions was most fully answered by major themes five and six, physical and mental health. The effects of burnout as described by the research and corroborated by participants included physical and emotional depletion, low job-satisfaction, and decreased self-efficacy. Based on the findings of the present study, these three characterizations of burnout impacted participants personal lives, physically and mentally.

Significant concerns with participants’ personal lives centered upon the detrimental health effects resulting from burnout related to the work of being a charter school leader. It is apparent in the existing research that many physical ailments as described in this sub-theme are directly caused by, or exacerbated by, stress. These include asthma, ulcers, hyper-tension, significant weight gain or weight loss, migraines, back pain, digestive problems, immunity problems, arthritis, diabetes, cancer, strokes, and heart attacks (Quick et al., 2001). As a group,

participants described various struggles with nearly this entire list of complaints. Donna described intense periods of burnout, which for her manifested as complete physical exhaustion (Maslach, 1998) said:

So, for the past several years, I have ended up in the hospital by the end of the school year, because I got incredibly, physically sick, with, like, a real thing, and I thought *this is ridiculous - it is coinciding with the school year*. I will, I have realized, work through anything until I cannot, and that is super unhealthy. I went home and decided to go to the hospital for the night, and the next morning I came back. I never told anyone about this, I could barely stand up. They are looking to you to be the strength and stability that they look to. You the pillar of strength, I do feel like that.

Grace mentioned her doctor's concerns that the effects of stress and burnout were hindering her body's response to tumors. Four participants wore heart monitors at some point during episodes of burnout.

In terms of the effects of burnout on mental health, concerns centered on personal relationships. Participants related episodes of burnout, which they described as feeling drained, mentally or emotionally absent during interactions with spouses and children. They described having few emotional or physical resources after the workday. Evan said that while experiencing burnout, he struggles at home with feeling of reduced performance in his home life roles:

I have finite resources and the school day just drains them. Then there's the guilt – I am not being the dad I should be, the husband I should be. I beat myself up over it. But it stays the same.

Frank reported when is burnt out, he too is often vacant, absent from conversations with his wife or children. Grace has a rule that she does not work from home, but said, “Yeah, that’s great: I don’t do work at home – good rule. But I can’t stop thinking about it – that kid, that teacher, that state report. I am never not thinking about it.” This leaves her feeling she is never fully present. Burnout causes her to feel she is deficient in her competency as a mom and wife.

The physical exhaustion related to burnout was also a challenge when considering physical and mental health in terms of the motivation to exercise or employ other stress coping strategies. Evan said,

I come home and despite all intentions, I sit on the couch and watch TV. I say to myself I am going to relax for 15 minutes, but more often than not, I do not have the willpower to get up and move.

Ann, whose daughters attend her school as students, recounted occasions when she was experiencing burnout, and how it affects her family. She described times she was standing at the stove, or washing dishes, unhealthily fixated on work stress, and her oldest daughter calls her out:

She calls me the work zombie. ‘Mom, you’re a zombie again!’. She’s sick of it. We all are. Of course, they go to my school and we’re there ‘til six o’clock. They’re stuck there while I finish work, and then we finally get home, and they still have to put up with my work zombie. I hate it.

Work Zombie seems a particularly apt phrase to describe the three core components of burnout: physical and emotional exhaustion, depersonalization, and reduced personal accomplishment (Maslach, 1998).

#### **Research Question Responses: RQ4**

The final research question for this study was focused on charter leader descriptions of their strategies for dealing with stress to avoid burnout. The fifth and sixth major themes revealed during data analysis, the physical and mental health concerns surrounding job-related stress, helped to answer this fourth research question. All participants had ideas about how they try to manage stress, such as mindfulness, exercise (running, swimming, biking, yoga, skiing), spending time in nature, and leaving work at work. They also, however, in other statements, lamented not having time or making time for exercise, for example, and not being able to leave work at work.

Gmelch (1983) classified stress management strategies into three categories: physical activity, mental control and management skills. All the strategies identified by participants fell within one of these categories. In the physical activity category, participants named walking, hiking, running, yoga, CrossFit, playing a musical instrument, boxing and rowing. Under the mental control category, participants listed intentional optimism, discussing problems with a spouse or colleague, self-questioning, meditation or mindfulness, and keeping a gratitude journal. Under management skills, participants mentioned building their capacities in time management, team management, conflict management and the effective delegation of tasks.

For the fourth research question, the focus group interview was more fruitful than individual interviews. For example, during the individual interviews, participants thought of one or two strategies they might use to alleviate stress. However, during the focus group interview, when one participant mentioned a strategy, others recognized that they have tried or use the same strategy. Donna, for instance, in her individual interview mentioned running, yoga and mindfulness. In the focus group, when Hal said he likes to get outside and take a hike to clear his

head, Donna said “Oh! Me too!”, as did the two others. When Hal mentioned guitar playing, Grace remembered her ukulele. Self-questioning was something utilized by half of the participants, which was manifested in them approaching an issue with logic, trying to avoid over-emotional responses. It was described as a kind of mindfulness practice. Some questions offered by participants were: Is this (what I think) true? If it is true, so what? Now what?

Colby has been a charter leader for longer than any other participant. I pointed this out to him and asked if he could explain his longevity. He laughed, and said:

It’s hard, by the way, the journey. We’ve done a lot of work. There’s a lot of work left to do. You are making me think about this. It really is hard. I know with [the two junior administrators he had recently been training] – they left. It was the stress. I don’t really know how I keep going. I don’t like that a lot of my day is ‘make sure the utility bills get paid, make sure the lawn gets cut’. That is not necessarily encouraging or motivational to me. I regret sometimes that I might always not directly help kids. I am removed. But if I feel I can still help teachers make opportunities for students and their families, then the work is still interesting to me. I can manage the stress if I see I am helping.

This attitude was echoed by several participants. If they see that they are making a difference for teachers and students and families, they can withstand the stressful nature of their work.

### **Summary**

Chapter Four included a presentation of the findings of this transcendental phenomenological study to understand the impact of stress and burnout on charter school leaders in the western United States. Data were collected from the 10 participants using individual interviews, a single focus group interview, and site observations. Data revealed four major themes and several subthemes related to stress and burnout. The major themes included: local



school boards, enrollment, student behaviors, physical health, mental health, and job scope. .

The findings of the study were presented in Chapter Four first according to the theme, then according to the research questions. Participant responses were woven into the descriptions, and the research question results were framed with relevant connections to the major themes and sub-themes of the study.

## **CHAPTER FIVE: CONCLUSION**

### **Overview**

The purpose of this transcendental phenomenological study was to understand the impact of stress and burnout on charter school leaders in the western United States. Chapter Five presents a summary of study findings. This chapter includes a review of the empirical and theoretical foundations evident in the literature. In addition, the implications of the study are presented, including theoretical, empirical, and practical connections to relevant stakeholders. The chapter also acknowledges the delimitations and limitations of the study, prior to presenting recommendations for future research. The chapter concludes with a summary of both the chapter and the study.

### **Summary of Findings**

Three forms of data collection, including individual interviews, a focus group interview, and site observations were used in this study. Together, these three data collections methods ensured strong triangulation for the findings of the study and provided an understanding of the job-related stress and burnout experienced and described by the charter school leaders who were the participants of the study. The targeted participants were screened using an online version of the Administrator Stress Index (Gmelch, 1982) to indicate whether they had experienced job-related in their work as charter school leaders. I recorded the individual interviews and the focus group interview and transcribed the recordings. I collected descriptive and reflective field notes from the site observations, completed the transcriptions, and analyzed the data

The primary source of data were the individual interviews. Participants openly and honestly described their lived experiences with job-related stress and burnout in their work as charter school leaders. The focus group interview allowed participants to compare their own

experiences with job-related stress and burnout to others in the field of charter school leadership. Participants were able to interact and hear others describe their own experiences with job-related stress which helped them round out their own understanding of the stress and burnout inherent in the job. In addition, the focus group interview offered me a more complete picture of their lived experiences with the phenomenon of the study. The site observations served to demonstrate and validate the types of experiences described in the individual and focus group interviews. I was able to observe first-hand the participants dealings with many of the stressors and situations they had recounted during the individual and focus group interviews.

Analysis of the data collected revealed six major themes. These six major themes were the stress and burnout stemming from interactions with local school board, the stress and burnout resulting from the need to maintain student enrollment, the stress and burnout caused by student behavior, the broad job-scope of being a charter school leader, and the mental and physical health concerns resulting from the effects of job-related stress and burnout for charter school leaders. As these themes developed, they served to answer the four research questions at the heart of this study.

The first research question in the study asked: What aspects of their employment, if any, do charter leaders in the western United States perceive as causing stress and burnout? The intent of this question was to discover if charter school leaders found their work stressful, and if so, what facets of their work they thought caused the stress. Each of the first three major themes and their subthemes were pertinent in answering this primary research question. Each participant described dealing with school board members, worrying about student enrollment numbers which determined funding, and the vast job-scope requirements of their work as causing stress.

The second research question in the study sought to discover how charter school leaders in the western United States perceive that job-related stress and burnout impact their professional lives. Participants noted that when they are overly stressed, or experiencing burnout, it does affect their professional lives. Colby admitted being short with and dismissive of adults (parents and teachers) that he interacts with in the professional environment. Grace developed anxiety over interactions, including via email, cell phone, and in-person. Evan found himself resenting people as they approached him, people that he had begun his career to try and help. Donna identified with having to sit in her car in the parking lot until she convinced herself to go inside the school. Most agreed that the effects of stress and burnout involved in charter school leadership makes the job unsustainable. Of the 10 participants in this study, only three remained in their jobs as charter school leaders as the 2019-2020 school year opened.

The third research question posed in the study asked how charter school leaders in the western United States perceive that job-related stress and burnout impact their personal lives and relationships. Citing episodes of burnout, participants described feeling “removed” and “vacant” in their interactions with their friends and family. They described an overwhelming drain of both physical and emotional resources after the workday. This remoteness led to feelings of guilt stemming from perceived inadequacies in their personal and familial roles and responsibilities.

Additionally, the effects of stress related to the work as a charter school leader affect participants personal lives in terms of their health. Most participants claimed frequent sleep issues: difficulty fallings asleep, difficulties staying asleep, and insomnia. Some sleep issues where described as chronic. Most of the participants described self-medication with alcohol and drugs, both prescription and illegal. Four participants have had to wear heart monitors during the workday. The participants described the effects of burnout and the chronic inflammation from

long-term stress as deeply affecting their health. More than half the participants described poor eating habits, poor nutrition, and lack of exercise, all related to the effects of job-related stress and burnout.

The fourth research question framing the study was: How do charter leaders describe their strategies for dealing with stress to avoid burnout? Strategies to alleviate stress or the effects of stress fell within three categories: physical activity, mental control, and management skills. Participants all listed physical activities with which they try to help manage stress and burnout, such as walking, hiking, running, yoga, playing musical instruments and boxing. In the mental control category, participants mentioned approaching the day with intentional optimism, discussing issues with a thought-partner (such as a colleague or spouse), self-questioning (Is what I think true? If so, so what? Now what?), mindfulness or meditation, and keeping a gratitude journal. In terms of coping strategies in the management skills category, participants mentioned time management, conflict management, team management, and delegating effectively. Participants reported trying to make space in their lives for these strategies. At the same time, however, they regretted not being able to find time for exercise, and the difficulty of leaving work concerns at work. Colby felt that focusing on the outcomes for students and their families helped him stay engaged in the work, maintaining a career as a charter leader longer than any other participant and avoiding burnout.

### **Discussion**

The findings in this study strongly correspond with the empirical and theoretical research literature outlined in Chapter Two. The literature review described the existing empirical research in the areas of stress and school leadership, the effects of stress on health, and the effects of burnout. The literature also linked effective leadership to student outcomes. The

theoretical literature underpinning this study included the Gmelch (1982) stress cycle theory and Maslach (1998) multidimensional theory of burnout.

### **Empirical Literature**

Participants' experiences revealed in this study substantiated the empirical literature reviewed in Chapter Two. For example, the data collected for the present study corroborated the research concerning the stress inherent in the field of school leadership. According to Klocko and Wells (2015) the stress of the principalship has been well documented for more than 30 years. The present study also corroborated the health effects of stress. Ventura, Salanova and Llorens (2015), found that job-related stress is a primary health complaint reported by people in the workforce. Simmons and Nelson (2001) reported that strokes, cancers, ulcers, arthritis, diabetes, tension, migraines back pain and high-blood pressure are caused or aggravated by stress.

The gap in the literature that was the focus of the present study was multi-faceted. Existing literature documented the stressors and coping strategies of traditional public-school principals, such as Boyland (2011) who noted extant research focused almost entirely on traditional district-school principals. As such, scant research explored the distinctive challenges that cause stress and burnout for leaders of charter schools. Extant studies indicating that the responsibilities of a charter school leader can differ significantly from their traditional district school counterparts were corroborated, for example, by the fact that charter schools function without the district supports that traditional public schools routinely receive (Bickmore & Dowell, 2014). Frank said, "as a charter school principal you are also the superintendent of a tiny district, with your own board." Participants described having to devote significant time on myriad activities, ranging from mundane to vital. Corroborating Bickmore and Dowell (2014),

participants described the difficulty of leading a charter school as a school of choice, subject to the shifting whims of students and families, while trying to maintain funding tied to enrollment. For example, Colby said “as schools of choice, parents can choose to enroll their kids in our school, and just as easily choose to pull them out- it happens all the time.” This need to constantly struggle to meet parents’ changing needs and desires necessitates that participants consider decisions with an entrepreneurial and customer-serviced minded approach. As evidenced in the prior research, Blitz (2011) stated that charter school leaders consistently need to reassure and re-educate families about the innovative aspects of the school which led them to enroll originally.

As Sullins and Miron (2005) found, compromises may change innovative charter programs in order to adhere to state standards, which can cause disillusioned families to leave for other schools, making innovative schools of choice less viable. The current participants agreed these conditions led to decisions that are often in conflict with what are considered best practices, and in tension with the overall mission and vision of the school. That tension was described as a source of stress and burnout.

Participants’ descriptions of the effects of job-related stress and burnout on their health also corroborated the existing empirical research, including Holmes (2016) who discussed stress as causing unhealthy behaviors, which exacerbate the already significant consequences of stress, decreasing a leader’s capability to interact with thoughtfulness, empathy, rationality, and compassion. These behaviors included poor sleeping habits, lack of exercise, and increased alcohol consumption (Holmes, 2016). Participants in the present study described struggling with these very concerns and their consequences. Five participants reported increased alcohol consumption. Donna claimed that most of the school leaders she knows are “high-functioning

alcoholics.” Echoing the extant burnout research, participants in the present study also complained of depression, physical and mental health issues, feelings of ineffectiveness, decreasing self-efficacy, lower confidence, and poor self-image (Bandura, 1977; Maslach, 1998). This was true of Grace, who said of her capacity to do her job: “I don’t know how to do this. I have no training for this. I have no emotional resources to do this.” As evidenced by Donna’s periods of nightly hospitalization for exhaustion, extended periods of work-related stress led to poor health, physically and mentally, including burnout, which confirms previous research (Maslach & Jackson, 1981).

These effects of stress and burnout depleted participants’ physical and emotional resources, and eight explicitly admitted to instances of burnout, wherein their own needs had to take precedence over the needs of teachers and students. The effects of burnout as described by the research and corroborated by participants included physical and emotional depletion, low job-satisfaction, and decreased self-efficacy. (Maslach & Jackson, 1981). All participants described experiences corroborating this definition throughout their careers as charter school leaders. They also recounted symptoms consistent with the burnout literature, including physical and emotional exhaustion, and resentment toward faculty, parents, and students (Maslach, 1998). Evan ended the workday exhausted physically and emotionally. Frank cited feeling absent from interactions with his wife and children, preoccupied with work concerns and depleted emotionally.

### **Theoretical Literature**

The existing theories supporting the present study included the managerial stress cycle theory (Gmelch, 1983), and the multidimensional theory of burnout (Maslach, 1998). The six major themes that emerged from the present study relate to these foundational theories. The



major themes identified in the study included local school boards, enrollment, student behaviors, physical health, mental health, and job scope. Participants corroborated the managerial stress cycle theory (Gmelch, 1982), describing role-ambiguity as a major stressor for school administrators, for instance Frank saying that dealing with a board chair overstepping her role “led to tensions with me, and with teachers- it was confusing for teachers, and stressful.” Internal role ambiguity for a leader is defined as conflict arising from incompatible internal beliefs, attitudes, and interactions, coupled with a lack of autonomy (Gmelch & Torelli, 1994). Participants, aligned with extant research, also described experiences of role-ambiguity also within interactions with their school’s governing board, as evidence when Colby shared that “Without a doubt, the biggest source of stress...is our board.” Role conflict for school leaders is described in the theoretical literature as a leader being required to act in ways that are in contradiction to his/her core values or being required to meet the needs of contradicting demands (Gmelch & Torelli, 1994). Donna shared that one of the most stressful aspects of her job “was being asked to do what I considered unmoral and unethical” while navigating relationships with the board and the management company owned by a board member’s relative. The tension of meeting the mission and vision of the school while also complying with state and federal mandates, while also meeting the needs of multiple constituencies was named as a stressor by participants. All participants described role conflict and tensions between different constituencies as a major stressor. Stress derived from interpersonal relationships as described by participants is directly correlated with the extant burnout literature, such as Maslach (1998) who found that intense personal interactions with other people over time can lead to burnout. As Beth said,

I have been here at this school, doing this for six years, and still at every board meeting, I am ambushed, I am blindsided by something or someone. I continuously wonder whether or not this will be the board meeting when they fire me.

Gmelch (1981) depicted stress as a relational transaction between an individual and the environment, where conflict triggers the stress response when resources are perceived to be insufficient to meet the environmental demands. Gmelch's description was corroborated by the participants' descriptions of what causes stress and burnout in their work. The second major theme of the present study was the stress derived from the need to maintain the student enrollment that determines the charter school's funding. As described in the extant literature from Sun and Ni (2016), participants depicted the stress of maintaining student enrollment in an era of higher school accountability, in a school model that is subject to market forces similar to those that dictate commercial success for a business, with charter school leaders having to gauge and influence consumer satisfaction and public demand.

Constant job-related stress was cited as detrimental to health, well-being, and personal and professional lives by all participants. Frank said, "A lot of nights, maybe most nights, I wake up in the middle of the night, and I do not go back to sleep." Grace's doctor warned her to "consider that stress is hindering your body's response to the tumors and your overall health." Prolonged stress can, according to the corroborated extant literature, lead to decreased self-efficacy (Bandura, 1977). Self-efficacy, as described by Bandura (1989), refers to an individual's beliefs concerning their ability to influence events that affect their environment. Bandura (1977) and Gmelch (1994) pointed out in the extant theoretical literature, lower self-efficacy fosters lower expectations, less effort, and less successful outcomes, all of which lead to yet lower self-efficacy, in a stress inducing cycle that can lead to burnout. Each of the

participants in the present study described periods of despondent burnout and feelings of low self-efficacy, which had negative effects on all facets of their personal and professional lives, therefore corroborating the findings of Bandura (1977) and Gmelch (1994)..

### **Implications**

The stressful nature of school leadership in general has been the subject of frequent study and well documented over the past five decades (Klocko & Wells, 2015). Studies have concluded that most school leaders experience significant stress and severe stress-related symptoms (Ginsberg & Multon, 2011). School leaders were convinced that job-related stress negatively impacted their physical and mental health and their productivity at work. The data collected in the present study corroborated these findings, resulting in numerous implications. The theoretical, empirical, and practical implications for this study are addressed in the following sections.

#### **Theoretical Implications**

Participants corroborated the extant literature focused on the stress of traditional public, district school leaders, including the literature examining stress grounded in the Gmelch (1982) stress cycle theory and the Maslach (1998) multidimensional theory of burnout. The present study corroborated extant research, finding that because of job-related stress, charter school leaders may have the increased tendency to form health-impairing behaviors, such as poor sleeping habits, lack of exercise, and increased alcohol consumption (Holmes, 2016; Maslach, 2001). These behaviors aggravate the already substantial effects of stress, and lead to burnout, and a decrease in a leader's capacity to act with kindness, logic, and empathy (Holmes, 2016).

Existing literature focused on the stress of traditional public, district school leaders (Boyland, 2011; Coelli & Green, 2012). My research showed that the high level of stress in

school leadership is also evident in the experiences of charter school leaders. Participants' described experiences with job-related stress mirrored many of those described in past studies focused on traditional school principals in district schools, yet many new and different challenges and stressors surfaced in this study that are specific to the parallel field of charter school leadership. Acknowledging and examining these novel demands is essential to helping charter school leaders address the effects of job-related stress and burnout, which, in turn, can make charter school leaders more effective, resulting in improved student outcomes.

Regarding the negative effects of stress and burnout, nine of 10 interviewees described frequent sleep issues, the effects of which hurt job performance, and affected both personal and professional relationships. Seven reported having insufficient time or energy for regular exercise. Six participants described taking prescription medications for anxiety, depression, or sleeplessness. Five reported drinking alcohol as self-medication. Donna said, "I am on a chat group with other principals in the state. We all say that we are seriously high-functioning alcoholics." Participants experiencing burnout reported feeling drained, feeling mentally or emotionally distant in personal relationships. They described feeling exhausted emotionally and physically after the workday. Evan said:

I come home and despite all intentions, I sit on the couch and watch TV. I say to myself I am going to relax for 15 minutes, but more often than not, I do not have the willpower to get up and move.

Similar to traditional school principals, the charter school leaders who were participants in this study experience elevated levels of job-related stress and suffer the effects of that stress in many ways (Bickmore & Dowell, 2014; Blitz, 2011; Ndoeye, 2010). As Sogunro (2012) reported

from a study with hundreds of traditional school principals, nearly all claimed stress and burnout as severely affecting their health, physical and mental, and their job performance.

Charter school leaders who participated in the present study all professed the effects of stress and burnout related to their jobs had negative impact on their health, job-performance, and personal and professional relationships. Therefore, the theoretical implications of this study suggest that future research could identify successful ways charter school leaders might better cope with and alleviate the effects of job-related. Educational leadership programs in universities should include training for future administrators in coping strategies and stress management. Charter schools should form leadership cohorts that allow charter school leaders opportunities and time to meet with other leaders, for brainstorming on issues, sharing successes and challenges, to learn with and from each other, and for camaraderie and support.

### **Empirical Implications**

Consistent with extant research presented in Chapter Two, 10 participants described experiences concerning the stressful nature of their jobs, and the effects this stress had on their health, both mental and physical, on their job-performance, and on their professional and personal lives (Gmelch, 1983; Maslach 1998; Maslach, 2001). Maintaining student enrollment and the funding tied to it was universally named by all participants as a significant cause of job-related stress. All participants serve in schools where employment agreements prominently state that all salaries and benefits tie to funding, which comes from maintaining enrollment, which is stressful for leaders, teachers, and support staff. Since funding comes through student enrollment numbers, recruiting new students and keeping current students becomes a significant part of a charter school leader's day. And in fulfilling multiple roles to keep many diverse groups of stakeholders satisfied. The stress described by all participants led in most cases to periods of

decreased job-performance, a stated corroborating the extant burnout literature (Maslach, 1998) and the managerial stress cycle theory (Gmelch, 1983).

Each participant mentioned challenges in dealing with local school boards. Role ambiguity in the relationships between school directors and governing board members was stressful for seven out of 10 participants, corroborating extant literature (Gmelch & Torelli, 1994). Evidenced in the first major theme of this study, conflict with local board members proved to be a significant stressor. For instance, as Frank mentioned, he came to the position of charter school leader with a board chair who “acted like she was the one in charge. That led to tensions with me, and with teachers- it was confusing for teachers, and stressful.” Board members often make decisions or take actions that, as Hal noted, end up “far overstepping the authority of a board, and the precepts of professionalism and common decency.”

Board meetings as described by participants were combative, tense, inefficient, quarrelsome, trying, stressful, and too long, with eight participants citing board meetings that routinely last more than six hours. Participants described many board members who were naïve, uninformed, and unrealistic, as well as loud, irrational, and abusive. Those participants who had prior experience in dealing with other institutional boards believed that charter school board members were ill-prepared for meetings. Other types of boards were described as efficient, with most of the necessary communication and information managed outside the board room, leaving only the formal vote to occur in very a short meeting. Charter school board members were reported to discuss a topic over and over, often in combative and contentious ways.

Therefore, based on the empirical implications of this study, I recommend that prospective charter school board members have a training program. They might intern on the board, acting as non-voting members for a set period. State requirements should include

mandatory training in formal classroom settings, or structured, quality online courses that provide them with the basic knowledge necessary to effectively perform their duties, to both oversee and support school administration and teachers.

### **Practical Implications**

The findings of this study imply that the levels and varieties of stress experienced by charter school leaders make the job difficult to the point of unsustainability. As noted, only 30% of the participants of this study currently remain in their roles as charter school leaders. Hiring new principals is difficult. The overall shortage of educators nationwide includes a growing shortage of qualified and effective school leaders. Whereas school leadership is the second most significant factor to student success behind classroom instruction, this is a grave concern in terms of student achievement (Leithwood et al., 2008).

As the number of charter schools grows nationwide, so does the number of children who depend on these new charter schools to provide a successful and useful education. Understanding the nature of job-related stress as experienced by charter school leaders and helping to mitigate both the causes and the effects of that stress can improve the outcomes for the growing population of charter school students. The insights shared by the participants in the current study can inform the development of curricula in educational leadership programs that will better prepare future school leaders for the unique stressors presented by the nature of charter school management. Likewise, insights from these participants could help create board member training programs that will help local school boards and charter school leaders work more harmoniously together to further the mission and vision of charter schools, and the success of their students.

New research on mitigating charter leader stress can support practical measures to reduce turnover in charter school leadership. Ni, Sun, and Rorrer (2015) concluded that charter schools experience higher rates of school leader turnover than traditional district schools. Additionally, the authors found that

When charter principals left, they tended to move to nonprincipal positions or leave the Utah public school system altogether, instead of moving to another school as principals. In contrast, when traditional school principals left, they tended to continue to be principals in another school, mostly within the same school district. (Ni, Sun, & Rorrer 2015, p. 410)

As seasoned charter school leaders leave their positions for jobs outside of education, charter schools as a group are losing valuable professional knowledge and experience.

Additionally, Miller (2013) reported that in years when schools are served by new principals, graduation rates decline. Frequent charter school leader turnover can degrade student achievement. Ni et al. (2015) found that:

Besides the high costs of recruiting and developing new principals, excessive principal turnover is often associated with a loss of school institutional memory and inconsistencies in school goals, policy, and culture. It often leads to decreased teacher commitment, increased teacher turnover, and potential disruptions in a faculty's collective efficacy. (p. 411)

If stress and burnout among charter school leaders can be allayed, school leader turnover can be reduced, and positive student outcomes can be better supported. Therefore, based on the practical implications of this study, I recommend that funding should be increased in order to allow the hiring of assistant administrator for charter schools. This would allow for the



delegation of tasks, easing the burden of a charter school leader responsible for all aspects of school administration. It would also alleviate the sense of executive isolation, giving charter school leaders someone to brainstorm with and vent to. This would also allow for the training of new charter school leaders, as junior administrator can be mentored by and learn from seasoned leaders. These actions could stem the exit of charter school leaders to other industries.

### **Delimitations and Limitations**

This study was subject to some deliberate delimitations and some unavoidable limitations. The design selected was a transcendental phenomenological study. I thought this the best design to explore stress and burnout through the perceptions of charter school leaders in the western United States. Phenomenology seeks to understand a phenomenon as experienced by individuals, considering their experience in its entirety (Moustakas, 1994). Using this design provided a rich and detailed description of the experience of the participants. Interviewing 10 participants individually offered multiple perspectives on the job-related stress experienced by charter school leaders. The focus group interview allowed participants to react to each other's experiences, and to describe their own experiences more fully in response. Site observations allowed me to note first-hand many of the stressors described by participants.

As a delimitation, the phenomenological approach did not afford me the opportunity to compare the experiences of charter school leaders and those of leaders at traditional district schools. One delimitation of this study was to include 10 participants, which for a study of this type is appropriate (Moustakas, 1994). One participant withdrew consent just moments before his individual interview, leaving ten active participants. Another delimitation of this qualitative study was the self-reported nature of the data. Self-reported experiences may include false

remembrances, exaggerations, or other unintentional biases, yet still allow for a rich description of the experiences of participants.

A limitation of the study was the geographical range, which included Utah, Idaho, Arizona, and Colorado, with seven participants working in Utah. A more dispersed and varied range of participants would offer more and differing perceptions. Only four or 40% of participants were able to attend the focus group interview, which further limited the scope of the study. A further limitation in the study resulted from contacting only participants who are currently the leaders of charter schools, or who were charter school leaders recently. According to Ni et al. (2015), statistical and anecdotal evidence suggests there are many former charter school leaders who leave the field of education and exploring their experiences with job related stress could be valuable.

### **Recommendations for Future Research**

The experience of stress in the field of charter school leadership is a growing concern and warrants additional study. According to a 2019 report from McFarland, Hussar, Zhang, Wang, Wang, and Hein, for the National Center for Educational Statistics (NCES), the number of students attending charter schools increased from 1% to 6% of all public-school students. As charter schools serve an increasing number of students, it becomes increasingly important to understand the stress involved in charter school leadership. Such research may help charter school leaders manage stress and avoid burnout and could therefore help improve student outcomes.

Further qualitative research in other regions of the country and considering the views and experiences of a greater number of charter school leaders would be beneficial. Charter school regulations vary from region to region, so charter school leaders in other parts of the country

might be able to provide different insights in other qualitative studies. This study focused only on public charter schools, non-profit entities subject to many of the same laws as local district schools, especially in terms of open enrollment, the use of state and federal funding, and special education laws. There are also for-profit charter schools, which operate as large networks, and leaders in those schools may have different experiences with job-related stress.

I believe additional qualitative phenomenological studies would also be beneficial in looking at the experiences of job-related stress for charter school leaders with and without prior experience in education. Quantitative studies comparing job-related stress for charter school leaders with and without administrative licensure would also be informative. Further phenomenological studies could also focus on charter school leaders who come to the position without former experience in education. Likewise, further qualitative studies could research the stress of charter school leaders who do not have professional certification in school administration. The amount of experience and formal training in education charter school directors possess before taking on the role could be examined in new quantitative studies to determine how stressful the job seems, and the severity of the effects of stress proved to be.

Further research focused on many of the themes and subthemes identified in the current study would also prove beneficial. The causes of job-related stress for charter school leaders are complex combinations of the myriad individual stressors identified in this study. Qualitatively researching individual aspects of the job-related stress, or singular causes of that stress could help tackle stress for charter school leaders in extremely specific and helpful ways. For example, the subtheme of executive isolation under the major theme of mental health could be studied with the aim of helping charter leaders address that individual cause of stress. As Bauer and Brazer (2013) note, “there is little explicit theory dealing with how isolation influences the

quality of school leaders' work lives, and work that has been done tends to treat isolation as an outcome” (p. 154). Bauer and Annenson (2010) found that the experience of isolation in school leaders is a solid predictor of burnout, particularly physical and emotional burnout. As participant Colby said, “That was very, very tough...I think the isolation is a big deal; being isolated, you need to find somehow to make connections.”

Further qualitative research on the executive loneliness described in the current study could help identify the causes of loneliness and seek remedies to the effects of loneliness. As Izgar, 2009 noted,

School principals face loneliness and depression and they are at risk. For this reason, it is very important for principals to be aware of these risks and possible results so that they can find the most suitable ways to cope with them and to be affected by the difficulties as slightly as possible. (p. 255)

Additional phenomenological studies could also further investigate the ways charter school leaders have successfully decreased the amount of job-related stress experienced. New qualitative research focused on coping strategies, the ways charter school leaders have addressed the effects of job-related stress, would likewise be beneficial. Helping charter school leaders identify ways to decrease the amount of job-related stress and to manage the effects of job-related stress would decrease burnout and turnover. Rangel (2018) asserted that analysis showed that of the schools that experienced a principal transition, 50% of them also experienced a decline in achievement in the first year of the new principal. Helping charter school leaders mitigate stress and the effects of stress to increase job sustainability increases student outcomes.

## Summary

While the stress involved in the principalship has been well documented throughout the history of public education in the United States, little or no research has focused on the stress experienced by charter school leaders. While the roles and responsibilities of charter school leaders often resemble the challenges faced by their counterparts in traditional public schools, the new model for charter schools present some distinct challenges for school leaders. Ten participants shared their lived experiences as charter school leaders for this transcendental phenomenological study.

Participants described many stressors they dealt with as charter school leaders in the western United States, all of which can be classified into four main themes. All participants described stress stemming from strained and conflicting relationships with local school board members. These relationships were a source of role-ambiguity, fueled by competing visions and objectives, and a lack of understanding the delineations of responsibilities and authority. This made board meetings a dreaded affair that caused significant stress or frustration for every participant.

Participants also described stress coming from charter school funding which tied to student enrollment numbers. Efforts to keep students and parents happy led to role-conflict, and in some cases, left teachers feeling unsupported and powerless. The need for marketing and branding left many participants stressed and frustrated with the many roles they had to fill at their schools. The scope of the job was a common thread throughout the interviews and contributed to the overall experience of stress. All these factors and the stress each contributed had derogatory effects on both personal and professional relationships, on job performance and job-satisfaction, and on participants' physical and mental health. Most participants felt the

stress inherent in their work and the effects of that stress made the job unsustainable in the long-term. Of 10 participants in this study, interviewed for six months from September 2018 through February 2019, seven have left the field of charter school leadership. I, too, left my position as a charter school leader in February 2020.

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## APPENDIX A

### Recruitment Email

Dear [Recipient]:

As a doctoral candidate in the School of Education at Liberty University, I am conducting research to complete my dissertation. The purpose of my research is to understand the experiences of stress and burnout in charter school leaders in the western United States. This study seeks to comprehend the aspects of charter school leadership that charter school leaders identify as causes of job-related stress or burnout. This study also seeks to understand the coping strategies charter school leaders have identified as helpful in dealing with the impact of stress or burnout. I am writing to invite you to participate in this study.

If you are now a charter school leader or have been a charter school leader in the past five years, and you are willing to participate, you will be asked to complete a brief survey. I will conduct individual interviews. Some participants will then participate in a focus group. Finally, observations will be conducted on-site for two to four hours. The interviews and focus group will each take 45 to 60 minutes. Your name and/or other identifying information will be requested as part of your participation, but the information will remain confidential.

A consent document will be provided at the time of the interview. The completion of the survey at the link below will indicate your willingness to participate in the study.

Sincerely,

Jamie McKay

## APPENDIX B

### Administrator Stress Index (Gmelch, 1982)

Administrator Stress Index (ASI)						
	Not Applicable	Never Bothers Me	Rarely Bothers Me	Occasionally Bothers Me		Frequently Bothers Me
1. Being interrupted frequently by telephone calls	N/A	1	2	3	4	5
2. Supervising and coordinating the tasks of many people	N/A	1	2	3	4	5
3. Feeling staff members don't understand my goals and expectations	N/A	1	2	3	4	5
4. Feeling that I am not fully qualified to handle my job	N/A	1	2	3	4	5
5. Knowing I can't get information I needed to carry out the job properly	N/A	1	2	3	4	5

6. Thinking that I will not be able to satisfy the conflicting demands of those who have authority over me	N/A	1	2	3	4	5
7. Trying to resolve differences between/among students	N/A	1	2	3	4	5
8. Feeling not enough is expected of me by my superiors	N/A	1	2	3	4	5
9. Having my work frequently interrupted by staff members who want to talk	N/A	1	2	3	4	5
10. Imposing excessively high expectations on myself	N/A	1	2	3	4	5
11. Feeling pressure for better job performance over and above what I think is reasonable	N/A	1	2	3	4	5

12. Writing memos, letters, and other communications	N/A	1	2	3	4	5
13. Trying to resolve differences with my superiors	N/A	1	2	3	4	5
14. Speaking in front of groups	N/A	1	2	3	4	5
15. Attempting to meet social expectations	N/A	1	2	3	4	5
16. Not knowing what my supervisor thinks of me, or how he/she evaluates my performance	N/A	1	2	3	4	5
17. Having to make decisions that affect the lives of -individual people that I know (colleagues, staff members, students, etc.)	N/A	1	2	3	4	5
18. Feeling I have to participate in school activities outside of the	N/A	1	2	3	4	5

normal working hours at the expense of my personal time						
19. Feeling that I have too much responsibility delegated to me by my superior	N/A	1	2	3	4	5
20. Trying to resolve parent/school conflicts	N/A	1	2	3	4	5
21. Preparing and allocating budget resources	N/A	1	2	3	4	5
22. Feeling that I have too little authority to carry out responsibilities assigned to me	N/A	1	2	3	4	5
23. Handling student discipline problem	N/A	1	2	3	4	5
24. Being involved in the collective bargaining process	N/A	1	2	3	4	5
25. Evaluating staff members' performance	N/A	1	2	3	4	5

26. Feeling that I have too heavy a workload, one that I cannot possibly finish during the normal work day	N/A	1	2	3	4	5
27. Complying with state, federal, and organizational rules and policies	N/A	1	2	3	4	5
28. Feeling that the progress on my job is not what it should or could be	N/A	1	2	3	4	5
29. Administering the negotiated contract (grievances, interpretation, etc.)	N/A	1	2	3	4	5
30. Being unclear on just what the scope and responsibilities of my job are	N/A	1	2	3	4	5
31. Feeling that meetings take up too much time	N/A	1	2	3	4	5



32. Trying to complete reports and other paper work on time	N/A	1	2	3	4	5
33. Trying to resolve differences between/among staff member-s	N/A	1	2	3	4	5
34. Trying to influence my immediate supervisor's actions and decisions that affect me	N/A	1	2	3	4	5
35. Trying to gain public approval and/or financial support for school programs	N/A	1	2	3	4	5

**APPENDIX C****Permission to Use the Administrator Stress Index**

**From:** Walter H Gmelch [<mailto:whgmelch@usfca.edu>]

**Sent:** Friday, December 22, 2017 8:34 PM

**To:** Jamie McKay <[JMcKay@promontoryschool.org](mailto:JMcKay@promontoryschool.org)>

**Subject:** RE: Request to use the Gmelch Administrator Stress Index (1982)

Dear Jamie:

You are hereby granted permission to use the ASI for your doctoral research. My only requests are that you cite the copyright in your survey and dissertation (Walter H. Gmelch @ University of San Francisco) and provide me with a summary of the results.

Best regards,

Walt

Walt Gmelch

Professor of Organization and Leadership

School of Education

University of San Francisco

(415) 422-5434

**APPENDIX D****IRB Approval****LIBERTY UNIVERSITY**  
INSTITUTIONAL REVIEW BOARD

June 26, 2018

Jamie McKay

IRB Approval 3267.062618: Job-Related Stress and Burnout in Charter School Leaders: A  
Transcendental Phenomenological Study

Dear Jamie McKay,

We are pleased to inform you that your study has been approved by the Liberty University  
IRB. This approval is extended to you for one year from the date provided above with your  
protocol number. If data collection proceeds past one year, or if you make changes in the  
methodology as it pertains to human subjects, you must submit an appropriate update form to  
the IRB. The forms for these cases were attached to your approval email.

Thank you for your cooperation with the IRB, and we wish you well with your research project.

Sincerely,

**G. Michele Baker, MA, CIP**

*Administrative Chair of Institutional Research*

**The Graduate School**

**LIBERTY**  
UNIVERSITY.  
*Liberty University | Training Champions for Christ since 1971*

## APPENDIX E

### Individual Interview Questions

#### Standardized Open-Ended Interview Questions

1. How did you decide to become an educator?
2. What was your professional experience before becoming a charter school leader?
3. How did you decide to become a charter school leader?
4. What do you believe to be the most rewarding aspects of being a charter school leader?
5. How would you describe the stress levels associated with your work as a charter school leader?
6. What do you believe to be the most stressful internal aspects of being a charter school leader?
7. What do you believe to be the most stressful external aspects of being a charter school leader?
8. How would you describe your experience of isolation in your job?
9. What aspects of charter school leadership did you find surprising when you first came to the profession?
10. How does stress stemming from your work as a charter school leader impact your personal life?
11. How does stress stemming from your work as a charter school leader impact your professional life?
12. How do you try to manage the day-to-day stress of being a charter school leader?
13. How successful do you feel you are in managing the stress associated with your work?

14. Describe any periods of prolonged stress that you struggled to manage effectively, that may be perceived as experiencing some degree of burnout.
15. How does burnout from your work as a charter school leader impact your personal life?
16. How does burnout from your work as a charter school leader impact your professional life?
17. Are there any other questions you feel I should have asked, or other issues you would like to discuss concerning job-related stress as a charter school leader.

## APPENDIX F

### Focus Group Interview Protocol

#### Focus Group Interview Protocol

1. Introduce myself
  - a. Welcome everyone
  - b. Thank them for participating
2. Provide a brief overview of the study and goals for the focus group
  - a. I am looking to understand their lived experiences with stress and burnout resulting from their work as charter school leaders
3. Provide information about the timeframe, breaks, bathroom locations, refreshments, etc.
4. Distribute name tags (first names only)
5. Discuss guidelines (discussion norms), written on an anchor chart
  - a. Participants can pass on a question or questions
  - b. Keep personal stories confidential
  - c. Avoid talking over each other
  - d. All opinions are respected and can be voiced
  - e. Any questions or suggestions for additional norms?
6. Let participants know this will be recorded and that transcripts will be provided

## **APPENDIX G**

### **Focus Group Interview Questions**

1. How would you describe the stress levels associated with your work as a charter school leader?
2. What do you believe to be the most stressful internal aspects of being a charter school leader, internal aspects meaning stressors from within the school community?
3. What do you believe to be the most stressful external aspects of being a charter school leader, with external aspects meaning stressors from outside the school community (federal, state, district, businesses, etc.)?
4. How do you try to manage the day-to-day stress of being a charter school leader?
5. How successful do you feel you are in managing the stress associated with your work?
6. Describe any periods of prolonged stress that you struggled to manage effectively, that may be perceived as experiencing some degree of burnout.
7. Are there any other questions you feel I should have asked, or other issues you would like to discuss concerning job-related stress as charter school leaders.

